

**National Federation/Agency Alliance
FY 2010-11 QUESTIONNAIRE**

Please email all responses to Stephan.Kline@JewishFederations.org by February 1, 2010. If relevant materials need to be mailed, please send them to Stephan Kline, The Jewish Federations of North America, 1720 I Street, NW, Suite 800, Washington, DC 20006.

I. NARRATIVE AND BACKGROUND QUESTIONS

Please submit a relatively concise paper describing your agency and explaining how it provides benefit to the Jewish community and the federation movement. The paper should be submitted electronically and specifically address each of 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 or added since last year and the reasons for major changes in program;
- Your agency's major accomplishments during the past year and any major challenges in addition to the recession that it may have experienced; major priorities for the next year; and long-term (five-year) priorities.
- The continuing impact of the recession on your agency (describe this in detail and state how it has affected each of your agency's major revenue streams), the total dollar amount of revenue that your agency has attracted from all sources for the past year compared to the prior year, whether your agency has an operating deficit and how its plans to address this deficit, whether your agency has cash reserves or an endowment fund (and how these have changed in the past year) and any plans to grow these funds, and what your agency would do to balance its budget if revenue does not come in as projected over the next year;
- Any significant changes in professional (senior staff) or lay leadership (a new chair or chair-designee), and anticipated staffing challenges for your agency;
- The results of any strategic planning engaged in by your agency in the prior 36 months and how your agency is advancing the strategic plan;
- 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, total number of staff (FTEs) and any reliance on government funding, and how these numbers may have changed in the previous year;

- If your agency is a national organization that represents local agencies, what significant challenges are facing those local agencies (including economic challenges) and what your national agency is doing to address those issues; and
- Generally describe how your agency works directly with the federations (as opposed to any of your local affiliates in communities). Please list any **significant projects** your agency has engaged in directly with any of the 33 federation members of the Alliance in the prior year. Feel free to use this chart to answer the second half of this question:

Federation	Short Description of Project	Date
Example Federation	Major consulting project on X	6/09 – 10/09
Example Federation	Cultural program implementation	12/09
Atlanta		
Baltimore		
Boston		
Chicago		
Cleveland		
Colorado		
Columbus		
Dallas		
Detroit		
Greenwich		
Houston		
Jacksonville		
Long Beach		
Los Angeles		
Louisville		
Memphis		
Metrowest		
Miami		
Milwaukee		
Minneapolis		
New York		
Northeast New York		
Northern New Jersey		
Ocean County		
Orange County, NY		
Pittsburgh		
Rhode Island		
Sarasota-Manatee		
Southern Arizona		
Springfield		
St. Louis		

Tidewater		
Washington, DC		

II. REQUIRED ATTACHMENTS

For all that are feasible, please submit electronic versions of these documents to Stephan Kline:

- Strategic plan, if completed in the last 12 months;
- Current board of directors/board of governors lists, including communities represented by board members and any significant affiliation that board members may have with federations;
- Copies of your agency current budget, next proposed budget and last completed budget;
- Most recent annual report;
- Most recent audit report with management letter; and
- A listing of all revenues received from all U.S. federations with a notation whether revenue is for dues, an allocation, or other type of payment.

III. PRIORITIZATION AND OUTCOME EVALUATIONS

The Alliance has adopted two groups of priorities for 2010-11 that are of equal importance:

A. Organizational Development and Operations

Having each national agency promote the Federation movement individually and through collaboration with each other to **Build Capacity and Service Local Agencies** with particular emphasis on *Infrastructure Support and Institution Building* (Strengthening local Jewish community and its institutions and allowing them to respond to the recession, leverage additional funding opportunities, and develop expertise in governmental and public affairs) and *Human Resource Development* (recruitment, development and retention of Jewish communal professionals and volunteer leadership development).

B. Programmatic Foci

- **Human Services** with particular emphasis on aging/older adults and economic vulnerability among Jews;
- **Israel** with particular emphasis on pro-Israel advocacy/education and Israel experience; and
- **Jewish life and learning** with particular emphasis on outreach within the Jewish community to the unaffiliated; formal and experiential Jewish education;

strengthening Jewish identity; and engaging the next generation of volunteer leaders.

1) For each priority listed above, what are the resources that your agency has invested over the past year in staff time in FTES and budget dollars as a percentage of your overall agency budget? Please provide a very short narrative on the engagement of your lay leadership in advancing each priority. The Alliance recognizes that there may well be overlap among the different priorities as a single program could fit within multiple priorities.

2) For each priority listed above, briefly list and describe all of the activities, programs, and products your agency is currently engaged in to advance the priority.

3) For each activity/program/product that represents at least 5% of your agency's budget:

- What are the short-term (6 month), intermediate term (12 month), and long-term implementation schedule and goals of the activity/program/product?
- What are the target groups for this activity/program/product? Please list the organizations or client groups the program/product/activity is designed to benefit.
- How many end-users and/or organizations use or you anticipate will use this activity/program/product?

If an activity/program/product fits within more than one priority, please only answer once but show how it applies to multiple priorities.

4) For this year (FY 2010-11) for each priority area representing at least 10% of your agency's budget, please list and describe outcomes -- changes in behaviors, attitudes, skills, and/or knowledge -- your agency has achieved through its activities/programs/products. Please provide any available qualitative or quantitative data that demonstrate such change. Your agency does not have to do any external data collection to respond to this question.

5) In consultation with the Alliance, each agency will develop a plan for defining qualitative and quantitative "measures of success" and then gathering data related to the agency's work on each of the Alliance priorities that constitute a significant percentage of the agency's budget. These measures, where possible, should be outcome-based and will be used, in part, to evaluate the agency for the 2011-2012 funding cycle.

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;
- An agreement to comply with the National Federation/Agency Alliance Acknowledgment and Financial Resources Development Guidelines;
- Participation (contributions) by all Board Members and Senior Staff in a local federation's annual campaign;
- Participation in outcome-based evaluation consistent with Section III of this questionnaire.

The _____ (National Agency)
complies with these basic requirements

_____ (CEO) _____ (Date)