



# Budget & Allocations Report

## FY 2017-2018

(June 1, 2017 - May 31, 2018)



# Our **Mission**

The Jewish Federation of Metropolitan Detroit is the cornerstone of our Jewish community. We are committed to taking care of the needs of the Jewish people and building a strong and vibrant Jewish future in Detroit, in Israel and around the world.

We will:

- Strengthen **JEWISH IDENTITY**
- Build **JEWISH COMMUNITY**
- Grow **JEWISH PHILANTHROPY**





Here For Good is a reminder that we are here for today, for those needing help as well as for those searching for connection.

We're here for tomorrow, too, and we strive to ensure a bright and vibrant future for our children and all future generations.

With your support, Federation is **Here For Good.**

# Planning and Allocations Steering Committee

---

We gratefully acknowledge the work and commitment of the members of the  
FY 2016-17 Planning and Allocations Steering Committee (PASC).

Stewart Weiner, Chair  
Ron Applebaum  
Michael Berke  
Stacy Brodsky  
Sandra Muskovitz Danto  
Nancy Glen  
Paula Goldman-Spinner  
Jodi Goodman  
Rob Gordon  
Ken Goss  
Nancy Grosfeld  
Dan Guyer  
Bob Heinrich  
Brian Hermelin  
Bernie Kent  
Sherri Ketai  
Mark Kowalsky  
Beverly Liss  
Larry Nemer  
Marcie Orley  
Ronald Rich  
Benjamin Rosenthal  
Deborah Rosenthal  
Jennifer Silverman  
Paul Silverman  
Laurence Tisdale  
Lawrence Wolfe

## **Staff**

Linda Blumberg  
Scott Kaufman  
Todd Krieger  
Steven Ingber  
Jeff Lasday  
Harvey Leven  
Howard Neistein

## TABLE OF CONTENTS

---

PASC Report and Allocation Recommendations .....	2 - 16
<b>Allocations Tables</b>	
Allocations Summary .....	18
Israel and Overseas – Attachment I .....	19
National Agencies – Attachment II .....	20
Local Agencies – Attachment III .....	21 - 22
Notes .....	23
Local Allocations: Challenge Fund Breakdown – Table I .....	24
Local Allocations: Challenge Fund Breakdown – Table II .....	25
Total Federation/Foundation Support to Local Agencies: Projected for FY 2017-18 Attachment IV .....	26

# Planning and Allocations Steering Committee (PASC)

## 2017-18 Allocations

### Stewart Weiner, Chairperson

#### Our Vision

---

The Jewish Federation of Metropolitan Detroit is the cornerstone of our Jewish community. We are committed to taking care of the needs of the Jewish people and building a strong and vibrant Jewish future in Detroit, in Israel and around the world. We will:

- Strengthen **JEWISH IDENTITY**
- Build **JEWISH COMMUNITY**
- Grow **JEWISH PHILANTHROPY**

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 70 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 to enter Federation and many ways to contribute and participate in our vital work. Each person can choose to enter his/her own door, be that through hands-on volunteerism with one of our constituent agencies, a contribution to Federation, helping to raise money on behalf of the community, or one of many other avenues. 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 2017

---

Federation's 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 \$31.80 million for the Annual Campaign and \$3.16 million for the Rose Family Challenge Fund, a remarkable achievement. These funds will help us address our community priorities:

- Ensuring that there is a safety net of services for those in need in our community, in Israel and in Jewish communities around the world.
- Providing a Jewish education for our children and a myriad of Jewish experiences to strengthen their Jewish identity.
- Attracting and retaining our young adults and connecting them to the Jewish community.
- Helping our older adults maintain their independence and live their lives with dignity.
- Supporting our community's infrastructure.
- Ensuring and maintaining 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, our donor base in 2016 was 11,800 donors with a higher retention rate than in the past. The goal is to increase the donor base to 12,000 this year. The focus will be not only on increasing the donor base but on retention as well.
2. **Providing Assistance to Jews in Need:** 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 600 individuals and families in crisis in our community with emergency financial assistance and case management.
  - b. Assisted Jewish Family Service to enable their Project Chessed staff, who had transitioned from their previous roles, to serve as health care navigators in Macomb and Oakland counties helping people with enrollment through the government Health Care Marketplace and Michigan's Medicaid system. A Russian speaking navigator was also available. More than 2,400 people attended 108 "navigation events" and 2,600 people were assisted outside of events.
  - c. Helped Jewish Family Service provide 570 Holocaust survivors with case management, indemnification services, and home care assistance.
  - d. Helped Jewish Senior Life and Jewish Family Service provide in-home support services to 800+ older adults, enabling them to remain living at home.
  - e. Provided scholarship support for the day schools to help make a Jewish education possible for 1,618 students (64% of day school students) in need of financial assistance.
  - f. Provided the congregational schools with more than \$400,000 in scholarship support.

- g. Helped the Jewish Community Center and Tamarack Camps provide approximately \$1.5 million in Jewish camp scholarships.
  - h. Helped provide Jewish Family Service with staff to respond to intake calls from 4,500 separate individual community members in distress or just needing information.
  - i. Helped JVS provide employment services to more than 4,500 members of the Jewish community.
  - j. Helped Hebrew Free Loan to provide loans for living expenses, transportation, vocational training, educational expenses and additional vital needs. The agency currently has a total loan portfolio valued at more than \$10.72 million and approximately 6,000 individual loan accounts.
  - k. Helped the campus Hillels (Michigan State University Hillel, Michigan Hillel at the University of Michigan, Hillel of Metropolitan Detroit and the Hillel Campus Alliance of Michigan – HCAM) to serve 6,700+ Jewish students.
3. **NEXTGen Detroit:** To attract, retain and engage young Jewish adults in Metropolitan Detroit and connect them to Federation, we continue to invest in NEXTGen Detroit. Since its inception five years ago, NEXTGen Detroit has grown Federation’s young adult engagement from 1,500 to 5,000 participants and from 1,000 to 3,500 donors, while emerging as a national model studied and replicated across North America. Dozens of communities have visited Detroit to learn from our success. Significant accomplishments this past year include record numbers of people at two major social/fundraising events, Latke Vodka and EPIC. More than 550 people attended EPIC, which raised more than \$280,000 for the Annual Campaign and had a 42% gift-for-gift increase. More than 1,150 young adults attended Latke Vodka, making it the largest outreach event of the year. In addition, NEXTGen continues to engage young adults in our community who would otherwise be unaffiliated through programs like NEXTGen Detroit Pride, reaching out to the LGBTQ community and through NEXTGen Detroit Interfaith Couples.
4. **Centennial Fund:** Five 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 \$195 million has been pledged to the Centennial Fund. Although many gifts are testamentary, almost 60% are lifetime gifts and are currently providing funding for important community services. These funds are needed to secure the future of our local Jewish community and 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 and other vulnerable populations, including children and at-risk families.
  - b. **Jewish Identity and Education** - support for a progression of Jewish life 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 at-risk Jews and building strong 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 successfully increased revenue for various agencies during FY 2016-17 by securing \$2,459,650 in grants, with an additional \$2.9 million in requests still pending. Since the grant writers began five years ago, their achievement is more than \$14.9 million on behalf of our agencies.
6. ***I Volunteer Jewish Detroit:*** The Federation's user-friendly Jewish community volunteer website, *I Volunteer Jewish Detroit*, is a collaboration of Federation's constituent agencies, Jewish organizations and congregations that utilize volunteers. *I Volunteer Jewish Detroit* matches individuals, families and groups with opportunities for hands-on meaningful involvement with a variety of Jewish non-profit organizations.
- In the past 3 years, the site has expanded from 13 to 29 agencies and organizations.
  - 75% of those logging onto the site are first timers to a Federation website.
  - 71% of registrants return to the site.
  - There are currently 900 volunteer opportunities on the website.
  - Peak months for searching for volunteer opportunities are December, January, April and September.

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

## Ensuring a Safety Net for Our Community

---

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 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](http://jewishdetroit.org/help).

## Multicultural Integration Funding Grant

---

The 2017 State Multicultural Integration Funding Grant to Federation was increased to \$3 million from the Department of Health and 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 foundations. This remarkable achievement was due to the efforts of the Government Relations Oversight Committee (GROC), chaired by Ron Klein and Josh Opperer, and to the extraordinary assistance of Dennis Bernard and Evan Weiner, previous GROC Co-Chairs, and Sandi Lewis and Jon Smalley, Federation's lobbyists with Muchmore, Harrington, Smalley and Associates in Lansing. GROC continues its joint State government advocacy efforts with our Arab partners, ACCESS and ACC, to maintain the grant and hopefully increase it for FY 2018.

## Allocations Impact Model (AIM)

---

As the central philanthropic organization in the Jewish community, it is important that the Federation and its agencies demonstrate to their donors that the funds raised and allocated are having a significant positive impact in the community and that donor investments in our community are making a measurable difference.

This year, the Federation continued its implementation of the Allocations Impact Model, which provides our agencies with measurement tools and a consultant to work with them so they can better demonstrate their impact. The agencies and Federation, as well as the Jewish community at large, will greatly benefit from this process. Federation is the agencies' partner throughout. The impact-based allocation process:

1. Partners the agencies with the Planning Divisions and together they help the agencies to build capacity and demonstrate their impact.
2. Helps the agencies develop better data about their programs, deliver greater benefits to those whom they serve, become more efficient, be better able to respond to grant opportunities, and raise more money because they can demonstrate their programs' value and impact to the community.
3. Helps Federation and its constituent agencies to more effectively tell their stories to donors by highlighting not only what agencies are doing, but also by quantifying their impact. Donors will be able to more easily learn what difference their contributions are making in the community.
4. Rewards agencies with additional funding, when available, if they run quantifiable and impactful programs.
5. Strengthens our agency accountability system.

Federation engaged Professor Sue Ann Savas from the Curtis Center Program Evaluation Group at the University of Michigan to work with the agencies on this project, which started with training sessions for agency staff, Federation Planning Division leadership and PASC members. Then Professor Savas and her team met individually with each agency and worked with them to identify their metrics for FY 2016-17, which was a pilot year. Due to the individual agencies' varying infrastructure, staffing and experience with developing metrics, the process took longer than expected for a number of agencies, with some agencies needing extensive assistance from Professor Savas. Every agency developed metrics with her help for FY 2016-17 and full year reports will be submitted this summer. The agencies are in the process of establishing their metrics for FY 2017-18.

## Transition of Federation's Jewish Education Programs to the JCC

---

Beginning June 1, 2017, Federation's Education Department will transition to the Jewish Community Center of Metropolitan Detroit. Transitioning Federation's Education Department to the JCC will consolidate the Jewish education and identity-building services that are being provided by both Federation and the JCC and set the stage for a stronger, more cohesive community platform for all Jewish education, identity and culture programs. Central to the concept of a "Reimagined JCC" is the notion that Jewish education will now form the cornerstone of the JCC's core mission and identity. The move will also foster greater collaborations between the JCC, Federation, congregations, Jewish day schools, youth groups, and other Jewish education and identity-building organizations, ultimately involving more community-members in a richer array of Jewish education and cultural experiences.

The Federation programs which will transfer to the JCC are: **JFamily** (PJ Library, Family Jewish Educators, Jbabydetroit!, community programs and SPARC), **Adult Jewish Learning** (FedEd and Florence Melton School of Adult Jewish Learning), **Opening the Doors** (Special Needs Jewish Education), **School Services** (Jewish educator networks and professional development), and **Jewish Teen Engagement**.

The intent of the plan is to promote a new innovative Center for Jewish Education and Culture. The transition will consolidate and strengthen the resources that currently exist through Federation's Jewish Education Department and—using the JCC's platform—make them available to a larger audience throughout the metro Detroit area.

The students and other constituents of the education programs that move to the JCC will see no difference in their classes and programs, though eventually there will be a wider array of program offerings. In addition, a key principle of this new integrative design is the concept of establishing a "JCC without walls" operating throughout the metro Detroit region. While some programs will take place on the Applebaum Campus in West Bloomfield, many will be offered in a variety of other venues and locations, including Oak Park, the Woodward corridor, downtown and other locations that are convenient for users.

In order to ensure a smooth transition and future success, the transition will include the following:

1. The full Jewish education budget, including annual allocation, endowments, grants and tuition, will be transitioned to the JCC as a designated allocation for Jewish education, separate from the annual JCC allocation, specifically earmarked to be used for the Jewish education department programs.
2. A joint Federation–JCC committee will determine additional appropriate support that may be needed so that the department is transitioned with full overhead costs to the JCC.
3. To help ease the transition, for 2017-18 Federation employees in the Jewish Education Department will be leased to the JCC. Status of Federation employees will be reviewed prior to 2018-19 allocation. If in the future Federation Jewish Education Department employees become JCC employees, their compensation and benefits should not suffer due to the transition.
4. Federation makes a continued commitment to support Jewish education at the level it has been supported.
5. Federation’s Jewish Education and Identity Division (JEdI) will be charged with monitoring the transition and working with the JCC to safeguard funds, develop metrics for success, and collaboratively develop a vision for community Jewish education.
6. Federation committees, which oversee Jewish education allocations and planning, will remain Federation committees. Other committees, which directly oversee the implementation of Jewish education services (e.g., Opening the Doors Committee and JFamily Committee), will transition to the JCC. These committees will continue to work in close collaboration with the Federation in evaluating direct services, planning for communal needs and developing future innovative programs. With the JCC’s new emphasis on Jewish education, the JCC will review its governance structure to ensure that its Board includes members who are “champions of Jewish education.”
7. Jewish education staff will continue to consult and work with Federation’s Jewish Education and Identity Division (JEdI).
8. Jewish education staff will continue to work with Federation’s Engagement Department in order to provide the community with a collaborative menu of Jewish identity programs.

## Real Estate Centralization

---

Historically, the local Jewish community has migrated westward from Detroit, but that migration ended a number of years ago and the community is remaining in its buildings and facilities longer than it ever has before. Given this, and the fact that some of our real estate, which had been managed by our agencies in past years, is in need of repair, Federation has centralized property management and has taken on full responsibility for managing the entire realty portfolio. This new model allows our agency executives to focus on their core missions, thereby reducing their management burden. It also is resulting in economies of scale, buildings being brought up to acceptable standards and some cost savings, and will ensure our infrastructure is clean, safe and viable for many years to come.

In FY 2015-16, the Federation began transitioning the agencies to this new model and continued in FY 2016-17, integrating the agencies that have buildings owned by Federation. Over the course of the year, each agency's real estate costs were analyzed to ensure that they are budgeting appropriately; vendors were replaced where there were deficiencies; and corrections were made immediately in situations involving cleanliness, health and/or safety issues. Each agency is required to appropriately fund its real estate budget, which Federation's real estate team helped to develop and manage in collaboration with Newmark, Frank, Grubb and Ellis (Newmark), its partner on this project. A \$1,200,000 gift from the United Jewish Foundation covered Newmark's fees during the first two years of the program and will be used to help offset the cost in the third year. In FY 2016-17, an allocation from the additional 2016 Campaign achievement also covered the agencies' increased real estate operating costs, plus those participating in the community security program also received an offset to their portion of that cost.

While the cost of their Newmark management fees will be covered for FY 2017-18, the agencies' individual maintenance costs will be the responsibility of the agencies themselves. Federation and its planning and real estate teams are working collaboratively with our agencies to make their transition to our new real estate model as beneficial and easy as possible. The Real Estate team is working with agency leaders to ensure the right long term real estate strategy and master plan.

## [Jewishdetroit.org](http://Jewishdetroit.org)

---

Federation is moving towards development of a new comprehensive communications/service concept for the Jewish community. Whether one thinks of Amazon, United Way's 211, or any other powerful aggregator, it benefits the consumer by removing multiple steps between them and the services/products they need. Federation is working to remove the burden of sorting through multiple overlapping organizations, with differing intake mechanisms, all underfunded for marketing and online optimization. To help do this, Federation will maximize and transform its powerful marketing tool *Jewishdetroit.org*, which is a community-wide platform that aggregates and delivers a wide range of programs and services throughout metro Detroit. The plan is for *Jewishdetroit.org* to provide seamless access and an optimized customer experience for those looking for assistance and services, and/or who want to learn, connect and engage with the Jewish community. Over the next year, Federation will be developing this concept which will have several components, *Jlife*, *Jhelp*, *Jlead* and others over time.

## Planning and Allocations

### 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 Israel and Overseas Committee, Real Estate Committee, Capital Needs Committee and the National Agencies Council.

*A special thank you 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.*

### Planning Divisions

---

All constituent agencies are assigned to one of two Planning Divisions. The Community Services Division includes the social welfare and advocacy agencies: Hebrew Free Loan, Jewish Community Relations Council/American Jewish Committee (JCRC/AJC), Jewish Family Service, Jewish Senior Life and JVS. The Jewish Education and Identity (JEdI) Division integrates formal and informal Jewish education services for planning and allocations. This Division includes the day schools, congregational schools, BBYO, Tamarack Camps, the Jewish Community Center and the campus Hillels.

The Planning Divisions serve as the primary liaison between the Federation and constituent agencies. They provide program and fiscal oversight and help to ensure that Federation dollars are spent wisely and in accordance with Federation's and the agencies' missions and the purpose for which the dollars were allocated. The Divisions work closely with Federation's Director of Business Practices who assists with this process and helps ensure that the agencies have sound fiscal management.

In addition, the Planning Divisions address agency and communal issues that arise. The Planning Divisions also make recommendations for annual allocations to each local agency. They do this based on meetings over the course of the year with each of the agencies and a review of each agency's budget and financial statements.

When making local agency allocation recommendations, the Planning Divisions take into account the needs of the agencies in their Divisions in the context of community core impact areas and priorities. The Divisions view allocation decisions from a global/communal perspective, not just from an individual agency perspective. They also ensure that allocation decisions, particularly if decreases are made, do not undermine the integrity of an agency's operations, mission and programs.

## Allocations Process

---

The FY 2017-18 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.

## Allocations

The Board of Governors approved Campaign and Challenge Fund allocation parameters in April. These were based on a projected 2017 Campaign achievement of \$31,800,000, which is \$1,000,000 more than the 2016 Campaign achievement. The 2017 Challenge Fund achievement has primarily been comprised of designations, a large majority of which are for capital needs, thereby reducing the amount of unrestricted dollars. This created a shortfall of \$875,000 in agency base Challenge Fund allocations. The decision was made to transfer \$875,000 of additional Campaign achievement to the Challenge Fund, which enabled base Campaign and Challenge Fund allocations in the aggregate to be maintained at FY 2016-17 levels for the agencies. However, the agencies will not receive a renewal of the special one time Challenge Fund grants that they received in FY 2016-17. The agencies will also have to plan for increased real estate expenses and security costs.

Over two years, the 2016-17 fiscal year and continuing into FY 2017-18, the Federation and Foundation will invest approximately \$10 million to repair our agencies' infrastructure, addressing health, safety and building critical issues. In addition, we will continue to invest approximately \$500,000 annually in security to ensure the safety of our children and those using community facilities.

While base allocations in FY 2017-18 remain flat in the aggregate for local agencies, the agencies will continue to receive additional assistance for their infrastructure, maintenance and security costs. The increase for real estate and capital needs in the allocation parameters will benefit the agencies. This is an area that had long been neglected and needs to be addressed. This is very important as the agencies must have facilities that are safe and well-kept in order for their staffs to be able to function and provide vital services and programs for the community.

In addition to their Campaign allocations, the agencies' 2017-18 Newmark management fees (part of the Real Estate Centralization costs) will be covered by Federation, as approved by the Federation Executive Committee, from the remainder of the three year grant from the General Fund for real estate centralization and from the Campaign Reserve. The agencies will also continue to receive professional consultation in order to develop impact metrics to enable them to better tell their story and seek foundation, public and private funding.

Based on community priorities, the PASC determined overall Planning Division allocation parameters for FY 2017-18. 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 2017-18 of **\$35,219,140** are based upon the following assumptions:

- A 2017 Campaign achievement of **\$31,800,000** from the Annual Campaign plus **\$3,166,640** from the Rose Family Challenge Fund for a total of **\$34,966,640**.
- A shrinkage factor of **(\$847,500)**. The percentage is 2.5% based on increased collections and the Finance Committee's recommendation.
- Prior year's overachievement of **\$1,100,000**.

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. **General Grants:** These are Challenge Fund dollars that have been historically added to the funds given to the agencies as part of their Campaign Allocation.
2. **Donor Designations:** These grants are given in accordance with the explicit instructions of donors to the Challenge Fund.
3. **Challenge Fund Special Grants:** These grants are given to address high priority needs that cannot be handled by the normal Campaign allocation. *In FY 2017-18, due to the decrease in unrestricted Challenge Fund dollars as a result of the increase in designated dollars for community infrastructure needs, there will be no Challenge Fund Special Grants.*

## **Support for Agencies Beyond the Annual Campaign and Challenge Fund**

---

The Annual Campaign and Challenge Fund are not the only support from Federation that our constituent agencies receive. Local agencies also receive significant 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 and other grants, agency endowment distributions, programming endowments, Millennium and other Federation funds, Centennial Funds, and distributions from the Foundation for Our Jewish Elderly. **(Please see Attachment IV following the Allocation Tables.)**



## Local Allocations

---

The PASC recommends an overall local allocation of **\$24,607,137** to support services and programs provided through 17 local agencies and Federation. This amount is comprised of **\$20,944,297** from the Annual Campaign and **\$3,662,840** from the Challenge Fund, which includes donor designations of **\$2,027,840** and general base allocations of **\$1,635,000**.

Local allocations include:

1. **\$6,887,904** for Jewish Education and Identity. The process this year for allocations to day schools has been modified. The schools were given notice in their FY 2016-17 allocation letters "that the Jewish Identity and Education Division would continue to explore and consider a different allocation model for the day and congregational schools for FY 2017-18. The current formula does not sufficiently take into account demographic and enrollment trends over the last few years and these need to be addressed further."

Annual allocations to the day schools have generally been based on historical allocations. To create more equity in allocations, the Jewish Education & Identity Division recommended that over the next four years, Federation begin phasing in a new formula for day school allocations in which by year four, 50% will be based on the percentage of a school's enrollment of the total day school enrollment and 50% based on historical allocations/schools' needs. The phase-in will begin in FY 2017-18, with the allocation based 20% on the percentage of a school's enrollment of the total FY 2016-17 day school enrollment and 80% based on historical allocations. This new process will be evaluated annually and may be modified depending on the findings.

Any negative impact of this change on specific schools is primarily mitigated due to the Federation's having secured over the past year additional support, beyond the Annual Campaign, for day schools.

Also, in the allocations for Jewish Education and Identity, there is a new line item with an additional allocation to the Jewish Community Center for the transition of the Federation Education Department to the JCC. This is offset by an allocation reduction for Additional Local Support.

2. **\$5,254,880** for Community Services.
3. **\$12,464,353** for Additional Local Support to fund Federation's operating budget and additional support services for the agencies:
  - **\$2,435,000** (**\$1,200,000** from the Annual Campaign and **\$1,235,000** from designated Challenge Fund gifts) for the Capital Needs Reserve which provides grants to local agencies for equipment replacements and facility repairs.
  - **\$296,866** for community security needs.

- **\$4,000,000** 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 Federation an allocation for the amount of the rent collected. There are no cash exchange implications. This process creates greater financial transparency.
- **\$5,732,487** for services and endowment fund matching grants that provide support to local agencies and programs. These funds also contribute towards Campaign expenses, some designations, and the Federation operating budget, a portion of which supported fundraising efforts for FYE 5/31/17 of approximately \$60.1 million (as of 3/17) beyond the Annual Campaign to assist local agencies and programs.

## National Allocations

---

**\$1,641,773** is recommended to support Birthright Israel, 9 national agencies and JFNA's Education Unit, national central services and Jewish Federations of North America's dues.

## Israel and Overseas Allocations

---

**The Israel and Overseas Committee (IOC)** recommends **\$8,970,230** to support programs and services provided through the Federation's overseas agencies. From this amount, **\$8,167,130** is from the 2017 Annual Campaign and **\$353,800** is donor designated contributions given through the Rose Family Challenge Fund for specific programs. Also included is **\$449,300**, contributed from the Federation's Operating budget to support its Mission programs and exchanges, and its activities administered through its department offices in Detroit and in Jerusalem.

JFMD has historically 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.

JFMD's overseas allocations help address needs, which often mirror those that exist in the local Detroit Jewish community. They target those who are the most vulnerable, primarily youth and families at-risk, the elderly, the disabled, and other disenfranchised populations.

An increased focus this year was given to understanding the needs in overseas Jewish communities outside Israel, given the spike in reported anti-Semitic incidents in Europe, and the continuing economic crises that exist in countries like Venezuela and Ukraine. The financial crisis in Venezuela has deteriorated over recent months to the point that the country is now in a state of emergency. Included in this year's overseas allocation recommendations is a grant to help address the scarcity of medicine and basic food items for more than 600 families, approximately 10% of the Jewish population, who have been identified as being the most vulnerable.

Two years following the conflict in Ukraine, a shaky cease-fire is in place. However, poor economic conditions and rampant inflation continue to exist. Federation's funding in Kiev provides home care, food support, medical care and winter relief to 17,800 elderly clients and more than 2,200 families with young children in Kiev. This is in addition to the support given collectively with other Federations provided through JFMD's "core" funding, which serves more than 150,000 older adults throughout the Former Soviet Union.

While it is true that Israel's economic conditions have improved in recent years, the rise in living standards has not been enjoyed by everyone, particularly among new immigrants and the country's Haredi and Arab populations. Although poverty rates have declined in recent years, 1 out of 5 Israeli families lives below the poverty line, which is among the highest rates compared to other developed countries around the world. One in five working age Israelis are not part of the labor market. The peripheries of the country, including areas such as Detroit's Partnership communities in the Central Galilee, are disproportionately affected. An increased focus over the past few years has been on creating a path to employment for the Haredi population, which makes up approximately 12% of the Israeli population, and together with Israeli Arabs, constitutes the fastest growing portion of Israel's population.

JFMD is in its second year of helping to pilot an initiative, targeting young Haredi men ages 17-22, that is supported through the American Joint Jewish Distribution Committee's (JDC's) Hanoch program. The goal of the pilot is to offer approximately 1,400 young Haredi men, who are not well suited to a life of study, in approximately 20 yeshivas, an alternate path, enabling them to earn a living for themselves and their families, and to break out of a cycle of poverty. Hanoch offers them additional education in core subjects and gives them the tools and access to acquire vocational skills, to pursue advanced education, and to obtain higher paying jobs. Thus far, 1,100 young men have entered the program.

An added dimension of Detroit's support in Israel is the potential for programs supported by the Federation to create opportunities for engaging Detroit participation. This year, an allocation is being recommended to bring a Community Shaliach, trained by the Jewish Agency for Israel (JAFI), to Detroit to work with the Federation, its agencies and local synagogues. A Shlichah will bring a personal Israeli presence to the Jewish community, and deepen Detroiters' understanding of and connection to Israel. The overseas allocation also continues to support other activities which link the Detroit Jewish community to Israel and encourage community involvement. Those most prominent are Partnership 2Gether, the Israel Camper Program with Tamarack and the "Mifgash" (Israeli participants) on our Birthright and Teen Missions.

In recent years, the IOC has recommended funding for programs which attempt to foster connections between young adults, both in our Partnership Region and, over the last two years, in Lod. Lod, while located in the center of the country, between Tel Aviv and Jerusalem, has long been troubled as a center of political corruption, crime and ethnic tension. The city has elected a new government and over the last few years, there has been a resurgence led largely by young adults, who are motivated by both their feelings of political justice, as well as their personal desires to find more affordable living conditions. This trend closely parallels what has been seen in the City of Detroit in recent years. The Federation is supporting a framework, "Better Together," which is organizing these groups and working together with the new mayor and the Lod municipality to address the needs of the city's multi-ethnic population, re-vitalize two of its neighborhoods and create safe and productive outlets for children and youth.

The Federation also 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 incubate new approaches, ultimately leading to systemic change. Examples in past years have included: PACT – Netanya, Youth Futures and Haredi Employment Program (Mafteach), to name only a few.

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

- 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 \$3 for every \$1 it allocates.
- Funded programs must have a business plan, including an “exit strategy” for Detroit’s funding and a plan to sustain support once it ends. This year, \$174,000 in funding has been sunset, allowing the Federation to fund new initiatives.
- Each program should have identified and measurable goals.

Campaign allocations are broken down into 3 categories, other than the Challenge Fund, which has been designated by donors to support specific programs:

- **“Core” unrestricted allocations**, which are Detroit’s portion of its collective responsibility with all North American Federations to support basic overseas needs addressed through its major overseas agencies: the Jewish Agency for Israel (JAFI), the American Joint Jewish Distribution Committee (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.
- **“Elective” programs**, which are community designated projects.
- **The Federation’s Operating Budget**, which in addition to funding its Israel and Overseas Department’s offices and programs, supported missions and exchanges to Israel and to other overseas Jewish communities world-wide.

## Allocations Tables

---

- Allocations Summary
- Israel and Overseas – [Attachment I](#)
- National Agencies – [Attachment II](#)
- Local Agencies – [Attachment III](#)
- Notes
- Local Allocations: Challenge Fund Breakdown – [Table I](#)
- Local Allocations: Challenge Fund Breakdown – [Table II](#)
- Total Federation/Foundation Support to Local Agencies:  
Projected for FY 2017-18 – [Attachment IV](#)

SUMMARY  
**JEWISH FEDERATION OF METROPOLITAN DETROIT**  
**PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS**  
**FISCAL YEARS ENDING MAY 31, 2017 AND 2018**

	FYE MAY 31, 2017			FYE MAY 31, 2018			INCREASE (DECREASE)		
	2016 ANNUAL CAMPAIGN	2016 CHALLENGE FUND	2016 TOTAL	2017 ANNUAL CAMPAIGN	2017 CHALLENGE FUND	2017 TOTAL	ANNUAL CAMPAIGN	CHALLENGE FUND	TOTAL
<b>CAMPAIGN ACHIEVEMENT</b>									
ANNUAL CAMPAIGN AND CHALLENGE FUND	30,800,000	3,300,000	34,100,000	31,800,000	3,166,640	34,966,640	1,000,000	(133,360)	866,640
SHRINKAGE ALLOWANCE	(795,000)	(32,000)	(827,000)	(822,500)	(25,000)	(847,500)	(27,500)	7,000	(20,500)
PRIOR YEAR'S OVER-ACHIEVEMENT	1,000,000	-	1,000,000	1,100,000	-	1,100,000	100,000	-	100,000
PRIOR YEAR'S UNALLOCATED FUNDS (OVERSEAS)	51,000	-	51,000	-	-	-	(51,000)	-	(51,000)
TRANSFER FROM CAMPAIGN TO CHALLENGE FUND	-	-	-	(875,000)	875,000	-	(875,000)	875,000	-
<b>TOTAL CAMPAIGN ACHIEVEMENT</b>	<b>31,056,000</b>	<b>3,268,000</b>	<b>34,324,000</b>	<b>31,202,500</b>	<b>4,016,640</b>	<b>35,219,140</b>	<b>146,500</b>	<b>748,640</b>	<b>895,140</b>
<b>CAMPAIGN ALLOCATIONS</b>									
ISRAEL AND OVERSEAS (SEE ATTACHMENT I)	8,635,530	430,000	9,065,530	8,616,430	353,800	8,970,230	(19,100)	(76,200)	(95,300)
NATIONAL AGENCIES (SEE ATTACHMENT II)	1,771,773	50,600	1,822,373	1,641,773	-	1,641,773	(130,000)	(50,600)	(180,600)
LOCAL AGENCIES (SEE ATTACHMENT III)									
JEWISH EDUCATION and IDENTITY	4,735,500	1,129,732	5,865,232	5,717,494	1,170,410	6,887,904	981,994	40,678	1,022,672
COMMUNITY SERVICES	4,487,727	909,269	5,396,996	4,518,310	736,570	5,254,880	30,583	(172,699)	(142,116)
ADDITIONAL LOCAL SUPPORT	11,425,470	748,399	12,173,869	10,708,493	1,755,860	12,464,353	(716,977)	1,007,461	290,484
TOTAL LOCAL SUPPORT	20,648,697	2,787,400	23,436,097	20,944,297	3,662,840	24,607,137	295,600	875,440	1,171,040
<b>TOTAL CAMPAIGN ALLOCATIONS</b>	<b>31,056,000</b>	<b>3,268,000</b>	<b>34,324,000</b>	<b>31,202,500</b>	<b>4,016,640</b>	<b>35,219,140</b>	<b>146,500</b>	<b>748,640</b>	<b>895,140</b>

ATTACHMENT I - ISRAEL AND OVERSEAS  
**JEWISH FEDERATION OF METROPOLITAN DETROIT**  
**PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS**  
**FISCAL YEARS ENDING MAY 31, 2017 AND 2018**

	FYE MAY 31, 2017			FYE MAY 31, 2018			INCREASE (DECREASE)		
	2016 ANNUAL CAMPAIGN	2016 CHALLENGE FUND	2016 TOTAL	2017 ANNUAL CAMPAIGN	2017 CHALLENGE FUND	2017 TOTAL	ANNUAL CAMPAIGN	CHALLENGE FUND	TOTAL
<b>CORE ALLOCATIONS</b>									
JAFI, JDC, and ORT	6,895,130	-	6,895,130	6,895,130	-	6,895,130	-	-	-
<b>TOTAL CORE ALLOCATIONS</b>	6,895,130	-	6,895,130	6,895,130	-	6,895,130	-	-	-
<b>ELECTIVE ALLOCATIONS</b>									
Partnership Together Central Galilee	757,000	-	757,000	757,000	-	757,000	-	-	-
P2G - Talma Bridge Grant	80,000	-	80,000	40,000	-	40,000	(40,000)	-	(40,000)
Municipal Intervention Partnership - Nazareth Illit	50,000	50,000	100,000	-	-	-	(50,000)	(50,000)	(100,000)
JDC Hanoch Haredi Employment Initiative	65,000	-	65,000	74,000	-	74,000	9,000	-	9,000
Youth Futures	25,000	-	25,000	-	-	-	(25,000)	-	(25,000)
Better Together - Lod	120,000	-	120,000	111,000	-	111,000	(9,000)	-	(9,000)
Venezuela Emergency Food/Medicine	-	-	-	30,000	-	30,000	30,000	-	30,000
Critical Services - Kiev	175,000	-	175,000	180,000	-	180,000	5,000	-	5,000
Community Shaliach	-	-	-	80,000	-	80,000	80,000	-	80,000
<b>TOTAL ELECTIVE ALLOCATIONS</b>	1,272,000	50,000	1,322,000	1,272,000	-	1,272,000	-	(50,000)	(50,000)
<b>ISRAEL AND OVERSEAS SERVICES</b>	468,400	-	468,400	449,300	-	449,300	(19,100)	-	(19,100)
<b>CHALLENGE FUND DESIGNATIONS</b>	-	380,000	380,000	-	353,800	353,800	-	(26,200)	(26,200)
<b>TOTAL ISRAEL AND OVERSEAS</b>	8,635,530	430,000	9,065,530	8,616,430	353,800	8,970,230	(19,100)	(76,200)	(95,300)

ATTACHMENT II - NATIONAL AGENCIES  
 JEWISH FEDERATION OF METROPOLITAN DETROIT  
 PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS  
 FISCAL YEARS ENDING MAY 31, 2017 AND 2018

	FYE MAY 31, 2017			FYE MAY 31, 2018			INCREASE (DECREASE)		
	2016 ANNUAL CAMPAIGN	2016 CHALLENGE FUND	2016 TOTAL	2017 ANNUAL CAMPAIGN	2017 CHALLENGE FUND	2017 TOTAL	ANNUAL CAMPAIGN	CHALLENGE FUND	TOTAL
JFNA Dues	1,294,832	-	1,294,832	1,183,432	-	1,183,432	(111,400)	-	(111,400)
Birthright Israel	211,790	50,600	262,390	211,790	-	211,790	-	(50,600)	(50,600)
National Federation Alliance	239,605	-	239,605	221,005	-	221,005	(18,600)	-	(18,600)
Anti-Defamation League	10,875	-	10,875	10,875	-	10,875	-	-	-
National Central Services	14,671	-	14,671	14,671	-	14,671	-	-	-
<b>TOTAL NATIONAL AGENCIES</b>	<b>1,771,773</b>	<b>50,600</b>	<b>1,822,373</b>	<b>1,641,773</b>	<b>-</b>	<b>1,641,773</b>	<b>(130,000)</b>	<b>(50,600)</b>	<b>(180,600)</b>



**ATTACHMENT III - LOCAL AGENCIES**  
**JEWISH FEDERATION OF METROPOLITAN DETROIT**  
**PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS**  
**FISCAL YEARS ENDING MAY 31, 2017 AND 2018**

	FYE MAY 31, 2017			FYE MAY 31, 2018			INCREASE (DECREASE)			
	2016 ANNUAL CAMPAIGN	2016 CHALLENGE FUND	2016 TOTAL	2017 ANNUAL CAMPAIGN	2017 CHALLENGE FUND	2017 TOTAL	8	ANNUAL CAMPAIGN	CHALLENGE FUND	TOTAL
<b>JEWISH EDUCATION &amp; IDENTITY (JEdI)</b>										
Farber Hebrew Day School	382,828	103,664	486,492	349,813	128,664	478,477	9	(33,015)	25,000	(8,015)
Hillel Day School	566,320	118,287	684,607	553,701	111,315	665,016	9	(12,619)	(6,972)	(19,591)
Yeshiva Beth Yehudah	714,379	162,145	876,524	741,867	161,145	903,012	9	27,488	(1,000)	26,488
Yeshiva Gedolah	102,210	19,597	121,807	92,471	19,597	112,068	9	(9,739)	-	(9,739)
Yeshivas Darchei Torah	209,460	46,687	256,147	244,317	49,187	293,504	9	34,857	2,500	37,357
Congregational School Funding	373,516	76,755	450,271	373,516	76,755	450,271		-	-	-
BBYO	58,652	11,436	70,088	58,652	11,436	70,088		-	-	-
Fresh Air Society/Tamarack Camps	409,864	104,198	514,062	409,864	83,378	493,242		-	(20,820)	(20,820)
Hillel Foundations										
Hillel of Metro Detroit	140,709	32,477	173,186	140,709	33,227	173,936		-	750	750
MSU Hillel/Michigan Jewish Conference	191,782	33,108	224,890	191,782	33,108	224,890		-	-	-
HCAM	49,156	10,029	59,185	60,129	-	60,129		10,973	(10,029)	944
Michigan Hillel at University of Michigan	137,310	35,703	173,013	137,310	29,453	166,763		-	(6,250)	(6,250)
Jewish Community Center	1,289,314	375,646	1,664,960	1,289,314	433,145	1,722,459		-	57,499	57,499
JCC Education Department	-	-	-	964,049	-	964,049	10	964,049	-	964,049
Mission Subsidies	110,000	-	110,000	110,000	-	110,000		-	-	-
<b>TOTAL JEWISH EDUCATION &amp; IDENTITY</b>	<b>4,735,500</b>	<b>1,129,732</b>	<b>5,865,232</b>	<b>5,717,494</b>	<b>1,170,410</b>	<b>6,887,904</b>		<b>981,994</b>	<b>40,678</b>	<b>1,022,672</b>

**ATTACHMENT III - LOCAL AGENCIES**  
**JEWISH FEDERATION OF METROPOLITAN DETROIT**  
**PROPOSED CAMPAIGN AND CHALLENGE FUND ALLOCATIONS**  
**FISCAL YEARS ENDING MAY 31, 2017 AND 2018**

	FYE MAY 31, 2017				FYE MAY 31, 2018				INCREASE (DECREASE)			
	2016 ANNUAL CAMPAIGN	2016 CHALLENGE FUND	2016 TOTAL	2017 ANNUAL CAMPAIGN	2017 CHALLENGE FUND	2017 TOTAL	8	ANNUAL CAMPAIGN	CHALLENGE FUND	TOTAL		
<b>COMMUNITY SERVICES</b>												
Hebrew Free Loan	108,731	22,042	130,773	108,731	22,042	130,773		-	-	-		
Hebrew Free Loan (Student Loans)	19,013	3,907	22,920	19,013	3,907	22,920		-	-	-		
JCRC/AJC	277,246	54,737	331,983	277,246	54,737	331,983		-	-	-		
Jewish Family Service	2,323,453	475,093	2,798,546	2,323,453	397,594	2,721,047		-	(77,499)	(77,499)		
Jewish Senior Life	390,106	143,597	533,703	390,106	79,097	469,203		-	(64,500)	(64,500)		
JVS	1,119,989	209,893	1,329,882	1,150,572	179,193	1,329,765	11	30,583	(30,700)	(117)		
In-Home Support Services (JSL and JFS)	18,750	-	18,750	18,750	-	18,750		-	-	-		
Foundation for Our Jewish Elderly	230,439	-	230,439	230,439	-	230,439	12	-	-	-		
<b>TOTAL COMMUNITY SERVICES</b>	<b>4,487,727</b>	<b>909,269</b>	<b>5,396,996</b>	<b>4,518,310</b>	<b>736,570</b>	<b>5,254,880</b>		<b>30,583</b>	<b>(172,699)</b>	<b>(142,116)</b>		
<b>ADDITIONAL LOCAL SUPPORT</b>												
Community Security Program	307,600	-	307,600	296,866	-	296,866		(10,734)	-	(10,734)		
Other Direct Services	497,572	-	497,572	610,786	-	610,786	4	113,214	-	113,214		
Agency Incentive Grants from Super Sunday	5,201	-	5,201	4,618	-	4,618		(583)	-	(583)		
Community Development/Engagement	761,685	5,000	766,685	766,500	7,500	774,000	4	4,815	2,500	7,315		
Community Development/Education	1,005,809	-	1,005,809	-	-	-	4	(1,005,809)	-	(1,005,809)		
Strategic Planning and Partnerships	456,356	-	456,356	415,120	-	415,120	4	(41,236)	-	(41,236)		
Support Services	1,545,679	-	1,545,679	1,529,746	-	1,529,746	13	(15,933)	-	(15,933)		
Agency Support to Cover Rent for UJF Facilities	4,000,000	-	4,000,000	4,000,000	-	4,000,000	14	-	-	-		
Campaign Expenses	105,568	-	105,568	102,068	-	102,068	15	(3,500)	-	(3,500)		
Capital Needs Fund Grant	1,200,000	250,000	1,450,000	1,200,000	1,235,000	2,435,000		-	985,000	985,000		
Endowment Fund Matching Grants	1,300,000	-	1,300,000	1,300,000	-	1,300,000	16	-	-	-		
Campaign Reserve	-	100,000	100,000	-	-	-		-	(100,000)	(100,000)		
Designations	240,000	393,399	633,399	482,789	513,360	996,149		242,789	119,961	362,750		
<b>TOTAL ADDITIONAL LOCAL SUPPORT</b>	<b>11,425,470</b>	<b>748,399</b>	<b>12,173,869</b>	<b>10,708,493</b>	<b>1,755,860</b>	<b>12,464,353</b>		<b>(716,977)</b>	<b>1,007,461</b>	<b>290,484</b>		
<b>TOTAL LOCAL AGENCIES</b>	<b>20,648,697</b>	<b>2,787,400</b>	<b>23,436,097</b>	<b>20,944,297</b>	<b>3,662,840</b>	<b>24,607,137</b>		<b>295,600</b>	<b>875,440</b>	<b>1,171,040</b>		

## NOTES

1. Shrinkage allowance of 2.5%, determined by Federation's Finance Committee, based on pledges for Annual Campaign and Challenge Fund.
2. In 2009, the IOC created a contingency fund to be used to pay multiple year program commitments in the event of future allocation reductions and to help seed new programs. The \$51,000 allocated in FY 2016-17 depleted the fund.
3. The Board of Governors approved Campaign and Challenge Fund allocation parameters in April. These were based on an additional projected Campaign achievement of \$875,000. The 2017 Challenge Fund achievement has primarily been comprised of designations, a large majority of which are for capital needs, thereby reducing the amount of unrestricted dollars. This created a shortfall of \$875,000 in agency base Challenge Fund allocations. The \$875,000 of additional Campaign achievement was transferred to the Challenge Fund, which enabled base Campaign and Challenge Fund allocations in the aggregate to be maintained at FY 2016-17 levels. However, the agencies will not receive a renewal of the special one-time grants that they received in 2016-17. These had included grants to a number of agencies including \$200,000 in grants to the Jewish Community Center, Jewish Family Service, Jewish Senior Life and JVS.
4. Includes Federation's operating budget (support services and direct program costs) and other local support for agencies.
5. Scheduled multi-year phased sunset of funding.
6. Amount contributed from the Federation Operating Budget to operate Israel Offices in Detroit and Jerusalem.
7. Reduction in FY 2017-18 JFNA dues is due to FY 2016-17 dues having included a one-time payment towards the dues obligation for FY 2015-16.
8. Allocations of \$3,662,840 in Challenge Fund dollars for FY 2017-18 include: 1) General Grants given to the agencies historically as part of their Campaign allocations: \$1,635,000; 2) Donor Designations given in accordance with the explicit instructions of the donors: \$2,027,840 and 3) Special Grants given to address high priority needs that cannot be handled by the normal Campaign allocation. There are no Challenge Fund Special Grants for FY 2017-18. **Please see Tables I and II for the breakdown of Challenge Fund allocations.**
9. Due to a generous contribution, Frankel Jewish Academy has been able to meet their financial strategic plan for FY 2017-18, allowing funds to be redirected toward vital community needs.

Annual allocations to the day schools have generally been based on historical allocations. To create more equity in allocations, the Jewish Education & Identity Division recommended that over the next four years, Federation begin phasing in a new formula for day school allocations in which by year four, 50% will be based on the percentage of a school's enrollment of the total day school enrollment and 50% based on historical allocations. The phase-in will begin in FY 2017-18, with the allocation based 20% on the percentage of a school's enrollment of the total FY 2016-17 day school enrollment and 80% based on historical allocations. This new process will be evaluated annually and may be modified depending on the findings. Any negative impact of this change on specific schools is primarily mitigated due to the Federation's having secured additional support for day schools, beyond the Annual Campaign, over the past year.
10. In the allocations for Jewish Education and Identity is a line item with an additional allocation to the Jewish Community Center for the transition of the Federation Education Department to the JCC. This is offset by an allocation reduction for Additional Local Support.
11. A special allocation was made to maintain a program, which suffered significant government funding cuts, for adults with disabilities.
12. Distribution to the Foundation for Our Jewish Elderly to support in-home support services, escorted transportation and adult day care.
13. Costs related to Federation/Foundation operating budget, net of management fees and direct income. These expenses support annual initiatives that helped raised \$60.1 million (as of March, 2017) in additional funds for local programs beyond the Annual Campaign, including (a) \$50.4 million for Support Foundations and Philanthropic Funds, (b) \$7.5 million for Restricted Funds and Planning Giving Vehicles, and (c) \$2.2 million for PACE Funds.
14. Agencies occupying space owned by the United Jewish Foundation 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 Federation an allocation for the amount of the rent collected. (There are no cash exchange implications.) This process creates greater financial transparency.
15. Costs related to credit card fees.

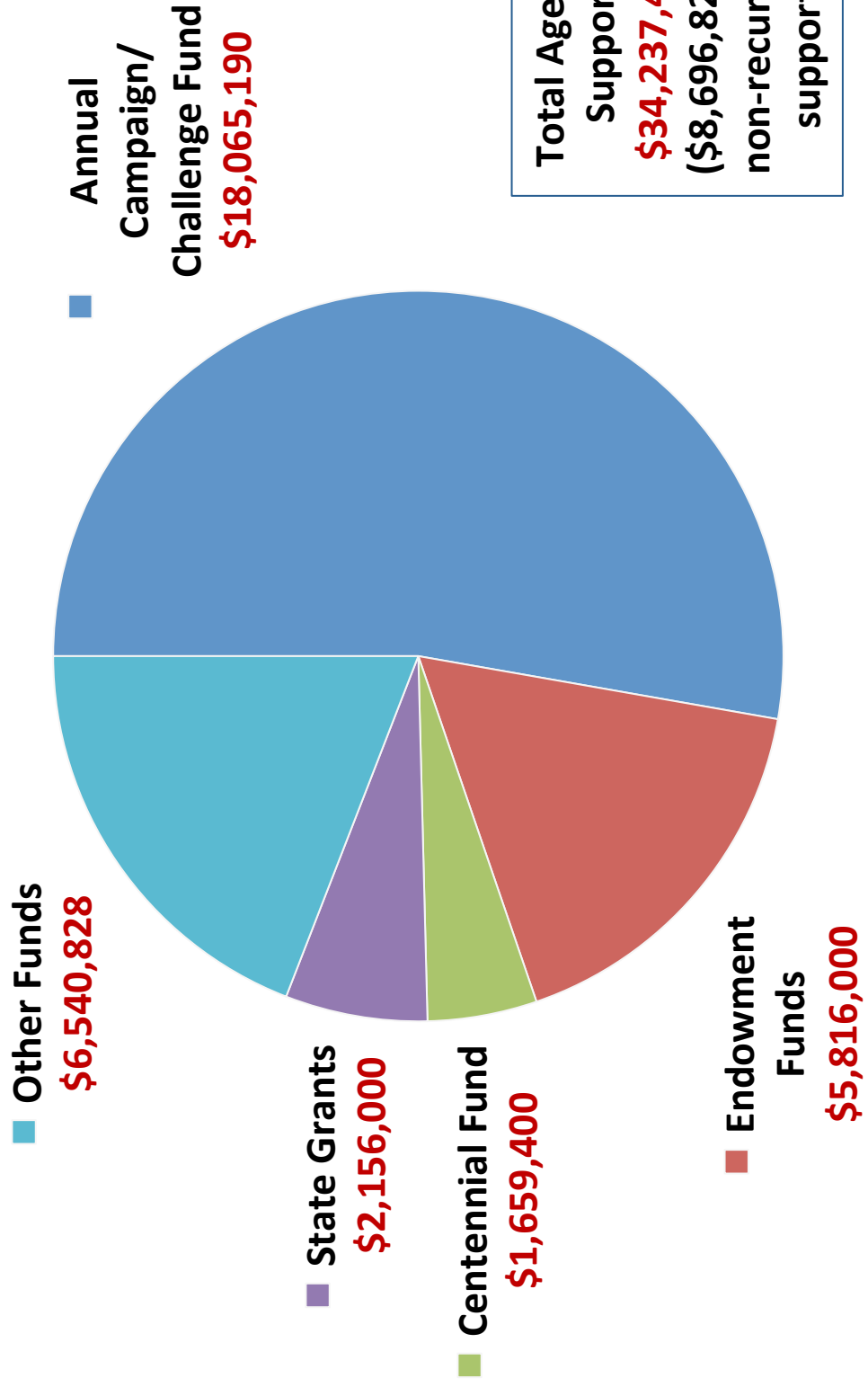
**TABLE I: LOCAL ALLOCATIONS**  
**JEWISH FEDERATION OF METROPOLITAN DETROIT**  
**CHALLENGE FUND BREAKDOWN**  
**FISCAL YEARS ENDING MAY 31, 2017 and 2018**

	2016 Challenge Fund General Allocations	2016 Challenge Fund Donor Designations	2016 Challenge Fund Special Grants	2016 TOTAL CHALLENGE FUND	2017 Challenge Fund General Allocations	2017 Challenge Fund Donor Designations	2017 TOTAL CHALLENGE FUND
<b>JEWISH EDUCATION &amp; IDENTITY (Jedi)</b>							
Farber Hebrew Day School	73,664	30,000	-	103,664	73,664	55,000	128,664
Hillel Day School	99,825	10,000	8,463	118,288	101,315	10,000	111,315
Yeshiva Beth Yehudah	133,908	11,000	17,237	162,145	151,145	10,000	161,145
Yeshiva Gedolah	19,597	-	-	19,597	19,597	-	19,597
Yeshivas Darchei Torah	38,940	-	7,747	46,687	46,687	2,500	49,187
Congregational School Funding	76,755	-	-	76,755	76,755	-	76,755
BBYO	11,436	-	-	11,436	11,436	-	11,436
Fresh Air Society/Tamarack Camps	83,198	16,000	5,000	104,198	83,198	180	83,378
Hillel Foundations							
Hillel of Metro Detroit	27,477	-	5,000	32,477	27,477	5,750	33,227
MSU Hillel/Michigan Jewish Conference	28,108	5,000	-	33,108	28,108	5,000	33,108
HCAM	-	-	10,029	10,029	-	-	-
Michigan Hillel at University of Michigan	27,703	-	8,000	35,703	27,703	1,750	29,453
Jewish Community Center	253,145	22,500	100,000	375,645	253,145	180,000	433,145
JCC Education Department	-	-	-	-	-	-	-
Mission Subsidies	-	-	-	-	-	-	-
<b>TOTAL JEWISH EDUCATION &amp; IDENTITY</b>	<b>873,756</b>	<b>94,500</b>	<b>161,476</b>	<b>1,129,732</b>	<b>900,230</b>	<b>270,180</b>	<b>1,170,410</b>

**TABLE II: LOCAL ALLOCATIONS**  
**JEWISH FEDERATION OF METROPOLITAN DETROIT**  
**CHALLENGE FUND BREAKDOWN**  
**FISCAL YEARS ENDING MAY 31, 2017 and 2018**

	2016 Challenge Fund General Allocations	2016 Challenge Fund Donor Designations	2016 Challenge Fund Special Grants	2016 TOTAL CHALLENGE FUND	2017 Challenge Fund General Allocations	2017 Challenge Fund Donor Designations	2017 TOTAL CHALLENGE FUND
<b>COMMUNITY SERVICES</b>							
Hebrew Free Loan	22,042	-	-	22,042	22,042	-	22,042
Hebrew Free Loan (Student Loans)	3,907	-	-	3,907	3,907	-	3,907
JCRC/AJC	54,737	-	-	54,737	54,737	-	54,737
Jewish Family Service	397,593	37,500	40,000	475,093	397,594	-	397,594
Jewish Senior Life	79,097	34,500	30,000	143,597	79,097	-	79,097
JVS	177,393	2,500	30,000	209,893	177,393	1,800	179,193
In-Home Support Services (JSL and JFS)	-	-	-	-	-	-	-
Foundation for Our Jewish Elderly	-	-	-	-	-	-	-
<b>TOTAL COMMUNITY SERVICES</b>	<b>734,769</b>	<b>74,500</b>	<b>100,000</b>	<b>909,269</b>	<b>734,770</b>	<b>1,800</b>	<b>736,570</b>
<b>ADDITIONAL LOCAL SUPPORT</b>							
Community Security Program	-	-	-	-	-	-	-
Other Direct Services	-	-	-	-	-	-	-
Agency Incentive Grants from Super Sunday	-	-	-	-	-	-	-
Community Development/Engagement	-	5,000	-	5,000	-	7,500	7,500
Community Development/Education	-	-	-	-	-	-	-
Strategic Planning and Partnerships	-	-	-	-	-	-	-
Support Services	-	-	-	-	-	-	-
Agency Support to Cover Rent for UJF Facilities	-	-	-	-	-	-	-
Campaign Expenses	-	-	-	-	-	-	-
Capital Needs Fund Grant	-	250,000	-	250,000	-	1,235,000	1,235,000
Campaign Reserve	-	-	100,000	100,000	-	-	-
Endowment Fund Matching Grants	-	-	-	-	-	-	-
Designations	-	392,900	499	393,399	-	513,360	513,360
<b>TOTAL ADDITIONAL LOCAL SUPPORT</b>	<b>-</b>	<b>647,900</b>	<b>100,499</b>	<b>748,399</b>	<b>-</b>	<b>1,755,860</b>	<b>1,755,860</b>
<b>TOTAL LOCAL AGENCIES</b>	<b>1,608,525</b>	<b>816,900</b>	<b>361,975</b>	<b>2,787,400</b>	<b>1,635,000</b>	<b>2,027,840</b>	<b>3,662,840</b>

**Attachment IV**  
**Total Federation/Foundation Support to Local Agencies**  
**Projected for FY 2017-18**



**Total Agency Support**  
**\$34,237,418**  
 (\$8,696,828 is non-recurring support)

# Jewish Assistance NETWORK

An answer for those  
who need help



**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.

**Services are confidential and many are provided free or on a sliding payment scale.**

[jewishdetroit.org/help](http://jewishdetroit.org/help) • (248) 592-2650

# 2

SIMPLE STEPS TO FINDING A  
**MEANINGFUL**  
**VOLUNTEER**  
**OPPORTUNITY**

## Step 1

Go to:  
[ivolunteerjewishdetroit.org](http://ivolunteerjewishdetroit.org),  
our community volunteer  
website and browse through  
our listings of organizations  
and activities.

## Step 2.

Select volunteer  
opportunities that  
fit your interests  
and schedule.

**Sign up now!**

Become a volunteer, enrich your life,  
help others in need, find your passion,  
and strengthen our Detroit Jewish Community.

**Come take a look. [ivolunteerjewishdetroit.org](http://ivolunteerjewishdetroit.org)**













Jewish Federation of Metropolitan Detroit  
P.O. Box 2030  
Bloomfield Hills, MI 48303-2030  
248-642-4260  
[jewishdetroit.org](http://jewishdetroit.org)

