







Budget & Allocations Report

FY 2014-2015

(June 1, 2014 – May 31, 2015)

Jewish Federation
OF METROPOLITAN DETROIT

Our Mission

The Jewish Federation of Metropolitan Detroit is dedicated to serving the needs of the Jewish people locally, globally and in Israel. Federation is the community leader, and through its annual fundraising campaign provides for a vibrant and secure Jewish community, now and into the future.

Jewish Federation
OF METROPOLITAN DETROIT

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Planning and Allocations Steering Committee

We gratefully acknowledge the work and commitment of the members of the FY 2013-14 Planning and Allocations Steering Committee.

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Planning and Allocations Steering Committee (PASC)
2014-15 Allocations
Larry Nemer, Chairperson

Why Federation?

As the major instrument of Jewish philanthropy and engagement in the Detroit area, we are a community-driven organization committed to taking care of the needs of the Jewish People and building a vibrant Jewish future, in metropolitan Detroit, in Israel and around the world.

Through our Annual Campaign, Federation raises and allocates funds to provide life-saving and life-enhancing humanitarian assistance to those in need, including seniors, the disabled, the unemployed and other individuals and families. Additionally, Federation works to translate Jewish values into social action and to provide avenues for Jewish education, enrichment and continuity throughout the community.

Locally, Federation supports a family of 17 Jewish agencies and schools across metropolitan Detroit. Working with its global partners, Federation also impacts the lives of thousands of Jews throughout Israel, in the former Soviet Union, and in 60 countries around the world.

Federation is the heart and soul of our community's philanthropic and humanitarian activities. It builds and strengthens Jewish community. Federation is the one place that belongs to every Jew, the place where philanthropy, volunteerism and shared commitment come together to make a difference, *to repair the world*.

There are many doors into Federation and many ways to contribute and participate in our vital work. Each person can choose his/her own door, be that through hands-on volunteerism with one of our constituent agencies, a contribution to Federation, helping raise money on behalf of the community, participating in Mitzvah Day, and so many more ways. Federation welcomes everyone and hopes that if they haven't already, they will become involved in ensuring the present and future of our Jewish community.

Federation 2014

Federation's wonderful leadership, staff and generous donors are addressing the challenges around us. We are a community that cares. This year, our community is projected to raise $29.8 million for the Annual Campaign and $3.66 million for the Davidson Foundation Challenge Fund, a remarkable achievement given current economic conditions. These funds will help us achieve our goals:

- Ensure that there is a safety net of services for those in need in our community.

- Provide a Jewish education for our children and a myriad of experiences to strengthen their Jewish identity.
- Attract and retain our young adults and connect them to the Jewish community.
- Help our older adults maintain their independence and live their lives in dignity.
- Ensure the future vitality of our Jewish community.

In furtherance of our goals, we continue to emphasize and support the following:

1. **Our Annual Campaign:** By working together as a community, we increased our donor base in 2013 to 11,600 donors. The goal is to increase the donor base to 12,000 this year.

2. **The Jewish Assistance Network:** We continue to work together as a community to provide assistance to our communal members in financial distress and to connect them to the job opportunities and training that they need to return to self-sufficiency. This year, our efforts:

    a. Helped Jewish Family Service provide approximately 820 individuals and families in crisis in our community with emergency financial assistance and case management.

    b. Assisted Jewish Family Service's Project Chessed to provide prescription assistance and access to pro-bono medical care for 638 clients. 436 clients were assisted with signing up for permanent health care. It is expected that Project Chessed will in the next few months transition the remainder of its clients, who are all Medicaid eligible, into the Medicaid expansion program provided by the State, which got a late start.

    c. Helped Jewish Senior Life and Jewish Family Service provide 101,500 hours of in-home support services to 760 older adults to enable them to remain living at home.

    d. Provided scholarship support for the day schools to help make a Jewish education possible for 1,600 students in need of financial assistance.

    e. Provided the congregational schools with over $455,000 in scholarship support.

    f. Helped the Jewish Community Center and Tamarack Camps provide approximately $1.53 million in Jewish camp scholarships.

    g. Helped provide Jewish Family Service with staff to respond to over 8,900 intake calls from community members in distress or just needing information.

    h. Helped JVS provide employment services to 3,600 members of the Jewish community.

i. Helped Hebrew Free Loan to provide loans for living expenses, transportation, vocational training, student loans and additional vital needs. The agency currently has a total loan portfolio of over $6.3 million and over 6,100 individual loan accounts.

j. Helped the campus Hillels (Michigan State University Hillel, Michigan Hillel at University of Michigan, Hillel of Metropolitan Detroit plus the MSU Hillel Campus Alliance of Michigan - HCAM, which expanded this year to 9 small community campuses throughout Michigan) to serve 6,400 Jewish students..

3. **NEXTGen:** To support our initiative to attract, retain and engage young Jewish adults in the metropolitan Detroit area and connect them to Federation, we continue to invest in NEXTGen. Huge successes this year include social/fundraising events, such as Latke Vodka and EPIC. There are approximately 5,000 participants in NEXTGen activities. Over 600 people attended EPIC, which raised over $300,000, had 131 new donors and a 26% gift for gift increase; over 1,000 young adults went to Latke Vodka, and Detroit had the largest contingent (63 people) at JFNA's TribeFest in New Orleans in March. NEXTGen grew their donor base from 1,000 donors in 2010 to 2,650 in 2013.

   In the less than a year since she began her work at Federation, our new NEXTGen Career Development Associate, Amy Brody, has had direct contact with 131 students and with 122 job seekers. She has helped 15 young Jewish adults find permanent jobs and has placed 75 students in summer internships.

4. **Centennial Fund:** Two years ago, we launched the Centennial Fund to raise $250 million in new endowments to ensure that we will be able to meet the growing needs for social services and Jewish identity development programs in the future. To date approximately $119.1 million ($57.6 million in lifetime, $53.9 million in testamentary and $7.6 million in capital gifts) has been pledged for the Centennial Fund. These funds are needed to secure the future of our local Jewish community, as well as strengthen the lives of Jews in Israel and around the world by targeting four broad areas of interest:

   a. **Social Welfare** - support for the Foundation for our Jewish Elderly as well as support for other vulnerable populations, including children and families at-risk.

   b. **Jewish Identity and Education** - support for the Foundation for Jewish Education as well as a progression of Jewish experiences from day schools to congregational schools, from day care to camping, from BBYO and the Hillels on our college campuses to Community Birthright Israel.

   c. **Global Jewish Responsibility** - continue Detroit's leadership role in helping Jews at-risk and building Jewish peoplehood in Israel and around the Jewish world.

d. **PACE and Legacy Funds** - fund both PACE, our Perpetual Annual Campaign Endowment, and Legacy, our ongoing effort to raise unrestricted dollars to care for the community in times of emergency.

5. **Revenue Diversification:** Through the efforts of our Community Grant Writing Team, Beth Margolin and Susan Slabotsky, we have been successful in increasing revenue for the various agencies for this fiscal year 2013-14 by $583,110 with $1 million in requests still pending determination. Since the grant writers began three years ago, their achievement is over $1.7 million on behalf of our agencies.

These steps are only the beginning. We have much more to do. If we continue to work together as a community, we will meet the challenges that lie ahead and become a stronger community in the process.

No Family Stands Alone

As the central address for the Jewish community, the Jewish Federation understands the impact that the economy has on the local Jewish population. Although there has been some improvement in the economy, economic security remains elusive for many community members. Assistance is available through Federation's **Jewish Assistance Network**, which is a coordinated approach among the Jewish communal agencies to address the needs of families and individuals in financial crisis. A single phone number provides access to help. Emergency financial assistance is available to address urgent needs and case managers can help with planning, counseling, resources and referrals. The Jewish Assistance Network can be accessed by calling **(248) 592-2650** or through its website, **jewishdetroit.org/help.**

To ensure that *No Family Stands Alone*, Federation established the Rebecca and Gary Sakwa Challenge Fund in 2008, the Stanley and Judy Frankel Challenge Fund in 2009, the Dan and Jennifer Gilbert Challenge Fund in 2010, the Carolyn and Jim Bellinson Challenge Fund in 2011, the Max M. and Marjorie S. Fisher Foundation Challenge Fund in 2012, the Goodman Family Challenge Fund in 2013 and the Davidson Foundation Challenge Fund in 2014. The largest percentage of the funds raised has been allocated for local needs.

The 2014 State Mental Health Services for Special Populations Line grant to Federation was renewed at $1,995,741 and additional funding of $500,000 was received from the Department of Human Services. These funds help us to support mental health and social welfare services provided by our Jewish communal agencies to vulnerable populations. This funding helps replace discontinued funding from United Way, the government, and private foundation gifts. This remarkable achievement was due to the efforts of the Government Relations Oversight Committee (GROC), chaired by Mark Davidoff and John Jacobs, with the help of Dennis Bernard and Evan Weiner, previous GROC Co-Chairs, and in conjunction with Sandi Lewis and Jon Smalley, Federation's lobbyists with Muchmore, Harrington, Smalley and Associates in Lansing. There is concern about the Line being continued in 2015. GROC continues its joint State government advocacy

efforts with our Arab partners, ACCESS and ACC, to maintain the Line and hopefully increase it.

Planning and Allocations Steering Committee (PASC)

The Planning and Allocations Steering Committee (PASC) makes allocation recommendations to the Federation Board of Governors for local, national, and Israel and overseas agencies. The PASC coordinates and monitors all of Federation's planning and agency relations and activities. Members of the PASC include:

- Immediate past PASC Chair
- Current Planning Division Chairs and Associate Chairs
- Annual Campaign Co-Chairs
- Representatives of the United Jewish Foundation
- Chairs of the Alliance for Jewish Education, Israel and Overseas Committee, Real Estate Committee, Capital Needs Committee and the National Agencies Council.

A special thank you goes to all the PASC members, the Israel and Overseas Committee, the Planning Divisions, and professional staff for all their efforts, hard work, and creative thinking this year in addressing the challenging issues confronting our Jewish community.

Allocations Process

The FY 2014-15 allocation recommendations of the PASC comply with the allocation principles established by the Federation and Foundation Boards:

- Expenditures may not exceed revenue.
- A baseline amount of unrestricted reserves must be maintained.
- Donor, legal and contractual commitments must be fulfilled.
- General Fund reserves should not be used to support allocations or annual Federation operations.

The recommendations also are consistent with the priorities established several years ago by the Federation officers:

- Ensure that there is a safety net of services for those in need in our community.
- Provide a Jewish education for our children and a myriad of experiences to strengthen their Jewish identity.
- Attract and retain our young adults and connect them to the Jewish community.
- Help our older adults maintain their independence and live their lives in dignity.
- Ensure the future vitality of our Jewish community.
- Maintain a Capital Needs Reserve.

Allocation Issues

This has been a challenging year for the community given all of the needs that must be addressed locally and overseas. The Board of Governors approved increased Campaign and Challenge Fund allocation parameters of $425,000 for local agencies and the Federation's operating budget and $125,000 for Israel and Overseas. This was due to a projected increase in the 2014 Campaign and the prior year's overachievement. Based on community priorities, the PASC determined overall Planning Division allocation parameters for FY 2014-15. Planning Divisions determined the specific allocations for local agencies, and the Israel and Overseas Committee determined the allocations for Israeli and overseas agencies.

The proposed allocations for FY 2014-15 of $33,011,000 are based upon the following assumptions:

- A 2014 Campaign achievement of $29,800,000 from the Annual Campaign plus $3,660,000 from the Davidson Foundation Challenge Fund.
- A shrinkage factor of ($780,000). The percentage was reduced from 2.75% to 2.5% based on increased collections and the Finance Committee's recommendation.
- Prior year's overachievement of $300,000.
- Prior years' unallocated overseas funds of $31,000.

The allocations report includes the allocations from the Annual Campaign and the Challenge Fund. The Challenge Fund allocations to local agencies consist of the following three types of grants:

1. **Donor Designations**: These grants are given in accordance with the explicit instructions of the donors to the Challenge Fund.
2. **Challenge Fund Special Grants**: These grants are given to address special high priority needs that cannot be handled by the normal Campaign allocation.
3. **General Grant**: These are Challenge Fund dollars that have been historically added to the funds given to the agencies as part of their "Campaign Allocation."

Local agencies also receive other support from funds raised by Federation, or held by the United Jewish Foundation and invested on behalf of Federation constituent agencies. This support includes State grants, agency endowment distributions, programming endowments, Millennium and other Federation funds, Centennial Funds, and distributions from the Foundation for Our Jewish Elderly.

Urgent Needs Fund

A consideration this year for the PASC in determining the parameters for the Planning Divisions was that the Urgent Needs Fund is approaching the end of its funding cycle. This is a fund that had been created in 2010 with contributions from 10 families to help fund urgent needs during the height of the economic crisis in order to help agencies transition their budgets to a new economic reality without cutting services or being unable to expand services where needed to vulnerable populations. The Urgent Needs Fund has made distributions of approximately $5.15 million to date and has almost reached the end of its available funding. Agencies receiving funds for FY 2014-15 have been notified that this is the last year of these grants from the Urgent Needs Fund.

Distributions from the Urgent Needs Fund in the first three years were made to pay for staff for the JFS Resource/Intake Center, a day school social worker, Project Chessed Coordinator, geriatric case managers, in-home support services, escorted transportation, mental health counselors, employment specialists, financial literacy counselors, in-home support services for older adults, and Jewish day/overnight camping, child day care and religious school scholarships.

Although this funding was initially intended to address "urgent needs," resulting from the economic crisis, the reality is that some of these needs persist even though the economy has improved. Given that the Urgent Needs Fund has only a finite sum of money which will not be replenished, any needs that remain after the Fund has been depleted will require support from the Campaign or the Challenge Fund. Since it would be difficult to absorb all of these needs in one year, last year the PASC decided that it was important to begin transitioning the funding for priority needs and services into the Campaign and Challenge Fund. This would also allow the Urgent Needs Fund to last longer, which would enable it to continue to address new concerns beyond the ability of the Campaign and Challenge Fund. Grants from the Urgent Needs Fund are only made for one year at a time with no guarantee of their continuation.

Last fiscal year, **$345,497** was absorbed into the FY 2013-14 Campaign and Challenge Fund for part of the staffing that had been funded by the Urgent Needs Fund, including intake/resource center staff, case managers, mental health counselors, employment specialists, and financial literacy counselors. For FY 2014-15, the PASC approved a recommendation to absorb into the Campaign and Challenge Fund an additional **$303,178** for staffing that had been funded by the Urgent Needs Fund including a Project Chessed Coordinator for a few months (until all the clients are transitioned to permanent health care), an Escorted Transportation driver, mental health counselors, an employment specialist for workers ages 50+ and some scholarship funding.

The Jewish Community Center

Due to serious fiscal issues at the Jewish Community Center, the Federation and Foundation allocated emergency funds to enable the JCC to continue its operations and pay vendors. Leadership appointed two task forces, a Financial Oversight Committee and a JCC Futures Committee. The latter committee's charge is to study other successful JCC

models operating nationwide to identify best practices that should be considered in Detroit, develop a sustainable business model, conduct a search process for the next JCC CEO and recommend to Federation/Foundation the appropriate level of support for the JCC. It is anticipated that the Futures Committee will complete its work by the end of the calendar year. In the interim, under the supervision of the Financial Oversight Committee, Financial One is handling the JCC's accounting functions and an interim CEO, Jim Issner, is running its operations and implementing necessary restructuring.

Local Allocations

The PASC recommends an overall allocation of **$22,029,122 ($19,317,222** from the Annual Campaign and **$2,711,900** from the Challenge Fund) to support services and programs provided through 17 local agencies and Federation. Local allocations include:

1. **$3,736,943** for Jewish Education.

2. **$2,807,091** for Jewish Identity Building.

3. **$5,442,620** for Community Services (Advocacy and Aid to At-Risk Populations).

The above total allocations include **$2,711,900** that will be distributed from the Challenge Fund to support our agencies' work and local emergency needs. The allocations include:

- **Donor Designations**: **$488,300**

- **Challenge Fund Special Grants**: **$593,101** for priority services to vulnerable populations

- **General Grant**: **$1,630,499** prorated among the local agencies to support their vital programs and services benefitting our community members

The above distributions are aggregated for each agency in the Challenge Fund column in Attachment III in this book.

In addition to the local allocations specified above, the following additional allocations were made:

1. **$1,070,000** for the Capital Needs Reserve, which provides grants to local agencies for equipment replacements and facility repairs.

2. **$223,900** for community security needs.

3. **$3,900,000** for rent grants to the agencies occupying space owned by the United Jewish Foundation. Each agency occupying space owned by the United Jewish Foundation is required to pay the fair market value of the rent. In turn, Federation is providing an allocation to the agencies to pay this rent. UJF will then give the

Federation an allocation for the amount of the rent collected. This creates greater financial transparency.

4. **$4,370,768** for support services, various program costs, fund guarantees and contractual services for a number of funds that provide support to local agencies, such as selected Millennium Funds, and financing obligations related to various facilities constructed in recent years. These funds also contribute towards Campaign expenses, some designations, and the Federation operating budget, a portion of which supported fundraising efforts in FYE 5/31/14 of approximately $69.4 million beyond the Annual Campaign to assist local agencies and programs.

National Allocations

$1,458,748 is recommended to support Birthright Israel, 10 national agencies, national central services and for Jewish Federations of North America dues.

Israel and Overseas Allocations

The Federation continues to give high priority in its overseas allocations to programs that address underserved families and youth, and has been supporting initiatives to help reduce the education and opportunity gaps that exist within Israeli society. While economic conditions in Israel have improved overall in recent years, the rise in living standards has not been enjoyed by everyone. Approximately 1.8 million Israelis live in poverty, and 39% struggle to live on their current income. The government estimates that 15% of all Israeli youth, approximately 350,000 children, are at- risk. While unemployment is relatively small, the government estimates that 22% of adults between the ages of 25 – 64 are not in the work force. These figures are even more striking in the "peripheries" of the country, including the Central Galilee and Netanya, where most of Detroit's activity is focused.

Beyond addressing urgent needs, priority is also given to funding programs that connect Israel to the Detroit Jewish community, on a person-to-person basis. These programs are largely situated in the community's Partnership Together Region in the Central Galilee. They provide a personal face to programs supported by Detroit, and help promote Jewish identity and the connection between our local Jewish community and the Federation. There is currently a broad spectrum of Israel visits and exchanges, starting with the Israeli Camper Program at Camp Tamarack, the bi-annual Teen Mission and Community Birthright and progressing to a wide offering of adult missions that have resulted in life-changing exchanges and long-lasting relationships with Israelis, as well as with their fellow Detroiters.

The Federation's Israel and Overseas Committee (IOC), chaired by Beverly Liss and Jeff Schlussel, oversees all the Federation's overseas allocations and grants. This year, the IOC recommended a total 2014 Campaign overseas allocation of **$9,523,130** which includes:

- **$8,077,130** from the 2014 Campaign,
- **$900,000** from the Davidson Foundation Challenge Fund,
- **$515,000** from the Federation Operating Budget, and
- **$31,000** from accumulated prior years' unspent allocated funds.

The IOC utilizes the following criteria in recommending allocations and grants:

1. Grants should be coordinated with other government and private funding, with priority given to those programs that can leverage other funding support.
2. Funded programs should have a business plan, including an "exit strategy" for Detroit's funding and a plan to sustain support once it ends.
3. Each program should have identified and measurable goals.

Campaign allocations are broken down into 3 categories, other than Challenge Fund Donor Designations: (1) "Core" allocations, which are Detroit's portion of its collective responsibility with all North American Federations to support basic overseas needs, (2) "Elective," which are community designated projects and (3) programs and services administered through our Federation Israel office.

- Core allocations are provided through the Jewish Agency for Israel (JAFI), the American Joint Distribution Committee (JDC), ORT, and Detroit's support for the Jewish Federations of North America (JFNA). Core funding is not directed to specific programs, but rather is Detroit's contribution toward global needs and is combined with the support raised from 155 other Federations in North America. It is used to address primary collective needs, such as assisting the Jewish elderly across the Former Soviet Union, aliyah and immigrant absorption services in Israel, Jewish identity enhancing programs which connect Jews to one another, and aid to vulnerable populations in over 70 countries throughout the world. Core funding also enables these agencies to respond to emergencies when they arise. The IOC is recommending increasing its core allocation as a show of support for the important work our overseas agencies do, and to enhance their ability to address emergency situations which occur in distressed parts of the world.

- Detroit's "elective funding" supports specific projects which address compelling needs around the world. It also helps build support within Detroit for getting the community involved in the Federation, specifically through its overseas agenda. Most of Detroit's "elective funding" supports programs that address the needs of children and families at-risk, primarily in the Central Galilee, Netanya and Kiev in the former Soviet Union. Almost all of the Federation's grants are multiple year allocations, reviewed annually, each with a business plan that includes exit strategies. New projects are funded from reduced support to other programs as they mature. Priority is given to projects that leverage other private or public funds for

maximum impact and future sustainability. This year the elective programs, totaling $1,232,000 in support from Detroit, will receive over $2 million of additional support from private donors, Israeli government ministries, and local municipalities. The new initiatives being recommended this year include:

1) The Detroit-Israel Connection - a series of activities which expand engagement between young adults in Detroit and their peers in Israel, and which develop a core of leadership to promote and cultivate a stronger future Detroit-Israel relationship.

2) Revadim: A Municipal Intervention Project - a total school improvement program in Nazareth Illit, funded in partnership with the Rashi Foundation, to address the educational and emotional needs of individual students in 7 elementary schools.

3) JDC TEVET Employment Program - A JDC program assisting Haredi men and women prepare for employment.

- As part of the Board's review of the Federation's Operating Budget, $515,000 was approved for the Israel offices in Detroit and Jerusalem. The Israel and Overseas Department supports Federation's missions to Israel and around the world, its local programming that promotes a connection between Detroit and Israel, and its various people-to-people exchange activities. This past year, the Department organized 13 different exchanges and/or visits to the Partnership Region involving 400 people going back and forth from Detroit to Israel. Another 21 exchanges are scheduled for next year, projected to involve 770 people. A special focus in the coming year is being given to outreach and engagement of Detroit youth and young adults, ages 13-26 residing in Detroit or Israel, through a broad continuum of Israel experiences.

Allocations Tables

- Allocations Summary
- Israel and Overseas – Attachment I
- National Agencies – Attachment II
- Local Agencies – Attachment III
- Notes

SUMMARY

JEWISH FEDERATION OF METROPOLITAN DETROIT
PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS
FISCAL YEARS ENDING MAY 31, 2014 AND 2015

	FYE MAY 31, 2014			FYE MAY 31, 2015				INCREASE (DECREASE)		
	2013 Annual Campaign	Challenge Fund	TOTAL	2014 Annual Campaign	Challenge Fund	TOTAL		Annual Campaign	Challenge Fund	TOTAL
CAMPAIGN ACHIEVEMENT										
Annual Campaign and Challenge Fund	29,500,000	3,900,000	33,400,000	29,800,000	3,660,000	33,460,000		300,000	(240,000)	60,000
Shrinkage Allowance	(811,250)	(45,000)	(856,250)	(745,000)	(35,000)	(780,000)	1	66,250	10,000	76,250
Prior Year's Overachievement	-	-	-	300,000	-	300,000		300,000	-	300,000
Prior Years' Unallocated Funds (Overseas)	-	-	-	31,000	-	31,000	2	31,000	-	31,000
Use of Undesignated Bequests	-	-	-	-	-	-		-	-	-
TOTAL CAMPAIGN ACHIEVEMENT	28,688,750	3,855,000	32,543,750	29,386,000	3,625,000	33,011,000		697,250	(230,000)	467,250
CAMPAIGN ALLOCATIONS										
Israel and Overseas - Per Attachment I	8,467,130	650,000	9,117,130	8,623,130	900,000	9,523,130	3	156,000	250,000	406,000
National Agencies - Per Attachment II	1,445,648	86,000	1,531,648	1,445,648	13,100	1,458,748		-	(72,900)	(72,900)
Local Agencies - Per Attachment III										
Jewish Education	3,228,280	533,728	3,762,008	3,248,280	488,663	3,736,943		20,000	(45,065)	(25,065)
Jewish Identity Building	2,325,094	495,711	2,820,805	2,316,520	490,571	2,807,091		(8,574)	(5,140)	(13,714)
Community Services (Aid/Advocacy to At-Risk Populations)	4,179,180	1,118,191	5,297,371	4,187,754	1,254,866	5,442,620		8,574	136,675	145,249
Additional Local Support	9,043,418	971,370	10,014,788	9,564,668	477,800	10,042,468	4	521,250	(493,570)	27,680
Total Local Agencies	18,775,972	3,119,000	21,894,972	19,317,222	2,711,900	22,029,122		541,250	(407,100)	134,150
TOTAL CAMPAIGN ALLOCATIONS	28,688,750	3,855,000	32,543,750	29,386,000	3,625,000	33,011,000		697,250	(230,000)	467,250

ATTACHMENT I - ISRAEL AND OVERSEAS

JEWISH FEDERATION OF METROPOLITAN DETROIT

PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS

FISCAL YEARS ENDING MAY 31, 2014 AND 2015

	FYE MAY 31, 2014			FYE MAY 31, 2015				INCREASE (DECREASE)		
	2013 Annual Campaign	Challenge Fund	TOTAL	2014 Annual Campaign	Challenge Fund	TOTAL		Annual Campaign	Challenge Fund	TOTAL
CORE ALLOCATIONS										
JAFI, JDC, and ORT	6,826,130	-	6,826,130	6,876,130	-	6,876,130		50,000	-	50,000
TOTAL CORE ALLOCATIONS	6,826,130	-	6,826,130	6,876,130	-	6,876,130		50,000	-	50,000
ELECTIVE ALLOCATIONS										
Partnership Together Central Galilee	635,000	-	635,000	635,000	-	635,000		-	-	-
I&O Dept./NEXTGen "Detroit-Israel" Connection	-	-	-	40,000	-	40,000		40,000	-	40,000
Early Childhood Interventions - Netanya	75,000	85,000	160,000	100,000	-	100,000	5	25,000	(85,000)	(60,000)
ORT SmartBoards/Nazareth Ilit	-	40,000	40,000	-	-	-	5	-	(40,000)	(40,000)
Municipal Intervention Partnership - Nazareth Illit	-	-	-	100,000	-	100,000		100,000	-	100,000
JDC TEVET Employment Centers	-	-	-	50,000	-	50,000		50,000	-	50,000
Youth Futures	120,000	-	120,000	100,000	-	100,000	5	(20,000)	-	(20,000)
Better Together	46,000	-	46,000	35,000	-	35,000	5	(11,000)	-	(11,000)
Israel Terror Fund	72,000	-	72,000	-	-	-		(72,000)	-	(72,000)
FSU Hunger Relief/Kiev Hesed	160,000	-	160,000	160,000	-	160,000		-	-	-
Szarvas Subsidies	6,000	-	6,000	12,000	-	12,000		6,000	-	6,000
TOTAL ELECTIVE ALLOCATIONS	1,114,000	125,000	1,239,000	1,232,000	-	1,232,000		118,000	(125,000)	(7,000)
ISRAEL AND OVERSEAS SERVICES	515,000	-	515,000	515,000	-	515,000		-	-	-
CHALLENGE FUND DESIGNATIONS	-	518,140	518,140	-	900,000	900,000	6	-	381,860	381,860
UNALLOCATED	12,000	6,860	18,860	-	-	-		(12,000)	(6,860)	(18,860)
TOTAL ISRAEL AND OVERSEAS	8,467,130	650,000	9,117,130	8,623,130	900,000	9,523,130		156,000	250,000	406,000

ATTACHMENT II - NATIONAL AGENCIES

JEWISH FEDERATION OF METROPOLITAN DETROIT
PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS
FISCAL YEARS ENDING MAY 31, 2014 AND 2015

	FYE MAY 31, 2014			FYE MAY 31, 2015			INCREASE (DECREASE)		
	2013 Annual Campaign	Challenge Fund	TOTAL	2014 Annual Campaign	Challenge Fund	TOTAL	Annual Campaign	Challenge Fund	TOTAL
JFNA Dues	957,832	-	957,832	957,832	-	957,832	-	-	-
Birthright Israel	211,790	86,000	297,790	211,790	13,100	224,890	-	(72,900)	(72,900)
National Federation Agency Alliance	239,605	-	239,605	239,605	-	239,605	-	-	-
Additional National Agencies									
American Jewish Committee	10,875	-	10,875	10,875	-	10,875	-	-	-
Anti-Defamation League	10,875	-	10,875	10,875	-	10,875	-	-	-
Total Additional National Agencies	21,750	-	21,750	21,750	-	21,750	-	-	-
National Central Services	14,671	-	14,671	14,671	-	14,671	-	-	-
Total National Agencies	1,445,648	86,000	1,531,648	1,445,648	13,100	1,458,748	-	(72,900)	(72,900)

ATTACHMENT III - LOCAL AGENCIES

JEWISH FEDERATION OF METROPOLITAN DETROIT
PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS
FISCAL YEARS ENDING MAY 31, 2014 AND 2015

	FYE MAY 31, 2014			FYE MAY 31, 2015				INCREASE (DECREASE)		
	2013 Annual Campaign	Challenge Fund	TOTAL	2014 Annual Campaign	Challenge Fund	TOTAL	7	Annual Campaign	Challenge Fund	TOTAL
JEWISH EDUCATION										
Akiva Hebrew Day School	363,340	77,004	440,344	363,340	73,664	437,004		-	(3,340)	(3,340)
Frankel Jewish Academy	111,840	43,975	155,815	111,840	33,475	145,315		-	(10,500)	(10,500)
Hillel Day School	495,580	113,549	609,129	495,580	112,324	607,904		-	(1,225)	(1,225)
Yeshiva Beth Yehudah	651,641	158,908	810,549	651,641	133,908	785,549		-	(25,000)	(25,000)
Yeshiva Gedolah	95,364	19,597	114,961	95,364	19,597	114,961		-	-	-
Yeshivas Darchei Torah	189,499	38,940	228,439	189,499	38,940	228,439		-	-	-
Alliance for Jewish Education	947,500	-	947,500	967,500	-	967,500		20,000	-	20,000
Congregational School Funding	373,516	81,755	455,271	373,516	76,755	450,271		-	(5,000)	(5,000)
TOTAL JEWISH EDUCATION	3,228,280	533,728	3,762,008	3,248,280	488,663	3,736,943		20,000	(45,065)	(25,065)
JEWISH IDENTITY BUILDING										
BBYO	58,652	11,436	70,088	58,652	11,436	70,088		-	-	-
Fresh Air Society/Tamarack Camps	409,864	83,198	493,062	409,864	83,198	493,062		-	-	-
Hillel Foundations										
HCAM/EMU Hillel Reserve	56,332	14,144	70,476	-	-	-		(56,332)	(14,144)	(70,476)
Hillel of Metro Detroit	140,709	27,977	168,686	140,709	27,477	168,186		-	(500)	(500)
MSU Hillel	136,782	28,108	164,890	136,782	28,108	164,890		-	-	-
HCAM	-	-	-	47,758	-	47,758		47,758	-	47,758
Michigan Hillel at University of Michigan	137,310	27,703	165,013	137,310	27,703	165,013		-	-	-
Jewish Community Center	1,226,763	278,386	1,505,149	1,226,763	253,886	1,480,649		-	(24,500)	(24,500)
JCC Scholarships	15,000	21,691	36,691	15,000	32,695	47,695	8	-	11,004	11,004
JCC Activities Coordinator	14,932	3,068	18,000	14,932	3,068	18,000		-	-	-
Kids All Together (JCC)	18,750	-	18,750	18,750	23,000	41,750		-	23,000	23,000
Mission Subsidies	110,000	-	110,000	110,000	-	110,000		-	-	-
TOTAL JEWISH IDENTITY BUILDING	2,325,094	495,711	2,820,805	2,316,520	490,571	2,807,091		(8,574)	(5,140)	(13,714)

ATTACHMENT III - LOCAL AGENCIES

JEWISH FEDERATION OF METROPOLITAN DETROIT
PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS
FISCAL YEARS ENDING MAY 31, 2014 AND 2015

	FYE MAY 31, 2014			FYE MAY 31, 2015				INCREASE (DECREASE)		
	2013 Annual Campaign	Challenge Fund	TOTAL	2014 Annual Campaign	Challenge Fund	TOTAL	7	Annual Campaign	Challenge Fund	TOTAL
COMMUNITY SERVICES (Aid/Advoc. To At-Risk Populations)										
Hebrew Free Loan	108,731	23,042	131,773	108,731	38,042	146,773		-	15,000	15,000
Hebrew Free Loan (Student Loans)	19,013	3,907	22,920	19,013	3,907	22,920		-	-	-
Jewish Community Relations Council	266,371	54,737	321,108	266,371	54,737	321,108		-	-	-
Jewish Family Service	1,648,200	378,300	2,026,500	1,648,200	338,175	1,986,375		-	(40,125)	(40,125)
Jewish Family Service Staffing Grant	257,783	214,715	472,498	311,357	373,315	684,672	8	53,574	158,600	212,174
Jewish Family Service Financial Assistance	297,500	-	297,500	187,500	-	187,500	8	(110,000)	-	(110,000)
Jewish Family Service Housing Assistance	42,000	8,500	50,500	42,000	8,500	50,500		-	-	-
Jewish Senior Life	390,106	80,897	471,003	390,106	84,097	474,203		-	3,200	3,200
JVS	811,708	166,801	978,509	811,708	171,801	983,509		-	5,000	5,000
JVS Staffing Grant	88,579	182,292	270,871	153,579	182,292	335,871	8	65,000	-	65,000
In-Home Support Services (JSL and JFS)	18,750	-	18,750	18,750	-	18,750		-	-	-
Foundation for Our Jewish Elderly	230,439	5,000	235,439	230,439	-	230,439	9	-	(5,000)	(5,000)
TOTAL COMMUNITY SERVICES	4,179,180	1,118,191	5,297,371	4,187,754	1,254,866	5,442,620		8,574	136,675	145,249
ADDITIONAL LOCAL SUPPORT										
Community Security Program	213,000	-	213,000	223,900	-	223,900		10,900	-	10,900
Other Community Programs	492,500	-	492,500	718,725	-	718,725		226,225	-	226,225
Next Generation Engagement	207,000	1,900	208,900	211,300	16,000	227,300		4,300	14,100	18,400
Michigan Jewish Conference	55,000	-	55,000	55,000	-	55,000		-	-	-
Pathways to Community Leadership	-	15,000	15,000	-	-	-		-	(15,000)	(15,000)
Community Voting Exercise	-	-	-	-	50,000	50,000	10	-	50,000	50,000
Support Services	1,985,600	-	1,985,600	1,924,175	-	1,924,175	11	(61,425)	-	(61,425)
Agency Support to Cover Rent for UJF Facilities	3,900,000	-	3,900,000	3,900,000	-	3,900,000	12	-	-	-
Campaign and Interest Expenses	80,318	-	80,318	91,568	-	91,568	13	11,250	-	11,250
Capital Needs Reserve Grant	995,000	-	995,000	1,070,000	-	1,070,000		75,000	-	75,000
Agency Fund Guarantees and Loan Obligations	1,105,000	-	1,105,000	1,360,000	-	1,360,000	14	255,000	-	255,000
Challenge Fund Designations	10,000	954,470	964,470	10,000	411,800	421,800		-	(542,670)	(542,670)
TOTAL ADDITIONAL LOCAL SUPPORT	9,043,418	971,370	10,014,788	9,564,668	477,800	10,042,468		521,250	(493,570)	27,680
TOTAL LOCAL AGENCIES	18,775,972	3,119,000	21,894,972	19,317,222	2,711,900	22,029,122		541,250	(407,100)	134,150

NOTES

1 Shrinkage factor (2.5% - reduced from 2.75% last year) for Annual Campaign and Challenge Fund pledges as determined by Federation's Finance Committee. The percentage was reduced this year based on increased collections and the Finance Committee's recommendations.

2 In 2009, the Israel & Overseas Committee (IOC) created a contingency fund for multiple year program commitments to "cushion" overseas programs from potential allocation reductions and to help seed new programs. After the use of $31,000 for FYE 5/31/15, $54,000 remains in the Fund.

3 Includes costs related to Israel & Overseas services, both in Israel and Detroit. The Boards approved an overseas allocation parameter that helps offset the loss of unrestricted gifts to the 2014 Challenge Fund, allowing the same level of overseas funding as was approved the prior year.

4 Includes Federation's operating budget (support services and direct program costs), and other local support for agencies.

5 Funding reduced based on prior year's arrangements with agencies.

6 Designated beneficiaries include specific JDC and JAFI programs, the Israeli Camper Program at Tamarack, Naomi Treatment Center, Community Birthright, Atidim, Hadassah Hospital, the Dov Lautman Center and selected missions.

7 Challenge Fund dollars include: (1) donor designations, (2) general allocations to agencies, and (3) special grants.

8 JFS obtained additional resources for emergency financial assistance enabling the Campaign allocation to be reduced by $110,000. This savings plus additional funding from the Challenge Fund enabled $303,178 to be allocated as special grants for the next fiscal year in order to continue to absorb services that had previously been funded by the Urgent Needs Bridge Fund. This is a special fund put together by a few families in the community who wanted to help the agencies meet the increased needs of families and individuals in crisis due to the downturn in the economy. The Fund had enough funding to provide support for five years, which is now ending. Even though the economy has improved, many of the "urgent needs" funded by the Urgent Needs Fund have become the "new normal," and funding is required to continue the vital programs and services that address these needs. Last year, $335,497 in special grants helped fund case managers, mental health counselors, intake/resource center staff, employment specialists and financial literacy counselors. This fiscal year, the additional funds ($303,178) will be used for a Project Chessed Coordinator, an Escorted Transportation driver, mental health counselors, employment specialist for workers ages 50+ and JCC scholarships.

9 Distribution to the Foundation for Our Jewish Elderly to enable older adult services supported by these restricted funds (in-home support services, escorted transportation and adult day care) to be maintained at current levels.

10 The Jewish Detroit Votes $50,000 allocation was divided as follows: 33% to Our Family, 16% to Our Future, 13% to Our Homeland, 21% to Our Knowledge, and 17% to Our Spirit, with the agencies and programs in each of these categories sharing equally in the amount allocated.

11 Costs related to Federation/Foundation operating budget, net of management fees and direct income. These expenses support annual initiatives that helped raise an additional $69,400,000 for local programs beyond the Annual Campaign, including (a) $54,800,000 for Support Foundations and Philanthropic Funds, (b) $12,300,000 for Restricted Funds and Planned Giving Vehicles, and (c) $2,300,000 for PACE Funds.

12 Agencies occupying United Jewish Foundation (UJF) owned space are required to pay the fair market value of the rent. In turn, Federation is providing an allocation to the agencies to pay this rent. UJF will then give the Federation an allocation for the amount of the rent collected.

13 Interest charges and costs related to credit card fees.

14 Net cost of fund guarantees and loan obligations supporting local agencies.

An answer for those who need help.

Jewish Assistance NETWORK

The Jewish Assistance Network is a unique initiative that combines the strengths of Federation's agency partners, and other Jewish communal organizations, to provide a coordinated system of services for those in need. Since its founding in 2008, the Jewish Assistance Network has helped thousands of individuals and families successfully conquer life's challenges. With one simple phone call you can access a broad range of services to fit your specific needs.

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