

**National Federation/Agency Alliance**  
**FY 2008-09 QUESTIONNAIRE**

Please submit a relatively concise paper (approximately 3 – 5 pages) to the Alliance by **January 31, 2008**, describing your agency and explaining how it provides benefit to the Jewish community and specifically to the federation system. This paper will be disseminated to the community members of the Alliance. (Alternatively the questions can be addressed individually).

The paper should be submitted electronically and specifically address the following issues:

- The mission of your agency. Has it been recently reviewed and/or revised?
- The major programmatic foci and functions of your agency and any significant programs that have been discontinued since last year;
- Your agency's major accomplishments last year and any major disappointments that it may have experienced;
- Any significant changes in professional (senior staff) or lay leadership (a new chair or chair-designee) for your agency;
- Your agency's major priorities for the next year;
- The long-term (five year) priorities for your agency;
- The results of any strategic planning engaged in by your agency in the prior 12 months and how this plan takes your agency in a different strategic direction;
- Any formal partnerships you have with other national Jewish agencies, particularly those that receive funding through the Alliance;
- An overview of your "business model," including membership, clients, governance structure, and any reliance on government funding;
- If your agency is a national organization that represents local agencies, what significant issues or problems are facing those local agencies and what is your national agency doing to address those issues;
- How your agency works with federations and UJC to promote items on the local and national agenda, and any involvement by federations/UJC in selecting members of your boards; and
- Any significant changes in your agency's operating budget since last year, whether your agency has an operating deficit and your plan to address this deficit,

and any major financial obstacles that your agency is likely to face in the next five years.

## **REQUIRED ATTACHMENTS**

(For all that are feasible, please submit electronic versions of the following documents):

- Strategic plan, if completed in the last 12 months;
- Current agency by-laws (unless you submitted them to the Alliance last year and they are unchanged);
- Current board list, including communities represented by board members and any significant affiliation that board members may have with federations;
- Organizational chart of employees;
- Proposed agency budget for the period of 7/1/08 – 6/30/09, including projected revenue, and the proposed and actual budget for the last full year for which there has been a completed budget. A proposed and an adopted budget can be included for FY 08-09, if the agency's fiscal year is different from the Alliance's;
- Most recent annual report;
- Most recent audit report with management letter; and
- A listing of all revenues received from each federation that does not participate in the Alliance with a notation whether revenue is for dues, an allocation, or other type of payment.

## **ACCESSING ADDITIONAL ALLIANCE FUNDS BASED ON PRIORITIES**

The Alliance has selected five priorities for FY 2008-09 and FY 2009-10. In alphabetical order, they are as follows:

- 1) Building Capacity and Servicing Local Agencies.** This priority has two key focuses. The first is *Human Resource Development* with a focus on both recruitment, development and retention of Jewish communal professionals and on volunteer leadership development. The second is *Infrastructure Support and Institution Building* which includes serving as a clearing house to gather and disseminate data relating to all issues of concern of local agencies and federations, enhanced communication resources, governance training, and effective grant writing.
- 2) Engaging the Next Generations.** This priority includes Israel experience, Jewish camping, Jewish preschool, advocacy as a tool to engage Jews, and Jewish service.
- 3) Formal and Informal Jewish Education.** This priority includes affordability of Jewish education, strengthening of day schools, Jewish camping as an outlet to promote Jewish education, and quality supplemental education.

**4) Israel.** This priority includes pro-Israel advocacy and education, and Israel experience; and

**5) Strengthening Jewish Identity.**

A planned five percent of Alliance funds (approximately \$375,000) will be set aside in 2008 and awarded to the national agencies that present the best case on how they can advance one or more of the Alliance priorities. *These funds will be awarded either for core operating support for national agencies that as a whole best advance one or more of these priorities or to fund a specific program at a particular agency that best advances one or more of these priorities.*

Please describe how your agency both individually and, if relevant, in collaboration with other national agencies advances each of these priorities. Please also submit up to *two* proposals that your agency believes would advance one or more of these priorities in an innovative manner and indicate which proposal is of higher priority for your agency (or whether they are of equal priority). Proposals can be for any amount up to \$100,000. The Alliance will consider but not commit to a two year funding request and will not necessarily fund proposals in each of the five priority areas.

With each proposal submission, please include the following information:

- An overview of the project that is no longer than two sentences;
- A short narrative describing the project that
  - discusses how it will advance one or more Alliance priority and how your agency is uniquely positioned to undertake this project;
  - states whether it is a new project or an existing program of your agency and whether it involves collaboration or cooperation with agencies that receive allocations through the Alliance, other national agencies within the Jewish community, or specific federations;
  - describes how your agency will be able to show at the conclusion of the project whether it advanced an Alliance priority; and,
  - if the Alliance funded this program for FY 2007-08, explains what has been achieved so far in this fiscal year that advances an Alliance priority.
- A proposed budget for the proposal and whether the proposal would still be viable in advancing an Alliance priority (and useful to your agency) if it received one quarter or one half of the requested funding.

## **BASIC REQUIREMENTS FOR ALL RECIPIENT AGENCIES OF ALLIANCE FUNDING**

- Compliance with generally accepted accounting principles (GAAP);
- Annual audit by independent firm;
- By-laws in effect that conform to legally accepted standards, including provisions for appropriate lay oversight of all fiduciary matters; and
- An agreement to comply with the National Federation/Agency Alliance Acknowledgment and Financial Resources Development Guidelines.

The \_\_\_\_\_ (National Agency)  
complies with these basic requirements

\_\_\_\_\_ (CEO) \_\_\_\_\_ (Date)

Please email all responses to [Stephan.Kline@ujc.org](mailto:Stephan.Kline@ujc.org) by January 31, 2008. If relevant materials need to be mailed, please submit to Stephan Kline, UJC, 1720 I Street, NW, Suite 800, Washington, DC 20006.