

# JEWISHCOLUMBUS

## COMMUNITY IMPACT FY20 FUNDING GUIDE

Community impact is an opportunity for JewishColumbus to cohesively and seamlessly combine its financial resource development assets and knowledge of the community to better partner with and support community agencies. This new approach and philosophy will bring together the annual campaign, Foundation endowment funds resources and the extensive and expansive JewishColumbus development and marketing skills and community knowledge. Community impact will create the best of all possible worlds for our greater Columbus Jewish Community.

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# Community Impact FY20 Funding Guide

## Table of Contents

	Page #
Welcome Letter	i
Eligibility	2
FY21 Funding Request Calendar	3
Structure	4
What Is? When Is? What Year?	5
How Will It Work?	6
Strategic Initiatives FAQs	7-8
Funding Formulas	9
Available Funds	10
Letter from Staff	11
Blackbaud Grantmaking	12-13
Resource Requests	14-19
PDFs	20-22
Budgets	23-25

October 2019

Shalom,

Thank you for your interest in the seeking funding from **JewishColumbus**, a partnership of the Columbus Jewish Foundation and the Jewish Federation of Columbus. Over the past few months, community volunteers representing all three organizations and professional staff have been developing a new comprehensive, holistic and streamlined approach to benefit you, our partners.

We hope you will find our Community Impact philosophy and approach a better fit to meet your funding needs and strategic initiatives. Community impact is an opportunity for **JewishColumbus** to cohesively and seamlessly combine its financial resource development assets and knowledge of the community to better partner with and support community agencies. It will bring together the annual campaign, endowment funds resources and the extensive and expansive **JewishColumbus** development and marketing skills and community knowledge. Community impact will create the best of all possible worlds for our greater Columbus Jewish Community.

**JewishColumbus** knows that meeting all existing community funding needs, increased security expenses, ensuring that Victims of Nazi Persecution live their remaining days in dignity, and strategic initiatives cannot be met overnight. Every effort will be made to meet funding needs through the annual campaign, restricted endowment funds for new strategic initiatives and presentations to Donor Advised Fund Holders. So while we likely will not be able to meet every funding request, be assured that we will do our best to do so.

Community Impact is spearheaded by **JewishColumbus**, Legacy Foundation and Legacy Federation Trustees, donors and volunteers. They are the stewards of the community's coffers and serve as goodwill ambassadors to past, current and future donors. The Community Impact Committee (CIC) and **JewishColumbus** are committed that donor intent will be honored as will the Foundation spending policy, and each fund's corpus will remain inviolate. They all understand that the integrity of maintaining the expressed wishes of our endowment donors and will use those funds wisely.

The following pages provide you with the necessary information to seek funding for FY21. The single Resource Request portal includes sections for core, grant renewal, strategic initiatives, mini-grant, and capital repair & replacement funding, whether funded through the annual campaign or restricted endowment funds.

As you read these pages and begin your funding request, please do not hesitate to reach out to Director of Community Impact Susan Tanur at [susan@jewishcolumbus.org](mailto:susan@jewishcolumbus.org) or 614.338.2365 if you have any questions, concerns or comments.

Sincerely,

Liz Shafran, Chair  
Community Impact Committee

Susan Tanur, Director  
Community Impact

# JewishColumbus

## Community Impact

*Is your organization eligible for funding?*

**Applications from individuals cannot be entertained.**

1. All organizations must be established and current under IRS Code Section 501(c)3.
2. The applicant agency must be on sound financial footing; financial documents are required for all funding requests.
3. Organizations seeking mini-grant restricted endowment funding can only submit requests that meet the purposes of available restricted funds: Jewish Arts, Jewish Needs, Jewish Education & Literacy and Social Justice
4. Funding for overseas programs is by invitation only.
5. Funding for capital repair & replacement is by invitation only.
6. Funding for security is by invitation only.
7. **Non-local agencies must:**
  - determine that the program does not duplicate existing local services or a local agency's mission statement,
  - submit collaborative projects, such that the local agency is the co-sponsor or sponsor of the project when possible, and
  - speak with the Director of Community Impact before proceeding with the Organization Information and Financial Documentation application.

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# Community Impact FY21 Funding Request Calendar

The on-line portal will close at 5:00 p.m. on the deadline date.

Organization Information and Financial Documents Resource Request  
must be submitted prior to or concurrent with any other resource request  
and only needs to be submitted once.

November 8, 2019	Agency Partners Core Funding Resource Request
November 30, 2019	Mini-Grants Resource Request
December 13, 2019	Strategic Initiatives Resource Request
December 31, 2019	Security Funding Resource Request (by invitation only)
January 31, 2020	Mini-Grants Resource Request
February 15, 2020	CR&R Resource Requests (by invitation only)
February 15, 2020	Renewal Grant Resource Request
May - June 2020	Funding Awards Announced

# COMMUNITY IMPACT COMMITTEE | Structural Overview







## COMMUNITY IMPACT COMMITTEE (CIC)


Liz Shafran, Chair


- Reviews funding requests
- Makes funding recommendations to Board
- Meets regularly throughout the year

Liz Shafran, Chair  
Only meets to advise CIC  
about challenging situations.

CIC  
CABINET

LIASON CABINET	MINI-GRANTS PANEL	CR&R PANEL	SHALOM GRANTS PANEL	STRATEGIC INIATIVES COUNCIL	JEWISH NEEDS CABINET
<p></p> <p>Naomi Lamb, Chair</p> <p>Each committee member is tasked with understanding their partner organization's current programs/services, financial challenges and strategic initiatives while being cognizant of limited financial resources.</p>	<p></p> <p>Jody Scheiman, Chair</p> <p>Reviews funding requests bi-annually that are off-cycle or are unplanned opportunities.</p>	<p></p> <p>Howard Schottenstein &amp; Steve Heiser, Co-Chairs</p> <p>Panel recommends allocation of funds for CR&amp;R to eligible buildings.</p>	<p></p> <p>Dr. Hilda Glazer, Chair</p> <p>Recommends and processes Social Justice Shalom Grants for emergency needs in community at-large, as well as end of year do-gooder Shalom Grants.</p>	<p></p> <p>Strategic Initiatives advisors to CIC.</p>	<p></p> <p>Jim Winnegrad, Chair</p> <p>Addresses special situations (government shutdown) &amp; broad-based community initiatives (poverty).</p>

 Reports to the Board of Trustees | Funding group

 Advisory Group

## STAFF CONTACT

Susan Tanur, Director of Community Impact  
614.338.2365 | [susan@jewishcolumbus.org](mailto:susan@jewishcolumbus.org)

## What is? When is? What year?

### What is a fiscal year?

A fiscal year is defined as the time period in which an organization starts and finishes its budget, closes its books, etc. In essence, an accounting period.

### When is our fiscal year?

JewishColumbus operates on a July 1 – June 30 fiscal year. We are now in FY20 (July 1, 2019- June 30, 2020).

### What is the campaign year?

The campaign year corresponds with the fiscal year, so we are just kicking-off our 2020 Annual Campaign. What we raise in the 2020 Annual Campaign will be the source of funding for our FY21 allocations. This year's active campaign will run from September – June.

### What is our Annual Campaign allocation cycle?

Easy question, complicated answer. Several years ago the Jewish Federation of Columbus Board of Trustees, upon the recommendation of the then Planning & Allocations Committee, moved to **core funding** rather than program funding for six of our community partners (CJDS, CTA, JCC, JFS, OSU Hillel and WHV). At the same time, **core funding** was approved as a two-year commitment, barring any unforeseen major changes at an agency, a significantly reduced campaign achievement, or a need to divert resources else because of a major international event. Fortunately, none of that has occurred.

This year (FY20) is the start of the second year of the two-year local allocations cycle. When we allocate from the 2020 Annual Campaign it will be for the first- (FY21) of a two-year (also FY22) **core funding** cycle. At some point down the road, we will align local allocations with Israel & Overseas allocations; this year (FY20) represents their first-year of a two-year commitment. But that is not for today.

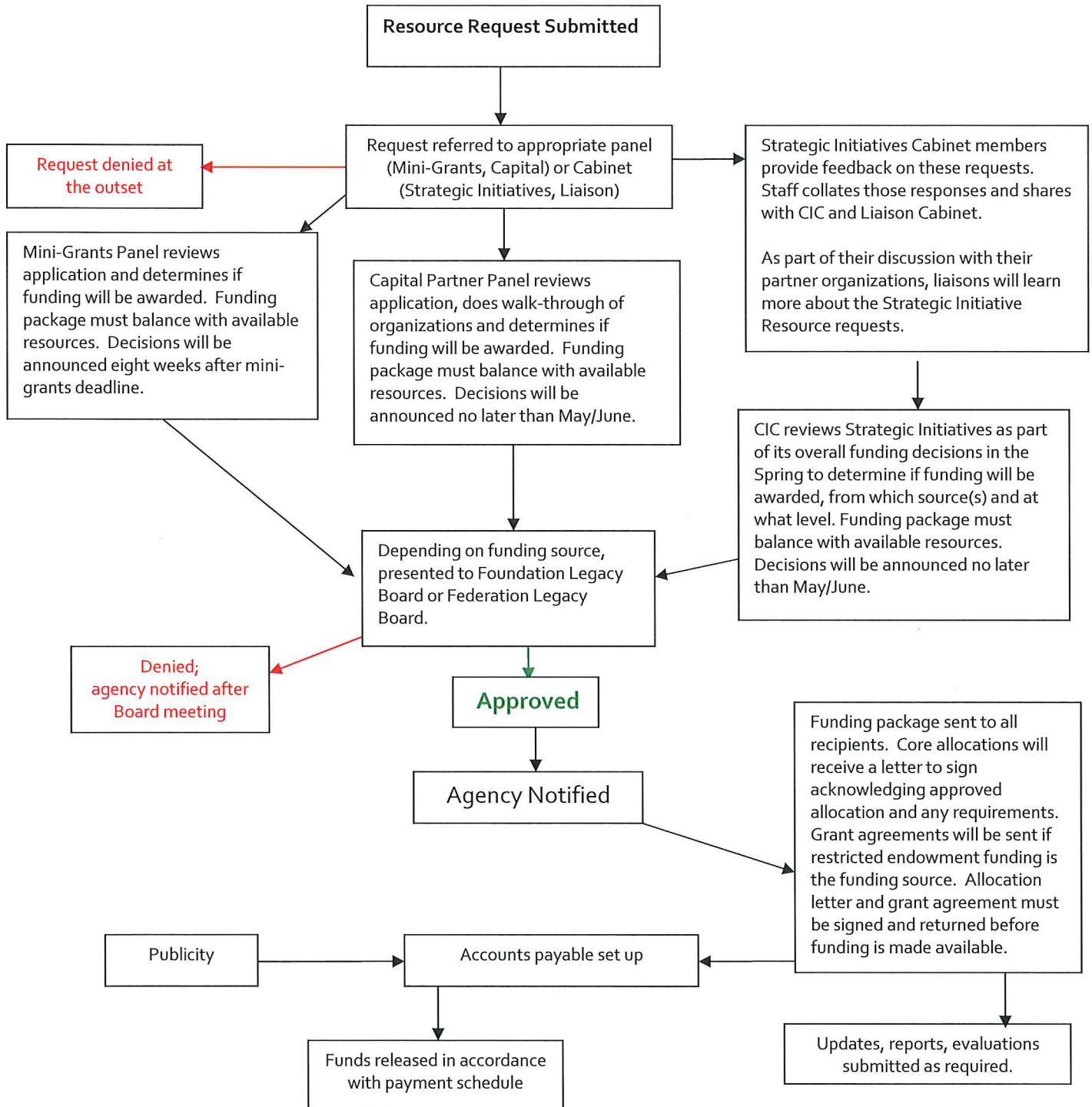
### What about funding from restricted endowments owned by the Columbus Jewish Foundation?

The Foundation uses a spending rule formula to determine the amount of grant dollars available each year from the Community Grants Fund and restricted endowments, both Board-restricted and special purpose funds. The 4% spending rule is based on a rolling 5-year average of market value as of December 31. Due to the nature of these grants, funds from future years often are pre-committed. Funds not used by the end of the fiscal year remain within the fund's corpus unless previously approved by the Legacy Foundation Board of Trustees.

On July 1 of each year (with the start of a new fiscal year), the funds available for grant purposes start again. Foundation grant dollars almost always are for new, innovative programming or expanded services to meet changing community needs and demographics. What had been known as Staying Ahead of the Curve is pretty much the equivalent of **Community Impact Strategic Initiatives**. Any funding awarded as a Strategic Initiative using restricted endowment funding will be awarded as a **grant**.

**Mini-grants** represent opportunities to fund requests that are off-cycle or are unplanned opportunities to capitalize on a speaker, artist or program coming to Columbus. Any funding awarded as a mini-grant using restricted endowment funding will be awarded as a **grant**.

# How Will It Work?



# Strategic Initiative Resource Request: Frequently Asked Questions (FAQs)

## What is a Strategic Initiative?

A Strategic Initiative (SI) is a program your agency has identified to fulfill its mission statement, meet its constituents' needs or grow and strengthen the organization. An SI typically is a new or expanded program, one that in the past you might have submitted as a grant request to the Columbus Jewish Foundation.

A strategic initiative could be expanded professional development, a new staff position or a curriculum update. It could even be a return of the Maccabi Games, a redefined community-wide Hebrew School or a community engagement project. While enhanced technology would fall under the SI category, construction or other capital projects would not.

## What is the deadline for Strategic Initiative requests and how many can be submitted?

The deadline is 5:00 p.m. on Friday, December 13, 2019. Each organization can submit up to three requests. Organizations submitting a Strategic Initiative must submit the Organization Information and Financial Documents request as well.

## After I submit my request, then what?

1. Several parallel steps will occur:
  - CIC staff will review the request.
  - All requests will be shared with the new Strategic Initiatives Cabinet comprised of individuals who previously served on grant committees and at-large community members. Each member will be provided with a ranking sheet and will be asked to return a completed sheet and provide his/her feedback on the proposal.
  - If your organization has an assigned liaison, s/he will receive the request and have an opportunity to learn more about it at your next get-together.
2. CIC staff will collate all of this information and share with the CIC and Liaison Cabinet Chairs. After their review, they will present them to the Liaison Cabinet for a collaborative dialogue and to garner any additional feedback.
3. All of the Strategic Initiatives then will be presented to the Community Impact Committee.

## What factors will the Community Impact Committee take into consideration?

1. Is the request meritorious, doable, does it relate to the mission of the institution and the goals of JewishColumbus, does the program match the goals and objectives that have been defined, can the program be evaluated and how will this be done?
2. The committee considers all of the requests they deem to be meritorious against available funds.

## Does one part of the request warrant more attention than another?

No, and be certain that:

1. goals are measurable, program design meets goals, evaluation can measure the goals,
2. goals can be defined qualitatively and quantitatively, such as how will consumers be impacted, how many will be impacted and how often,
3. there is real thought as to how the program will be funded long-term, and
4. the need for the program can be substantiated beyond hearsay and anecdotes.

## What if I am partnering with another organization?

Collaborative requests are encouraged. Whichever organization assumes fiscal and programmatic oversight should submit the application. Letters of support from partnering organizations should be submitted.



**Is my past performance on Foundation grants considered by the committee?**

Possibly, including these less than favorable situations:

1. if the committee suggested ways in which your institution could enhance its applications or the types of grants they submit and did not care to consider what has been suggested,
2. if your organization was consistently reminded about including the appropriate publicity language (as listed in the grant agreement) in its publicity and the situation was not corrected,
3. if past programs did not succeed because the institution was not delivering the program or service that was expected,
4. if evaluations of completed programs were not submitted on a timely basis, and
5. if the Foundation was not kept abreast of program, personnel or budgetary changes.

**What kind of assistance can I expect from the JewishColumbus staff?**

JewishColumbus staff will assist you in understanding the Community Impact Resource Request process and will meet with you to explore program ideas that are of interest to you. Given the breadth of the Community Impact process, staff are unable to review resource requests prior to submission.

**Will the Resource Request be presented to the Community Impact Committee as submitted?**

**Yes.** We encourage you to ask three readers unfamiliar with the request to read it to see if there are typos you missed, that grammar and readability are checked and that the numbers match all the way around.

# Columbus Jewish Foundation, A JewishColumbus Partner

## Funding Formulas

### Community Grants and Restricted Endowment Funds

The Foundation uses a spending rule formula to determine the amount of grant dollars available each year from the Community Grants Fund and these restricted endowment funds: Jewish Education & Literacy, Social Justice, Jewish Needs, Overseas Needs and the Lenore Schottenstein and Community Jewish Arts Funds. The current spending rule is 4% of a rolling 5-year average of market value as of December 31.

### Funding for Foundation or Agency Owned Endowment Funds

The Foundation manages more than 550 funds that benefit local Jewish organizations, such as scholarships and adult programming, or are for specific service areas, such as March of the Living and camp scholarships.

Several steps must be taken to determine how much is available to spend each fiscal year; it is a time-consuming, detail-oriented process:

1. review over 550 funds;
2. determine how much is available per fund based on a spending rule calculation and 5-year rolling average;
3. log information into the Foundation financial system;
4. prepare and send letters to each recipient organization, including appropriate distribution forms; and,
5. file paperwork in all primary and secondary folders.

Given the time this process requires, information on the amount of funds available and directions to request funding is mailed no later than May 30 of each year to each organization's senior lay leadership, senior professional (Executive Director, CEO, Headmaster, etc.) and Chief Financial Officer. The current spending rule is 4% of a rolling 5-year average of market value as of December 31.

### How are the funds distributed among approved grants?

The Foundation grants program benefits all community agencies. Once the Foundation Legacy Board of Trustees approves grant recommendations, payment comes from various funding sources, in the following order:

1. Agency-owned funds under Foundation management ("custodial funds").
2. Foundation-owned funds restricted to the applicant agency (e.g. Wexner Heritage Village, JCC or Hillel).
3. Foundation-owned "field of service" funds that are not agency-specific, but restricted to broad service needs (such as camperships, the aged, youth, or Jewish education).
4. Foundation unrestricted reserves.

Available FY20 Foundation Funds  
from Board-restricted endowment funds

Fund	Strategic Initiatives	Mini-grants* (10% of total available \$)
Jewish Education & Literacy	\$104,490	\$11,610
Jewish Needs	\$44,100	\$4,900
Lenore Schottenstein and Community Jewish Arts	\$60,435	\$6,715
Social Justice	\$17,100	\$1,900
<i>Understanding Jewish Concerns</i>	\$6,000	n/a
Overseas Needs	\$25,000	n/a
<i>Palus Israel Environmental **</i>	\$9,000	n/a
Community Grants Fund	\$0	\$0
<b>Total</b>	<b>\$266,125</b>	<b>\$25,125</b>

If unspent monies remain available in Board-restricted funds after funding has been determined for Strategic Initiatives, additional dollars may become available for mini-grants and a third mini-grants cycle will be added to the calendar.

\*Represents 10% of funds available, both Foundation board-restricted and named special purpose funds

\*\*\$17,000 in carry-over funding is also available through June 30, 2020

# JewishColumbus

Dear Colleagues,

By now you are familiar with our transition to a Community Impact approach and philosophy and possibly have a few unanswered questions. While much remains the same, there are several changes as well. Here are the highlights:

## ***New***

1. Community Impact Committee – funding from the Annual Campaign and restricted Foundation endowment funds will flow through here. This will enable us to cohesively and seamlessly combine our financial resource development assets and knowledge of the community to better partner with and support community agencies.
2. Liaison Cabinet – designated liaisons to meet with partner organizations at least three times a year and more as requested or needed.
3. Structure – See Page 3 for more information.
4. A one-stop destination for Resource Requests for core, grant renewal and strategic initiative funding. Blackbaud Grantmaking (formerly known as IGAM) will be used for all requests.
5. Strategic Initiatives replace grant requests that are not for renewal or mini-grant funding.
6. Two opportunities to submit mini-grant requests and two respective notification dates.
7. One awards notification letter (excluding mini-grants) in May – June.

## ***Unchanged***

1. Please call or email me if you'd like to bounce off a strategic initiative and with any questions you might have.
2. Ask three people unfamiliar with the request to read it and the budget(s) for contextual errors, typos, missing words, numbers that do not balance, etc. Requests will be shared with CIC volunteers as submitted; errors will not be corrected.
3. Submit the application at least one day prior to the deadline because you can! The earlier the better.

Best,

Susan Tanur  
Director of Community Impact  
[susan@jewishcolumbus.org](mailto:susan@jewishcolumbus.org)  
614.338.2365

## Blackbaud Grantmaking Instructions

JewishColumbus uses an online application process, Blackbaud Grantmaking (formerly known as FIMS). While there are no guarantees, it is possible that your FIMS password will work; you might wish to try that first. If not, you will need to create an account to access Blackbaud Grantmaking.

You only need to do so once, as long as you have not forgotten nor misplaced your Blackbaud Grantmaking My Account password. **Write down your Blackbaud Grantmaking password;** JewishColumbus is unable to retrieve it for you if you forgot or misplaced it. If so, you will need to click on the “Forgot Password” link or create a new Blackbaud Grantmaking account and start a new application.

Your account allows access to your saved and submitted applications at any time. It also allows us to send you email messages, such as receipt of your application. When you create your account, you will receive an automatic email with your tracking number and a link to the log-in page of your online application. Save that link, as you will use it to log-in and access your saved applications.

### STEP ONE: New Users – Create a Blackbaud Grantmaking account

- a. At Account Login, click “New Applicant?” and then click “Continue” to create your account.
- b. Enter your email address.
- c. Create a My Account password (5-25 alphanumeric characters; it is not case sensitive).
- d. Confirm your My Account password.
- e. Write down your My Account password to access saved and submitted applications and submit a new one.

**STEP ONE: Current Users – to open your existing Blackbaud Grantmaking Account to begin a new application or to continue working on a saved application, click here to access your [“My Account”](#).**

**Can't log in? Hit the Login button, instead of doing a hard return. If that does not work, send an email to [susan@jewishcolumbus.org](mailto:susan@jewishcolumbus.org).**

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### STEP TWO: Access Resource Request

Choose which resource request you wish to access and click on the appropriate link. **You will be prompted to enter a resource request password, a second password which is different from your My Account password.** Enter the password provided in earlier correspondence. If you do not know this password, send an email to [susan@jewishcolumbus.org](mailto:susan@jewishcolumbus.org).

[Organization Information and Financial Documents](#)

[Core Funding](#)

[Strategic Initiatives](#)

[Security](#)

[Mini Grant](#)

[Renewal Grant Application](#)



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### STEP THREE: Tax ID

Enter your organization's Tax ID No. If your Tax ID No. is not recognized, click the "Contact Us" tab on the top of the application to contact the Foundation's Director of Community Impact.

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### STEP FOUR: Complete the Resource Request, Upload Required Documents, Hit Submit

- a. Complete all required sections of the application.
  - b. For renewal and mini-grants, upload completed **Budget**; **right click on "DOWNLOAD," select "Save As"** to save documents to your computer before completing each form.
  - c. Attach other required and optional forms to your application.
  - d. Hit **Submit**.
- 

### HELPFUL HINTS

1. **Character limits** allow us to efficiently evaluate the many applications we receive. Text beyond the limit will be cut off. Consider first typing your answers into a Microsoft Word Document to benefit from word count and spell-check features. When your answer is finished, copy and paste it into the online application. (The online application will not retain any Word formatting, such as numbers, bullets, bold or italics.)
2. **Save** your in-process application by clicking the "Save and Finish Later" button at the bottom of the application form.
3. When you are satisfied that your application is complete, click the "Review and Submit" button at the bottom of the last page. **Proof carefully.** After you have reviewed your application, click the "Submit" button. Once you hit the "submit" button, you cannot retrieve your application – similar to dropping an envelope in a mail box. You can, however, completely resubmit the application with your changes, as long as the deadline has not passed.
4. **Print** a copy of your application for your records. An automated email will be sent to you from [susan@jewishcolumbus.org](mailto:susan@jewishcolumbus.org) when your application is received. If for some reason you do not receive confirmation within three days, please contact us. Remember to check your spam, junk and/or bulk mail folders for this email.
5. If you want to **review** your application(s) or **submit a new application**, visit [www.jewishcolumbus.org](http://www.jewishcolumbus.org), click on "Community Impact" from the navigation bar and then click "My Account" or "New Resource Request Application" both to the right of the navigation bar.
6. **Remember** that the on-line application will close immediately following **the 5:00 p.m. deadline.**

If you have further questions, [contact Director of Community Impact Susan Tanur](#) at 614.338.2365.

T:\Foundation Files\Grants\Community Impact\Funding Guide\Blackbaud Grantmaking Instructions.docx

Welcome to the new Community Impact Resource Request portal for partnership funding from JewishColumbus. This portal is designed to be a **one-stop destination** for what traditionally have been annual allocation, bi-annual grant applications, capital repair and replacement request and special purpose funding distributions. There are numerous parts to this form, some required, some optional and others by invitation only.

Whether your organization is seeking continued core funding, a grant renewal or support for a new strategic initiative – or perhaps more– this is where you want to be.

**Organization Information and Financials (Required prior to or when submitting the first resource request; only needs to be submitted one.)**

Organization

Address

Phone Number

Website

Senior Professional (name, title, direct phone no. and email address)

Senior Lay Volunteer (name, title)

Mission Statement and Year Approved

**Required Attachments**

1. 990 - If your organization is not required to submit a 990; instead send a letter on stationery indicating this.
  2. Most recent audit.
  3. Current operating budget in Excel format.
  4. Board Roster (names, addresses and phone numbers) in Excel format.
- 

**PART II: FY21 Core Funding (Required for Partner Agencies Receiving Core Funding)**

**Deadline is November 8, 2019 at 5:00 .m.**

**By Invitation Only**

Core funding was reinstated for the current FY20 year following an in-depth study by the then Federation Planning & Allocations Committee and in consultation with donors and agency partner organizations. Core funding supports your organization, key programs and events that reflect the mission of JewishColumbus and as determined by your Board.

The FY20 core funding base is a reflection of the previous year's programmatic or per/student funding and the available unrestricted campaign dollars and was pre-approved for a two-year period, plus additional funding for increased security needs. Notwithstanding this pre-commitment to FY21 funding, the JCC, CTA, CJDS, JFS, WHV and OSU Hillel will want to submit this section so that they continue to receive core funding, provide updated information to JewishColumbus and its donors on its services and let us know how JewishColumbus can help you.

**The Numbers**

Core FY20 allocation:

Security funding (June – September 2019):

Capital Repair & Replacement funding:



## Constituents

1. Looking back at the services your organization provided in FY19, approximately how many
  - a. Jews received/participated in services – unduplicated count:
  - b. Jewish families (a single person, such as a college student or young adult, counts as one family) did you serve – unduplicated count:
2. Based on your answer to 1a, what is the age range of those directly served? Numbers must add up to the figure provided in 1a.
  - School-age (0-17):
  - College-age & Young Adults (18-30):
  - Families with School-age Children (31-51):
  - Baby Boomers (52-70):
  - Older Adults (71+):
3. Based on your answer to 1b, in which geographic regions do they live? Numbers must add up to the figure provided in 1b.
  - Bexley, Berwick, Eastmoor:
  - Northwest (Worthington, Dublin, Hilliard, Powell, Clintonville, Upper Arlington):
  - East (Gahanna, New Albany, Reynoldsburg, Pickerington):
  - West (Downtown, University, Grandview Heights, Short North):
  - Counties Contiguous to Franklin County:
  - Other:
4. If you would like to share anecdotal information about your constituents, please do so here.

## Key Services

5. In this section, we'd like to know more about your key service areas; **use the PDF Key Services to complete this section.** Need fewer, no problem. What are we looking for? **Core service areas:** Jewish Education, Senior Services, Counselling, Advocacy, etc. and the **percentage of core funding** for these core services. **Top two/three programs** in each core area.
6. Other than security, what, if any, were the major challenges encountered last year (FY19)? Are you able to address them this year?
7. How do you continuously evaluate your main programs to ensure that they are meeting the needs of your constituents, agency benchmarks, accreditation agencies, etc.?

## Telling Your Story

8. Our partnership with you goes far beyond core funding. We are here to support your efforts, advocate on your behalf, provide the resources for your LIFE & LEGACY success and tell your story. Together we strengthen and grow the JewishColumbus annual campaign and share your successes and priorities with the community. **Use the PDF Telling Your Story** to list up to ten top facts, figures and anecdotes you'd like us to use in our new marketing materials, particularly as they relate to the core funding JewishColumbus provides.

## Allocation Request Summary

9. We are overflowing with optimism that our annual campaign will continue to increase year after year. While we do not know how this will translate to increased core funding, how would your organization apply increased funding and why?

10. If your organization anticipates that it might reallocate core funding in FY21 (next year) from how it now is being allocated (see Key Services 2.), what might that be and why?

## **Narrative**

Tell us more.

11. Please share with us programs or areas in which your organization is collaborating with other Jewish or community charitable organizations. Can we help facilitate collaboration with others?
12. How can JewishColumbus help your organization better achieve its mission?
13. If your organization utilized the grant writer, please share your experiences so that we can ensure that we are meeting your needs.
14. If there is anything else that you would like us to know, please use this space to inform us about personnel changes, training, innovation, technology, fundraising and/or any other areas in which you might need support from JewishColumbus.
15. Excluding any strategic initiatives you submit, what items, programs, capital needs, personnel, etc. are on your wish-list

## **Contact Person for Request (name, title, direct phone no. and email address)**

### **PART III: Grant Renewal(s)**

**Deadline is February 15, 2020 at 5:00 p.m.**

**By Invitation Only**

Project Name (5 words or less):

Project Purpose (10 words or less):

Amount of Current Grant:

Total Current Project Budget:

Renewal Grant – Project Start and End Dates:

Renewal Grant – Amount Requested:

Renewal Grant – Total Project Budget:

1. What is the project?
2. How and where will it be delivered?
3. What are the key activities?
4. Who is the target population?

5. How many will be served? What percentage is Jewish?
6. Why is there a FISCAL need for continued grant funding?
7. If the full grant request cannot be met, what changes will be made for the project to proceed as presented above?
8. How will your organization fund this program at the conclusion of grant funding?

**Required:** Renewal Budget Form

## **Part IV: Strategic Initiatives (Required for New and Expanded Funding)**

**Deadline is December 13, 2019 at 5:00 p.m.**

Community Impact is JewishColumbus' thought process and action plan to define and develop a new relationship with our partners. We envision increased and better cross-communication, a holistic funding approach and a stronger partnership. Part IV Strategic Initiatives is your opportunity to present your top three priorities that will address your organization's increased needs, unmet populations, new or expanded programs, including programs that no longer are eligible for grant funding.

Our commitment is to see how we can help. We might offer the services of our grant writer. Perhaps we will find grant funding. We could recommend other funders or approach selected Donor Advised Fund Holders. Pull out your white board and begin. *You may submit up to three strategic initiatives.*

Project Name (five words or less):

Project Purpose (8 words or less):

Project Start and End Dates:

Amount Requested:

Total Project Budget:

### **Project Description**

1. What is the project?
2. How and where will it be delivered?
3. What are the key activities?
4. Who is the target population?
5. How many will be served? What percentage is Jewish?
6. Why is this a strategic initiative of your organization? What are the current needs, community changes or recent events that led your organization to submit this proposal now? Reference and/or attach supporting data.



## Engagement and Evaluation

7. What is the primary long-term goal for this project?
8. What is the primary short-term goal for this project?
9. **Use the PDF Strategic Initiatives – Objectives** to list up to three objectives for this project, how each will be measured and what will define success for each one.
10. How are volunteers engaged in this project?
11. Who will oversee this project?

## Funding

12. What is the status of requests to other funders listed in the budget?
13. Why is there a fiscal need for JewishColumbus funding?
14. If JewishColumbus can only partially fund your request, what changes will be made for the project to proceed as presented above?
15. If this is an ongoing program, what plan is in place for continued funding?

## Other

Is there anything else you'd like to share about this project not previously addressed?

**Required:** Strategic Initiative Budget Form

## Part V: Mini-Grant Requests

**Deadline:** November 30, 2019 and January 31, 2020 at 5:00 p.m.

Mini-Grant funding is for requests that are off-cycle or are unplanned opportunities to capitalize on a speaker, artist or program coming to Columbus. There is a limited pool of funding available along with a cap on how much can be requested from each restricted endowment fund:

- Community Grants: \$2,500 for Jewish organizations; \$1,000 for community organizations
- Jewish Education & Literacy: \$2,500 for Jewish organizations; \$1,000 for community organizations
- Jewish Arts: \$2,500
- Social Justice: \$1,500
- Jewish Needs: \$2,500

Application deadline:

- November 30; notification no later than January 31.
- January 31; notification no later than March 31.

Project Name (five words or less):

Project Purpose (8 words or less):

Project Start and End Dates:

Amount Requested:

Total Project Budget:

## **Project Description**

1. What is the project?
2. How and where will it be delivered?
3. What are the key activities?
4. Who is the target population?
5. How many will be served? What percentage is Jewish?

## **Engagement and Evaluation**

8. What is the primary short-term goal for this project?
10. How are volunteers engaged in this project?
11. Who will oversee this project??
12. How will the project be evaluated?

## **Funding**

12. What is the status of requests to other funders listed in the budget?
13. Why is there a fiscal need for JewishColumbus funding?
14. If JewishColumbus can only partially fund your request, what changes will be made for the project to proceed as presented above?

## **Other**

Is there anything else you'd like to share about this project not previously addressed?

**Required:** Mini-Grant Budget Form

# JEWISHCOLUMBUS

## CORE FUNDING *Resource request*

### Key Services

In this section, we'd like to know more about your key service areas; we've provided space for your top four in order of priority:

- Need fewer? *No problem*
- Need more? *Go for it!*
- Here is what we're looking for?
  - **Core service areas:** Jewish Education, Senior Services, Counselling, Advocacy, etc.
  - **Percentage of core funding** for these core services
  - **Top two/three programs** in each core area

#### Priority 1

Core service area:

Percentage of core funding:

Top programs

#### Priority 2

Core service area:

Percentage of core funding:

Top programs

#### Priority 3

Core service area:

Percentage of core funding:

Top programs

#### Priority 4

Core service area:

Percentage of core funding:

Top programs

# JEWISHCOLUMBUS

## CORE FUNDING *Resource request*

### Key Services

In this section, we'd like to know more about your key service areas; we've provided space for your top four in order of priority:

- Need fewer? *No problem*
- Need more? *Go for it!*
- Here is what we're looking for?
  - **Core service areas:** Jewish Education, Senior Services, Counselling, Advocacy, etc.
  - **Percentage of core funding** for these core services
  - **Top two/three programs** in each core area

#### Priority 1

Core service area:

Percentage of core funding:

Top programs

<input type="text"/>	<input type="text"/>	<input type="text"/>
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#### Priority 2

Core service area:

Percentage of core funding:

Top programs

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

#### Priority 3

Core service area:

Percentage of core funding:

Top programs

<input type="text"/>	<input type="text"/>	<input type="text"/>
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#### Priority 4

Core service area:

Percentage of core funding:

Top programs

<input type="text"/>	<input type="text"/>	<input type="text"/>
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# JEWISHCOLUMBUS

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## STRATEGIC INITIATIVES *Resource Request*

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List up to three objectives for this project, how each will be measured and what will define success for each one.

Objective I:

Measurement Tool:

Definition of Success:

Objective II:

Measurement Tool:

Definition of Success:

Objective III:

Measurement Tool:

Definition of Success:



JewishColumbus: Strategic Initiative Request  
 Priority No.: **Indicate if this is Priority 1, 2 or 3**  
 Organization: **Fill in your organization's name**  
 Project Name: **Fill in the project name**

	Proposed Budget	Comments (name of funder, explanations, etc.); please provide as much information as possible to minimize additional questions
<b>Income</b>		
JewishColumbus Request	\$0	
Public Funds	\$0	
Foundations	\$0	
Fees/tuition	\$0	
United Way	\$0	
Donations/Fundraising	\$0	
Your Organization** see below	\$0	
Other (please list)	\$0	
	\$0	
	\$0	
	\$0	
<b>Total Income</b>	<b>\$0</b>	
<b>Expenses</b>		
Salaries	\$0	
Benefits	\$0	
Conference Fees & Travel, etc.	\$0	
Food	\$0	
Indirect Expenses (admin chargeback, supervision, facilities and utilities usage, etc.)	\$0	
Marketing/Postage	\$0	
Office Expenses	\$0	
Outside Professional Services/Fees	\$0	
Program Materials, Direct Expenses	\$0	
Scholarships/Financial Assistance	\$0	
Speaker Fees/Honorarium	\$0	
Staff Development	\$0	
Other (please list)	\$0	
	\$0	
	\$0	
	\$0	
<b>Total Expenses</b>	<b>\$0</b>	
<b>Surplus/Deficit</b>	<b>\$0</b>	
If there is a surplus, how will these funds be used? If there is a deficit, how will it be covered?		

T:\Foundation Files\Grants\Community Impact\Budget - Strategic Initiative.xlsx

\*\* Includes allocated staff salaries and benefits, general income allocated for overhead, etc.

## Mini-Grant Application

Organization: **Fill in your organization's name**

Project Name: **Fill in the project name**

	Proposed Budget	Comments (name of funder, explanations, etc.)
<b>Income</b>		
JewishColumbus Request	\$0	
Your Organization**see below		
Public Funding		
Foundations	\$0	
Fees/tuition	\$0	
Donations/Fundraising	\$0	
Other (please list)	\$0	
	\$0	
	\$0	
<b>Total Income</b>	<b>\$0</b>	
<b>Expenses</b>		
Salaries	\$0	
Benefits	\$0	
Food	\$0	
Indirect Expenses (admin chargeback, supervision, facilities and utilities usage, etc.)	\$0	
Marketing/Postage	\$0	
Outside Professional Services/Fees	\$0	
Program Materials, Direct Expenses	\$0	
Scholarships/Financial Assistance	\$0	
Speaker Fees/Honorarium	\$0	
Staff Development	\$0	
Other (please list):	\$0	
	\$0	
<b>Total Expenses</b>	<b>\$0</b>	
<b>Surplus/Deficit</b>	<b>\$0</b>	
If there is a surplus, how will these funds be used? If there is a deficit, how will it be covered?		

**Renewal Grant Application**
**Organization:** Fill in your organization's name

**Project Name:** Fill in the project name

	Current Project Budget	Expenses To Date	Year-End Projections	Next Year's Proposed Project Budget	Comments - Explain any differences of 10% +/- between Columns D and E
<b>Income</b>					
Your Organization** see below	\$0	\$0	\$0	\$0	
Columbus Jewish Foundation Grant	\$0	\$0	\$0	\$0	
Jewish Federation of Columbus	\$0	\$0	\$0	\$0	
Foundations	\$0	\$0	\$0	\$0	
Public Funding	\$0	\$0	\$0	\$0	
Program fees/tuition	\$0	\$0	\$0	\$0	
Fundraising/Contributions	\$0	\$0	\$0	\$0	
Other (please list)	\$0	\$0	\$0	\$0	
	\$0	\$0	\$0	\$0	
	\$0	\$0	\$0	\$0	
<b>Total Income</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	
<b>Expenses</b>					
Professional Salaries	\$0	\$0	\$0	\$0	
Support Salaries	\$0	\$0	\$0	\$0	
Benefits	\$0	\$0	\$0	\$0	
Staff Development	\$0	\$0	\$0	\$0	
Outside Consultant(s)	\$0	\$0	\$0	\$0	
Speaker Fees/Honorarium	\$0	\$0	\$0	\$0	
Travel Expenses	\$0	\$0	\$0	\$0	
Office Expenses	\$0	\$0	\$0	\$0	
Public Relations & Marketing	\$0	\$0	\$0	\$0	
Program Expenses	\$0	\$0	\$0	\$0	
Food: the Columbus Jewish Foundation does not provide funding for food	\$0	\$0	\$0	\$0	
Financial Assistance	\$0	\$0	\$0	\$0	
Other (please list):	\$0	\$0	\$0	\$0	
	\$0	\$0	\$0	\$0	
	\$0	\$0	\$0	\$0	
<b>Total Expenses</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	
<b>Surplus/Deficit</b> If there is a surplus, how will these funds be used? If there is a deficit, how will it be covered?					

T:\Foundation Files\Grants\Community Impact\Funding Guide\Budget - Renewal Application.xlsx

\*\* Includes allocated staff salaries and benefits, general income allocated for overhead, etc.