

Planning & Allocations Report

June 1, 2020 – February 28, 2021



Jewish Federation
OF METROPOLITAN DETROIT

Planning & Allocations Report

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Our Vision

Federation is the heart and soul of the local Detroit Jewish community's philanthropic and humanitarian activities. We endeavor to build and strengthen Jewish community and be the one place that belongs to every Jew – where philanthropy, volunteerism and shared commitment come together to make a difference, to repair the world.

Locally, Federation supports a family of 17 Jewish agencies and schools across Metropolitan Detroit. Working with our global partners, Federation impacts the lives of hundreds of thousands of Jews throughout Israel and in countries around the world.

Through Federation's Annual Campaign (Campaign) and Challenge Fund, we raise and allocate funds to provide lifesaving and life-enhancing humanitarian assistance to those in need, including seniors, the disabled, the unemployed and other individuals and families. Federation also works to translate Jewish values into social action and to provide avenues for Jewish education, engagement and enrichment.

Besides the Campaign and Challenge Fund, local agencies receive significant support from funds raised by Federation, or held by the United Jewish Foundation (Foundation), and invested on each agency's behalf. These funds include state and other grants, agency endowment distributions, programming endowments, Millennium funds, Centennial Funds, distributions from the Foundation for our Jewish Elderly, and other Federation funds. *(See Attachment VI following the Allocation Tables.)*

There are many ways to contribute to Federation and support the Jewish community. We are all one and the strength and longevity of Jewish Detroit, and the Jewish people, depends on everyone's participation.

The Year In Review

In fiscal year 2019-20, more than **\$36,000,000** from the Annual Campaign and the Lisa and Gary Shiffman Challenge Fund was allocated to our local, national, and Israel and overseas agencies to address a variety of priorities, including community security, Jewish education, Jewish identity-building experiences, care for our most vulnerable populations and strategic initiatives. Here is a brief overview of our efforts in these areas:

- **Community Security.** In the wake of rising Anti-Semitism, Federation has continued to adopt new and enhanced measures to protect and secure the local Jewish community. A community-wide security assessment provided the basis for our strategy and this past year more than **\$1,200,000** was allocated specifically for security. To date, physical structures have been target-hardened and additional security personnel are both on site and patrolling our agency buildings and campuses.

- **Jewish Education.** Ensuring ongoing Jewish education remains one of Federation’s top priorities. This year more than **\$3,100,000** was allocated from the Campaign and Challenge Fund for scholarship assistance and so our schools and congregations could provide a high level and innovative education to more than 2,600 young people. By using technology and “experiential education” we are providing the kids in our community with a view into Judaism that is both comprehensive and impactful.
- **Jewish Identity Building and Advocacy.** From our campus Hillels and Tamarack Camps to the Jewish Community Center, BBYO and JCRC/AJC, these organizations are at the forefront helping community members begin or extend their Jewish journeys and advocate for our Jewish future. Over the course of the year – through innovative programs, leadership experiences, trips to Israel and so much more – their work has ensured greater engagement in Jewish life and the longevity of our Jewish community. In fiscal year 2019-20, more than **\$4,600,000** was allocated to these agencies.
- **Care for Vulnerable Populations.** Perhaps our greatest obligation as Jews is to take care of those who are less fortunate than we are. Last year, more than **\$5,900,000** was allocated to Hebrew Free Loan, Jewish Family Service, Jewish Senior Life and JVS Human Services to provide interest-free loans, emergency financial assistance, mental health services, housing for seniors, food, programs for people with disabilities, career counseling, and so much more. These critical supports helped roughly 11,000 people in dire straits improve their personal situation so they could live a more comfortable and meaningful life.
- **Strategic Community Initiatives.** Federation has made great progress on three important strategic community initiatives we’ve been working on:
 - **Collaboratory.** One of Federation’s core attributes is working in partnership with Jewish agencies throughout the community to ensure that programs and services are delivered as efficiently and impactfully as possible. This year a group of Jewish social service agencies came together in a “Collaboratory” to investigate how deeper alignment, greater use of technology and physical plant changes might be beneficial for community members. With funding from the Campaign and The Jewish Fund, these agencies engaged in a facilitated process that will continue in the year ahead.
 - **JHELP.** Launched in 2019, JHELP offers a single connection point for those seeking support. With one call or visit to our site, community members will be connected to the Resource Center at Jewish Family Service via email or online chat, where professionals stand ready to assist. Staff respond and coordinate follow-up activities in conjunction with Jewish agencies throughout the community. This year more than 550 community members utilized JHELP for assistance.

- **Youth Mental Health Programming.** Last year Federation continued to offer important mental health-related trainings and programming as part of *We Need to Talk*, our community-wide youth mental health initiative. With funding from the Annual Campaign, donors and local foundations, we're working closely with our partners throughout the community to promote mental wellness and reduce stigma, which too often prevents people from getting help. As of May, 2020, almost 780 participants had completed safeTALK and ASIST suicide awareness training and thousands more had attended a *We Need to Talk* event or visited the *We Need to Talk* website. Suicide attempt survivor Kevin Hines and mental health advocate – and former University of Michigan football player – Will Heininger were two key speakers during the year.

Managing the COVID-19 Pandemic

Despite our efforts during the year, the communal landscape of Jewish Detroit has changed dramatically in the last several months. The COVID-19 pandemic has created a series of immediate challenges and long-term concerns for each agency, whether it operates in the Jewish education, Jewish identity or community services space.

In the early days of the pandemic, Federation launched a COVID-19 Emergency Campaign to address the financial crisis in the community stemming from the coronavirus. An Emergency Task Force was assembled to oversee the Emergency Campaign, manage the allocation of resources and strategically address related concerns confronting our community agencies and organizations. Thanks to the exceptional generosity of individual donors and foundations, more than **\$7,300,000** has been raised. These funds are helping to ensure that:

- Front line workers have adequate personal protective equipment.
- Seniors, people who are homebound and those who are most at risk, and should not be out shopping for food, are provided healthy Kosher meals.
- Jewish day schools have the financial resources to continue operations even though they are experiencing a decline in tuition payments.
- The buildings where our most vulnerable populations live are sprayed with disinfectant that protects against the spread of the coronavirus.
- Agencies have the ability to stockpile shelf-stable foods.

The human needs impact of COVID-19 will last long after life returns to normal. Unfortunately, however, we do not know how much funding we will need to care for the community. In an effort to provide a consistent level of support to our agencies despite the financial uncertainty of the current crisis, the joint Federation and Foundation Boards voted to close the 2020 Annual Campaign as of March 31, 2020, and to allocate for the nine months starting June 1, 2020, the **\$28,800,000** million dollars raised to date through the Campaign and Challenge Fund.

In addition, the 2021 Campaign – and all future Campaigns – will begin in September and end in May with allocations distributed from March 1 through February 28.

This new Campaign calendar will allow Federation to position the majority of the Campaign ahead of the allocations process and establish more certainty between raised and allocated funds. It also allows us to shorten the Campaign year which will allow for sharper focus throughout the Campaign period.

Looking Forward

The COVID-19 pandemic is affecting us all, albeit in different ways. Some are ill, others are isolated and many individuals and families are facing financial challenges that show little sign of improving anytime soon. Unfortunately, the negative impact of the pandemic will be with us for many months, if not years, to come.

Although our future is more uncertain now than at any other time in our lives, some urgent needs have emerged that can guide our planning and how we consider future allocations.

- **Personal Protective Equipment (PPE).** For all of us, and especially workers on the front lines providing direct support, PPE is vital to keep them from contracting the coronavirus. PPE will likely be an ongoing and significant expense. We will need to be flexible in our sourcing since pressure on the supply chain impacts the number of units that can be ordered, pricing and how long it takes for PPE to ship and then arrive.
- **Emergency Financial Assistance.** Because of COVID-19, roughly a quarter of Michigan's workforce is under-employed or unemployed. While governmental benefits provide some short-term assistance and some mortgage holders, utility companies and student loan providers, among others, allow people to suspend payments temporarily, this won't last until the end of the pandemic. A growing number of community members will require emergency financial assistance to ensure they can pay bills for housing, food, medication and other vital needs.
- **Tuition Assistance.** With so many families facing a change in their financial status, far fewer have the resources to cover the costs of day school tuition. Almost from the moment the pandemic began, schools have been fielding calls from parents requesting tuition relief. This puts significant pressure on the schools as they re-work curricula for the virtual world, make sure all students have internet access and continue to provide educational services.
- **Mental Health Services.** Many experts suggest a lasting outcome of COVID-19 will be a significant increase in the number of people suffering from mental illness. For those already struggling with anxiety, confinement to their home and dealing with tremendous uncertainty can be excruciating. Seniors who are alone—including our

Holocaust survivors—are experiencing the painful effects of prolonged isolation. When life does finally return to some semblance of normalcy, we should not expect those struggling with mental illness to suddenly improve. Many will face a long road ahead, requiring significant mental health interventions and services.

Local Allocations

The challenges and uncertainty created by COVID-19 made the work of the Local Agency Planning Division (LAPD) particularly difficult this cycle. In approaching the allocations process for the upcoming nine months, the LAPD sought to balance three important factors:

1. While we are living in uncertain times, agencies need some consistency in their allocation to plan effectively.
2. Base allocations should not be automatically offset by funding an agency receives through the Emergency Campaign.
3. To the extent possible, funding should be set aside for unforeseen circumstances that occur in the months ahead.

In total, the LAPD recommends a nine-month allocation of **\$5,312,488** for agencies in the Jewish Education and Identity Division, **\$4,207,981** for agencies in the Community Services Division and **\$10,968,002** in additional local support. Of this amount, **\$18,138,471** comes from the Annual Campaign and **\$2,350,000** from the Levy-Weiner Challenge Fund. (*See Attachments III and IV for a summary of local allocations.*)

Recognizing that base allocations had not been raised in many years, this year's parameters included a **\$300,000** increase to annual agency base allocations. This increase will be preserved over the coming nine months at 76 percent. After reviewing each agency's situation and their short term and anticipated longer-term needs, the LAPD maintained each agency's base allocation at last year's levels. The additional **\$300,000** for base allocations was then split, with schools receiving funding per capita and the social service agencies receiving funding at the discretion of the committee.

For the past several years, the LAPD has been funding specific agency-related urgent needs with extra dollars that are available through the Annual Campaign. This year, however, there is tremendous uncertainty. The needs of our agencies today could be very different in the future. For that reason, the LAPD is recommending that **\$741,189** in additional allocations be held back for distribution at a later date. The division plans to continue assessing community needs and distribute these dollars as those needs become clearer.

The combination of money raised, and a shorter allocations cycle provide for an allocation increase on a month-to-month basis over the following nine months, when compared to last year. We hope these dollars will give our agencies greater flexibility as they navigate their way through the COVID-19 pandemic.

Israel and Overseas Allocations

The Israel and Overseas Committee (IOC) recommends **\$6,822,053** to support programs and services provided through the Federation's overseas agencies for the nine month period, June 1, 2020 through February 28, 2021. From this amount **\$6,368,053** comes from the 2020 Annual Campaign and **\$433,000** consists of donor designated contributions for specific programs through the Levy-Weiner Challenge Fund. *(See Attachment I for a summary of the Israel and Overseas allocations.)*

Historically, Federation has played a leadership role in advocating on behalf of world Jewry and addressing the needs of Jews living in Israel and around the world. Detroit's global connection to world Jewry is one of its unique characteristics, and one of its most attractive features to engage local participation in the Federation's work.

Federation's overseas allocations assist those in Israel and in overseas Jewish communities who are the most vulnerable – the elderly, those with special needs, at-risk youth and those most disadvantaged. The global coronavirus pandemic has affected these populations most. Support has been included in this year's recommendations to assist the American Joint Jewish Distribution Committee (JDC) provide home care to isolated older adults living in Ukraine, where there is no government or public safety net. Assistance also helps make possible the delivery of food packages and the distribution of medicines. Continued support, matched by the Israeli government, has also been recommended to support the Ethiopian National Project (ENP) to upgrade learning opportunities for 148 Ethiopian middle and high school children through tutoring and after-school support. ENP reports that 82% of the Ethiopian participants met the requirements for matriculation compared with 71% of the national average among those children living in Hebrew speaking homes.

In addition to caring for vulnerable Jewish populations, the overseas allocation supports efforts that build Jewish identity and a connection to Israel and other Jewish communities. Federation's overseas allocation to the Jewish Agency for Israel (JAFI) provides our community with a Community Shaliach, who brings a personal Israeli presence to the community, and deepens Detroiters' understanding and connection to Israel. Her work during this past year has been augmented by Detroit hosting a "Shin Shinim" program, bringing four Israeli teens from Detroit's Partnership Region to spend a year in our community, before they enter the IDF. These young adults have been deployed in several of Detroit's Jewish agencies and synagogues. Even though their stay this year was cut short due to the pandemic, they have continued to play an integral role remotely with many of the community's on-line programs. Funding has been recommended to bring a new cohort 4 of Shin Shinim to Detroit next year.

The Federation always attempts to be strategic with its resources, creating partnerships with both the program providers, with local municipalities and with area residents. The Israeli government, and its funding mechanisms, are frequently bureaucratic and often politicized. Federation allocations are used to help fill the gaps and to incubate new approaches, ultimately

leading to systemic change. Examples in past years have included: PACT – Netanya, Youth Futures and Hanoach, to name only a few.

The 2020 Campaign Overseas Allocation includes additional support to address the emergency needs in Israel and in other overseas Jewish communities, beyond what is provided through government support or other private funding sources. Examples of those needs in Israel include essential care services to the elderly quarantined and homebound, basic assistance to families in poverty, virtual connections to persons with disabilities, educational supports for at-risk children and teens, emergency food kits and living stipends. Additional support with food, medicine, medical care and home care is also needed in Jewish communities outside of Israel, such as in the Former Soviet Union, Argentina, parts of Europe and Ethiopia.

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

1. Grants should be coordinated with other government and private funding, with priority given to programs that leverage other funding support. While the amount varies from program to program, on average the Federation leverages an additional \$4 for every \$1 it allocates.
2. Funded programs must 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 two categories, other than the Challenge Fund which has been designated by donors to support specific programs:

1. “Core” unrestricted allocations, which is Detroit’s portion of its collective responsibility with all North American Federations to support basic overseas needs addressed through its major overseas agencies: JAFI, JDC and World ORT. These agencies support Jewish communities in 70 countries worldwide. They are the first on the scene during an emergency, and often provide the infrastructure for communities to develop their own programs and services as well. They also connect Jewish communities to one another, to Israel and to the global Jewish world.
2. “Elective” programs, which are community designated projects.

National Agencies Allocations

The National Agencies Committee recommends **\$1,151,013** during the period from June 1, 2020 through February 28, 2021 to seven national agencies and two projects, organized by the Jewish Federations of North America, which benefit all communities. Several National Agencies provide important support to their local affiliates, such as professional training, networking opportunities, a platform for exchanging and best practices. These organizations also use a continental perspective to address key areas of concern to Jewish communities nationwide and can draw upon resources that individual local agencies do not have available.

The National Agency Committee recommends generally that Federation's funding support remain at last year's level prorated for the nine-month period. A reduction in support is recommended for Birthright Israel in recognition of trips being cancelled through the summer of 2020 and that the number of visits will likely be scaled back this fall. This reduction should be re-visited as Israel experiences resume.

A one-time allocation of **\$61,463** from the parameter of funding approved by the Federation and Foundation Boards in April for National Agencies is recommended to be added to those funds held back for distribution by the LAPD. It is further recommended that the annual review of national agencies be performed by the LAPD in future years in order to better assess how these organizations are supporting their local counterparts. *(See Attachment II for a summary of the National Agency allocations.)*

SUMMARY
PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS
JUNE 1, 2020 - FEBRUARY 28, 2021

	A	B	C	D	E	1
	2020 ANNUAL CAMPAIGN (Original 12 Month Allocation Cycle)	2020 ANNUAL CAMPAIGN (Updated 9 Month Allocation Cycle)	2020 CHALLENGE FUND (Original 12 Month Allocation Cycle)	2020 CHALLENGE FUND (Updated 9 Month Allocation Cycle)	2020 TOTAL (Columns B+D)	
CAMPAIGN ACHIEVEMENT						
Annual Campaign and Challenge Fund	34,000,000	26,000,000	2,800,000	2,800,000	28,800,000	
Shrinkage Allowance	(860,000)	(660,000)	(13,400)	(13,400)	(673,400)	2
Prior Year's Overachievement	400,000	400,000	-	-	400,000	
TOTAL CAMPAIGN ACHIEVEMENT	33,540,000	25,740,000	2,786,600	2,786,600	28,526,600	
CAMPAIGN ALLOCATIONS						
Israel and Overseas	8,325,130	6,389,053	433,000	433,000	6,822,053	
National Agencies	1,579,893	1,212,476	3,600	3,600	1,216,076	
TOTAL ISRAEL AND OVERSEAS & NATIONAL AGENCIES	9,905,023	7,601,529	436,600	436,600	8,038,129	
Local Agencies						
Jewish Education and Identity	5,892,794	4,522,378	790,110	790,110	5,312,488	
Community Services	4,642,815	3,563,091	644,890	644,890	4,207,981	
Additional Local Support	13,099,368	10,053,002	915,000	915,000	10,968,002	3
TOTAL LOCAL SUPPORT	23,634,977	18,138,471	2,350,000	2,350,000	20,488,471	
TOTAL CAMPAIGN ALLOCATIONS	33,540,000	25,740,000	2,786,600	2,786,600	28,526,600	

In an effort to provide a consistent level of support to our agencies during the COVID-19 pandemic, the joint Federation and Foundation Boards voted to close the 2020 Annual Campaign as of March 31, 2020, and to allocate for the nine months starting June 1, 2020, the \$26 million raised to date through the Campaign and the \$2.8 million raised to date through the Challenge Fund. In addition, the 2021 Campaign - and all future Campaigns - will begin in September and end in May with allocations distributed from March 1 through February 28. This new Campaign calendar will allow Federation to position the majority of the Campaign ahead of the allocations process and establish more certainty between raised and allocated funds, while also shortening the Campaign year.

ATTACHMENT I - ISRAEL AND OVERSEAS
PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS
JUNE 1, 2020 - FEBRUARY 28, 2021

	A	B	C	D	E	
	2020 ANNUAL CAMPAIGN (Original 12 Month Allocation Cycle)	2020 ANNUAL CAMPAIGN (Updated 9 Month Allocation Cycle)	2020 CHALLENGE FUND (Original 12 Month Allocation Cycle)	2020 CHALLENGE FUND (Updated 9 Month Allocation Cycle)	2020 TOTAL (Columns B+D)	1
CORE ALLOCATIONS						
World ORT	139,900	107,360	-	-	107,360	
JDC	2,442,724	1,874,546	-	-	1,874,546	4
JAFI	4,412,506	3,386,157	-	-	3,386,157	4
TOTAL CORE ALLOCATIONS	6,995,130	5,368,063	-	-	5,368,063	
ELECTIVE ALLOCATIONS						
Partnership 2Gether - Central Galilee	757,000	580,922	-	-	580,922	
LYA Partnership - Central Galilee	18,000	13,813	-	-	13,813	
Assistance to the Elderly and Children in Kiev	200,000	153,480	-	-	153,480	
Ethiopian National Project	90,000	69,066	-	-	69,066	
Nevatim	46,500	-	-	-	-	5
Shin Shin Program	45,000	34,533	-	-	34,533	
National Coalition Supporting Eurasian Jewry	8,000	6,139	-	-	6,139	
Community Shaliach	80,500	61,776	-	-	61,776	
Emergency Needs - JAFI/JDC	85,000	101,261	-	-	101,261	6
TOTAL ELECTIVE ALLOCATIONS	1,330,000	1,020,990	-	-	1,020,990	
TOTAL CHALLENGE FUND DESIGNATIONS	-	-	433,000	433,000	433,000	
TOTAL ISRAEL AND OVERSEAS	8,325,130	6,389,053	433,000	433,000	6,822,053	

ATTACHMENT II - NATIONAL AGENCIES
PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS
JUNE 1, 2020 - FEBRUARY 28, 2021

	A	B	C	D	E	
	2020 ANNUAL CAMPAIGN (Original 12 Month Allocation Cycle)	2020 ANNUAL CAMPAIGN (Updated 9 Month Allocation Cycle)	2020 CHALLENGE FUND (Original 12 Month Allocation Cycle)	2020 CHALLENGE FUND (Updated 9 Month Allocation Cycle)	2020 TOTAL (Columns B+D)	1
NATIONAL AGENCIES						
Network of Jewish Human Service Agencies	5,000	10,000	-	-	10,000	
Hillel International	43,566	33,500	-	-	33,500	
JCC Association of North America	43,021	33,100	-	-	33,100	
Jewish Council of Public Affairs	23,292	18,000	-	-	18,000	
70 Faces Media	15,000	11,500	-	-	11,500	
Israel Action Network	34,792	26,700	-	-	26,700	
JFNA Education Unit	20,000	10,000	-	-	10,000	
JFNA Dues	1,183,432	908,213	-	-	908,213	
Birthright Israel	211,790	100,000	3,600	3,600	103,600	
Unallocated Funds for Future COVID-19 Needs	-	61,463	-	-	61,463	7
TOTAL NATIONAL AGENCIES	1,579,893	1,212,476	3,600	3,600	\$1,216,076	

ATTACHMENT III - LOCAL AGENCIES
PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS
JUNE 1, 2020 - FEBRUARY 28, 2021

	A	B	C	D	E	
	2020 ANNUAL CAMPAIGN (Original 12 Month Allocation Cycle)	2020 ANNUAL CAMPAIGN (Updated 9 Month Allocation Cycle)	2020 CHALLENGE FUND (Original 12 Month Allocation Cycle)	2020 CHALLENGE FUND (Updated 9 Month Allocation Cycle)	2020 TOTAL (Columns B+D)	1
JEWISH EDUCATION AND IDENTITY						
Schools						8
Farber Hebrew Day School	344,263	264,203	64,653	64,653	328,856	
Hillel Day School	569,542	437,090	88,922	88,922	526,012	
Yeshiva Beth Yehudah	808,002	620,094	132,656	132,656	752,750	
Yeshiva Gedolah	90,880	69,745	17,200	17,200	86,945	
Yeshivas Darchei Torah	289,482	222,161	40,976	40,976	263,137	
Congregational School Funding	373,316	286,498	67,366	67,366	353,864	
BBYO	61,152	46,931	10,037	10,037	56,968	
Fresh Air Society / Tamarack Camps	432,864	332,198	73,021	73,021	405,219	
Hillel Foundations						
Hillel of Metro Detroit	143,209	109,905	24,116	24,116	134,021	
MSU Hillel / Michigan Jewish Conference	194,282	149,100	24,670	24,670	173,770	
HCAM	62,629	48,064	-	-	48,064	
Michigan Hillel at the University of Michigan	139,810	107,296	24,314	24,314	131,610	
Jewish Community Center	1,304,314	1,000,985	222,179	222,179	1,223,164	
JCC Education Department	969,049	743,689	-	-	743,689	9
Mission Subsidies	110,000	84,419	-	-	84,419	
TOTAL JEWISH EDUCATION AND IDENTITY	5,892,794	4,522,378	790,110	790,110	5,312,488	
COMMUNITY SERVICES						
Hebrew Free Loan	129,244	99,187	22,775	22,775	121,962	
JCRC/AJC	278,246	213,538	48,041	48,041	261,579	
Jewish Family Service	2,348,453	1,802,301	348,959	348,959	2,151,260	
Jewish Senior Life	450,106	345,430	69,422	69,422	414,852	
JVS Human Services	1,180,577	906,024	155,694	155,694	1,061,718	
Foundation for our Jewish Elderly	256,189	196,610	-	-	196,610	10
TOTAL COMMUNITY SERVICES	4,642,815	3,563,091	644,890	644,890	4,207,981	

ATTACHMENT IV - LOCAL AGENCIES
PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS
JUNE 1, 2020 - FEBRUARY 28, 2021

	A	B	C	D	E	
	2020 ANNUAL CAMPAIGN (Original 12 Month Allocation Cycle)	2020 ANNUAL CAMPAIGN (Updated 9 Month Allocation Cycle)	2020 CHALLENGE FUND (Original 12 Month Allocation Cycle)	2020 CHALLENGE FUND (Updated 9 Month Allocation Cycle)	2020 TOTAL (Columns B+D)	1
ADDITIONAL LOCAL SUPPORT						
Community Security Program	567,468	435,499	-	-	435,499	
Agency Support to Cover Rent for UJF Facilities	4,000,000	3,069,767	-	-	3,069,767	11
Real Estate Centralization Costs	250,000	191,860	-	-	191,860	
Campaign Reserve	250,000	191,860	-	-	191,860	
Campaign Expenses	112,568	86,389	-	-	86,389	12
Capital Needs Fund Grant	1,200,000	920,930	-	-	920,930	
Endowment Fund Matching Grants	1,500,000	1,151,163	-	-	1,151,163	13
Unallocated Funds for Future COVID-19 Needs	965,792	741,189	-	-	741,189	14
Youth Mental Health	76,000	56,000	-	-	56,000	
Impact Measurement Program	10,000	10,000	-	-	10,000	
Federation Operating Budget Support						15
Community Development/Engagement	1,014,672	778,702	-	-	778,702	
Strategic Planning and Partnerships	173,031	132,791	-	-	132,791	
Israel and Overseas Services	509,840	391,273	-	-	391,273	16
Other Direct Program Services	419,997	322,323	-	-	322,323	
Support Services	2,050,000	1,573,256	-	-	1,573,256	17
Challenge Fund Designations	-	-	915,000	915,000	915,000	18
TOTAL ADDITIONAL LOCAL SUPPORT	13,099,368	10,053,002	915,000	915,000	10,968,002	
TOTAL LOCAL AGENCIES	23,634,977	18,138,471	2,350,000	2,350,000	20,488,471	

ATTACHMENT V - LOCAL AGENCIES
PROPOSED CAMPAIGN BASE ALLOCATIONS
2019 - 12 MONTH CYCLE / 2020 - 12 MONTH CYCLE / 2020 - UPDATED 9 MONTH CYCLE

	A	B	C	
	2019 ANNUAL CAMPAIGN (12 Month Allocation Cycle)	2020 ANNUAL CAMPAIGN (12 Month Allocation Cycle with Addition to Base Allocations)	2020 ANNUAL CAMPAIGN (Updated 9 Month Allocation Cycle)	
JEWISH EDUCATION AND IDENTITY				19
Schools				
Farber Hebrew Day School	321,165	344,263	264,203	
Hillel Day School	538,951	569,542	437,090	
Yeshiva Beth Yehudah	764,084	808,002	620,095	
Yeshiva Gedolah	86,891	90,880	69,745	
Yeshivas Darchei Torah	271,078	289,482	222,161	
Congregational School Funding	373,316	373,316	286,498	
BBYO	58,652	61,152	46,931	
Fresh Air Society / Tamarack Camps	409,864	432,864	332,198	
Hillel Foundations				
Hillel of Metro Detroit	140,709	143,209	109,905	
MSU Hillel / Michigan Jewish Conference	191,782	194,282	149,100	
HCAM	60,129	62,629	48,064	
Michigan Hillel at the University of Michigan	137,310	139,810	107,296	
Jewish Community Center	1,289,314	1,304,314	1,000,985	
JCC Education Department	964,049	969,049	743,689	
Mission Subsidies	110,000	110,000	84,419	
TOTAL JEWISH EDUCATION AND IDENTITY	5,717,294	5,892,794	4,522,378	
COMMUNITY SERVICES				19
Hebrew Free Loan	127,744	129,244	99,187	
JCRC/AJC	277,246	278,246	213,538	
Jewish Family Service	2,323,453	2,348,453	1,802,301	
Jewish Senior Life	390,106	450,106	345,430	
JVS Human Services	1,150,577	1,180,577	906,024	
Foundation for our Jewish Elderly	249,189	256,189	196,610	
TOTAL COMMUNITY SERVICES	4,518,315	4,642,815	3,563,091	

Notes

- 1.)** Challenge Fund allocations include: A.) General Grants given to agencies historically as part of their Campaign allocations, B.) Donor Designations given in accordance with the explicit instructions of donors, and C.) Special Grants given in some years to address high priority needs that cannot be handled by the normal Campaign allocation. There are no special grants for this cycle. Challenge Fund allocations are the same for both the 9-month and 12-month cycle because funding for the year has already been committed.
- 2.)** Shrinkage allowance of 2.5%, determined by Federation's Finance Committee, based on pledges for the Annual Campaign and Challenge Fund.
- 3.)** Includes local support for agencies' and Federation's operating budget (support services and direct program costs).
- 4.)** Year 2 of a 3 year phase-in of an additional \$1 million in core unrestricted support to JDC. \$200,000 in year 1 and \$400,000 in each of the next two years, with \$400,000 each year from JAFI.
- 5.)** Deferred for a year due to the COVID-19 pandemic.
- 6.)** To be allocated on a one-time basis to JAFI/JDC to help address emergency needs.
- 7.)** Funding held back by the National Agencies Committee for later distribution given the uncertainty created by the COVID-19 pandemic.
- 8.)** Due to a generous contribution, Frankel Jewish Academy has been able to meet their financial strategic plan, allowing funds to be redirected toward vital community needs.
- 9.)** Allocation to the Jewish Community Center for support of the Education Department, which was previously part of Federation.
- 10.)** Distribution to the Foundation for our Jewish Elderly to support in-home support services, escorted transportation and adult day care.
- 11.)** Agencies occupying space owned by the United Jewish Foundation (UJF) are required to pay fair market value for rent. Federation is providing an allocation to the agencies to pay this rent. UJF will then give Federation an allocation for the amount of rent collected. There are no cash exchange implications. This process creates greater financial transparency.
- 12.)** Costs related to credit card fees.
- 13.)** Endowment fund matching grants supporting local agencies, synagogues and programs.
- 14.)** Funding held back by the Local Agency Planning Division for later distribution given the uncertainty created by the COVID-19 pandemic.
- 15.)** Subject to review of the Federation Operating Budget by the Federation Finance Committee.

16.) Amount contributed from the Federation Operating Budget to operate Israel offices in Detroit and Jerusalem.

17.) Costs related to Federation/Foundation Operating Budget, net of management fees and direct income. These expenses support annual initiatives that helped raise \$59.7 million (3/31/2020) in additional funds for local programs beyond the Annual Campaign, including A.) \$48.2 million for Support Foundations and Philanthropic Funds, B.) \$3.7 million for Restricted Funds and Planned Giving Vehicles, C.) \$700,000 for PACE Funds, and D.) \$7.1 million for the COVID-19 Emergency Campaign.

18.) Gifts that are donor restricted to specific agencies and programs.

19.) This chart compares each agency's 2019 Annual Campaign allocation with a full year allocation and a nine month allocation. In comparison to 2019, each agency will receive an increase to their base allocation on a month-to-month basis for the nine month period starting June 1, 2020.

Attachment VI

Total Federation/Foundation Projected Support For Local, Israel and Overseas and National Agencies (Sources)

Total Support = \$40.6M

