

JEWISH UNITED FUND *of* METROPOLITAN CHICAGO

Resource Development Policy Guidelines 2017–2018

JUF RDP Questions?

Contact 312-444-2834 or 312-357-4804

Events Database Questions?

Email: EventsDatabase@juf.org

Revised July 1, 2017

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Resource Development Policy (RDP) Guidelines

PURPOSE

Community needs, locally and globally, require the maximum mobilization and coordination of our communal resources. This is a core objective of JUF, and our Jewish community's primary source of raising funds is the JUF Annual Campaign. JUF recognizes that each Agency and Day School has its own urgent, consistent need to raise money, and the JUF RDP Committee and professionals attempt to coordinate and manage community campaigns so both the Agency/Day School campaigns and the JUF Annual Campaign can be successful.

The purpose of these guidelines is to structure and centralize fundraising efforts for our donors and the community, to maximize dollars raised on all fronts, to reduce conflicts between JUF and Agency fundraising efforts and also to advocate—on JUF's behalf—the primacy and efficiency of the JUF Annual Campaign to meet our community's needs.

The following guidelines are designed to establish a coordinated fundraising process in the best interest of the overall Chicago Metropolitan Jewish community. We thank you in advance for your understanding and cooperation. We highly recommend that whenever there is a new development professional at your Agency/Day School, he/she contact JUF so we can schedule an orientation to these guidelines. This is meant to facilitate a good working relationship.

All Agencies or their affiliates that receive financial support from the Jewish Federation through the Jewish United Fund Annual Campaign (hereafter called "JUF") (**see Exhibit I**), require prior written approval of the JUF/Federation Board of Directors, or the Committee or Officers thereof to whom authority to provide such approval is delegated, to raise funds, regardless of amount, or engage in any fundraising activity, in the Metropolitan Chicago area, for maintenance or capital purposes, or any other purpose. This includes overseas Agencies and organizations that receive funding from JUF either directly or indirectly through JUF's partner Agencies.

For the purpose of this document, "Agency" will hereafter refer to all Affiliate, Beneficiary and Grantee Agencies (including Day Schools) of the Jewish United Fund/Jewish Federation of Metropolitan Chicago (hereafter called "JUF/Federation"). This includes overseas Agencies and organizations that receive funding from JUF either directly or indirectly through JUF's partner Agencies.

Simply put, compliance with these guidelines allows the Annual Campaign to raise a maximum amount of dollars, year after year, in our community. Those dollars are the single largest source of revenue for the allocations made to Agencies and programs throughout our community and overseas.

Please contact 312-444-2834 or 312-357-4804 with any questions.

PARTNERSHIP

JUF/JF PARTNERSHIP LANGUAGE

As an expression of the mutually beneficial partnership between Agencies/Day Schools and JUF, all materials for Agencies/Day Schools and auxiliaries, whether printed or electronic, are required to include the following partnership language, which lends greater credibility to the Agency and helps brand JUF to those who might not know the connection. **The partnership language should be clearly legible and should be the larger of the smallest (non-tagline) font used on the materials/websites and eight-point type:**

"A partner with the Jewish United Fund in serving our community."

Examples of where partnership language should appear:

<i>Ad books</i>	<i>Endowment promotional materials</i>	<i>Newsletters</i>
<i>Advertisements</i>	<i>Invitations</i>	<i>Posters</i>
<i>Annual reports</i>	<i>Letters of solicitation</i>	<i>Programs</i>
<i>E-blasts (e.g., Constant Contact)</i>	<i>Letterhead/stationery</i>	<i>Websites</i>
<i>E-signatures (if they contain a link to the agency site or an option to donate to the agency online)</i>	<i>Marketing materials</i>	

Please contact 312-444-2834 or 312-357-4804 with any questions.

IMPORTANT DATES

JUF CAMPAIGN PERIOD

From April 1 through JUF Country Club Day (typically the third Wednesday in June), thousands of community members attend JUF events and donate millions of dollars to our community campaign, which, in turn, are allocated out to help provide essential services through our Agencies and Day Schools.

Because this is JUF's heavy events season, Agencies and their auxiliaries are not to hold any fundraising activities (e.g., solicitation letters, e-solicitations, events, save the date notices, web postings) from April 1* through JUF Country Club Day.

- In 2018, the JUF Campaign period is Monday, April 2–Wednesday, June 13.
- In 2019, the JUF Campaign period is Monday, April 1–Wednesday, June 19.

* Note that if April 1 falls on a weekend, the JUF Campaign period begins the Monday following the weekend.

- If an Agency's event falls within **eight weeks** after the end of the JUF Campaign period, the Agency may promote its event up to **eight weeks** before the event date, even if this falls during the JUF Campaign period.

- Jewish organizations that do not receive financial support from the JUF are urged to cooperate and, in particular, to avoid conflict in their campaign and fundraising event dates with those of JUF during the JUF Campaign period.

In addition, Agencies' and their auxiliaries' events may **not** be scheduled on the dates of the:

- **JUF Women's Division Lion Luncheon** (typically mid-September/October)
 - *In 2017, the date is Wednesday, September 6.*
- **JUF Advance & Major Gifts Dinner** (typically late October/early November)
 - *In 2017, the date is Wednesday, September 27.*
- **JUF Vanguard Dinner** (typically late October/early November)
 - *In 2017, the date is Tuesday, November 7.*

Volunteer and professional leadership are urged to explain and support the Jewish United Fund's need for primacy in scheduling events.

JUF may conduct public fundraising activities throughout the year.

CALENDAR

- **July 2017**—Updated Guidelines and Community Funding Schedule Approvals sent
- **Wednesday, September 6, 2017**—JUF Women's Division Lion of Judah Luncheon
- **Monday, September 18, 2017**—Jewish Federation Annual Meeting
- **Wednesday, September 27, 2017**—JUF Advance & Major Gifts Dinner
- **Tuesday, November 7, 2017**—JUF Vanguard Dinner
- **Monday, April 2–Wednesday, June 13, 2018**—**JUF Campaign period**
- **April 2018**—Budget Submission Materials, including Community Funding Schedules, typically due. The exact dates vary each year and are based on the Agency. For more information, contact the Jewish Federation's Planning & Allocations Department
- **July 2018**—Updated Guidelines and Community Funding Schedule Approvals sent
- **Monday, April 1–Wednesday, June 19, 2019**—**JUF Campaign period**

END-OF-YEAR APPEALS

A few years ago, we noticed an extremely high number of Year-End Appeals that were not listed on the Community Funding Schedule (CFS) and/or not approved prior to distribution by JUF RDP professionals. This produced some confusion and donor fatigue in the community, two of the principle outcomes we all work to avoid through a single community annual campaign at JUF.

Per the 2017-2018 Community Funding Schedules (CFS), the following end-of-year (EOY) appeals have been approved for December 2017:

- **Akiba Schechter Jewish Day School**—one December email
- **The ARK**—one December mailing
- **Cheder Lubavitch Hebrew Day School**—one Chanukah mailing
- **Chicago Jewish Day School**—one Chanukah mailing
- **CJE SeniorLife**—one December mailing and one December email
- **Hebrew Theological College**—banquet/ad book
- **Ida Crown Jewish Academy**—one Chanukah appeal
- **Illinois Holocaust Museum & Education Center**—one December appeal
- **Jewish Child & Family Services (incl. Response, Encompass and HIAS)**—one December mailing and one December email
- **Jewish Community Centers**—one December mailing, one December email and one annual report online publication/giving reminder
- **Jewish Vocational Services**—one December mailing and one December email
- **Maot Chitim**—one December EOY solicitation
- **Rochelle Zell Jewish High School**—one December mailing and email to parents and one to non-parents
- **SHALVA**—one December mailing and newsletter and one December social media appeal
- **Solomon Schechter Day School**—one year-end countdown email
- **Spertus**—one Chanukah mailing and one EOY email

While we recognize that the end of the year is important for our Agencies and Day Schools, if your appeal is not listed above, sending a year-end appeal will be in violation of the JUF RDP Guidelines and will run the risk of diminishing the effectiveness of the largest single source of revenue we all depend on.

If your appeal is listed above, JUF RDP professionals still need to see and approve all materials prior to printing and/or distributing. The approval of an appeal indicates that you may send the **one** letter and/or e-mail listed above. It is not a blanket approval for multiple direct response efforts in December.

PLANNING

COMMUNITY FUNDING SCHEDULE (CFS)

The Community Funding Schedule (CFS) is the document that is enclosed in the Budget Submission Materials that should list all fundraising activities/plans for an Agency/Day School during the upcoming fiscal year.

The CFS should include anticipated revenues and expenses for each fundraising activity and report the totals from the year's efforts.

CFS submissions are reviewed/approved by JUF's RDP Committee, and subject to the review/approval of the JUF/Federation Board of Directors. JUF RDP professionals will notify the Agency regarding the outcome of the overall review process each July.

The CFS serves as a blueprint for the year ahead. Asking to add an extra mailing, email, etc. **AFTER** the Committee has reviewed and approved your CFS will be difficult, so please try to anticipate in advance, any fundraising activities you think you may want to do. Fundraising activities can only be changed by submitting a request for review by JUF RDP professionals, and/or the Committee.

For a copy of a Community Funding Schedule, please see **Exhibit II**. For a sample, see **Exhibit III**.

Please contact 312-444-2834 or 312-357-4804 with any questions.

JUF EVENTS DATABASE

JUF's automated "Community Calendar" is referred to as the "Events Database."

When scheduling a significant Jewish community-wide event, you are required to consult with the Events Database first in order to avoid scheduling conflicts with JUF and other community organizations/agencies.

To find out which events already are scheduled for a date you are considering or to place and/or make changes to your organization's event, visit www.juf.org/EventsDatabase.

If you need assistance and/or access to the Events Database, please email EventsDatabase@juf.org.

FUNDRAISING

SOLICITATIONS/CLEARING NAMES/SUBMITTING MATERIALS

We request that Agencies/Day Schools clear with JUF RDP professionals the names of all individuals, corporations, and foundations to be solicited for more than **\$5,000**.

Please know that this policy change reflects ongoing and fruitful efforts among Agency and JUF lay and professional leaders to enhance the spirit of collaboration and mutual respect that our Jewish community exemplifies. Indeed the purpose of JUF's Resource Development Guidelines is to assure that the interests of all segments of our community are best served.

When submitting your list of names, please include the donors' addresses, the year and amount of the donors' most recent gift to the Agency, as well as the dollar amount for which you will be soliciting the donor(s). Please allow JUF RDP professionals **up to three weeks** to get back to you with approvals.

Event materials, mailings, email blasts, web donate pages, etc., may continue to request contributions (i.e., have checkboxes) up to **\$500**. In addition to feeling that public appeals are not consistent with best practices for raising significant dollars from donors, we believe that the current **\$500** ceiling on published materials and websites reinforces the primacy of the JUF Annual Campaign. Websites/other materials that ask for monthly (or other non-annual) donations must ensure that the highest ask does not exceed **\$500/year** (e.g., \$42/month).

As has been the policy, please continue to submit all solicitation materials to JUF RDP professionals for review and approval before printing and distributing, and please continue to avoid fundraising conflicts during JUF's heavy events season/Campaign period.

GENERAL EVENT INFORMATION

The written approval of the JUF RDP Committee is required for any fundraising event or campaign and is to be secured before obtaining commitments from specific honorees or guest speakers.

Groups with honorees should clear the names and what the honorees will be asked for (e.g. the financial contribution to the organization) with JUF RDP professionals **prior to contacting the honorees.**

Subject to such prior written approval, each Agency and each of its auxiliaries will be permitted to hold **one major (community-wide) event per year** between the day after JUF Country Club Day of each year and March 31 of the following year (unless March 31 were to fall on a Saturday, in which case the period would begin Monday, April 2)—except for those additional dates listed in the “Important Dates” section of these JUF RDP guidelines. Other events on a parallel level of the major event (e.g. same or higher anticipated revenue) will be discouraged.

Note that the Campaign period in 2018 is Monday, April 2–Wednesday, June 13.

Prior to a major event, the Agency/Day School should be in touch with appropriate JUF professionals regarding remarks for the event that would include items such as acknowledgement of support from JUF, etc.

EVENT SPONSORSHIPS/LEVELS

Sponsorship should be limited to one community-wide, major fundraising/revenue raising event. This includes “event-less” events.

All sponsorship levels, societies, table sales, and/or ad requests must be submitted to JUF RDP professionals for approval **prior to** printing and distribution.

For the one community-wide major fundraiser, sponsorships may be solicited up to **\$5,000** without clearing names with JUF RDP professionals.

- If there are approved sponsorship levels above **\$5,000** (including levels that include pages in Ad Books, event tickets, raffle tickets, or any other item included with sponsorship), it is okay to list the **NAMES** of those levels, but **NOT** the dollar amounts. Levels above **\$5,000** should state: “Please call for more information.”
- When listing donors by giving level in a non-solicitation/donor recognition piece (e.g., Annual Report, Event Program), the Agency/Day School may list dollars or dollar ranges with giving levels.

After an event, an Agency/Day School must send JUF RDP professionals a list of sponsors and the amount of their sponsorship.

If an Agency/Day School has a second, “non-parallel” event (i.e., an event with projected revenue significantly less than the “major” event) and would like to solicit sponsors quietly, then any solicitations must first be cleared by JUF RDP professionals. These sponsorship opportunities may not be published, advertised, posted, etc. on event materials, websites, etc. before the event. At the event, however, there can be a sign/materials listing the event sponsors.

INVITATIONS

All invitations, whether printed or electronic, that relate to fundraising activities are to be submitted to JUF RDP professionals for approval **prior to** printing, posting and distributing.

The published cost of an event is not to exceed **\$500** per person.

Event materials may request contributions up to, but not to exceed, **\$500**.

Invitations and response cards—whether printed or electronic—cannot include statements asking for an open-ended contribution (e.g., “I would like to make a contribution of \$____.”).

Lesser amounts may be requested if listed in dollar descending order, followed by an open line for other contribution amounts (e.g., ___ \$500 ___ \$400 ___ \$300 ___ Other).

Invitations must contain **JUF partnership language**.

LETTERS OF SOLICITATION

All letters of solicitation are to be submitted to JUF RDP professionals for approval **prior to** printing and distribution.

The list of those being solicited through mailings for gifts over **\$500** are to be submitted for review by JUF RDP professionals and should be limited to 300 donors or less.

- When submitting your list of names, please include the donors’ addresses, the year and amount of the donors’ most recent gift to the Agency, as well as the dollar amount for which you will be soliciting the donor(s). Please allow JUF RDP professionals up to three weeks for approvals.

Letters of solicitation cannot include statements asking for an open-ended contribution (e.g., “I would like to make a contribution of \$____.”).

Lesser amounts may be requested if listed in dollar descending order, followed by an open line for other contribution amounts (e.g., ___ \$500 ___ \$400 ___ \$300 ___ Other).

Letters of solicitation must contain **JUF partnership language**.

WEBSITES

All policies that apply to printed materials also apply to electronic media, including websites, emails, social networking (e.g., Facebook, Twitter), mobile (e.g., text, SMS), online registration for events and memberships, and other new channels of communication.

All materials that refer people to or appear on website communications that relate to fundraising activities are to be submitted to JUF RDP professionals for approval prior to posting on the website.

Agencies and their auxiliaries may use website communications as a vehicle to publicize events, secure reservations and/or solicit contributions associated with an event.

Websites cannot include statements asking for an open-ended contribution (e.g., “I would like to make a contribution of \$____.”).

Websites may request contributions up to, but not exceeding, **\$500** (e.g., \$42/month).

Lesser amounts may be requested if listed in dollar descending order, followed by an open line for other contribution amounts (e.g., ___ \$500 ___ \$400 ___ \$300 ___ Other).

Websites must contain **JUF partnership language** and should include the JUF logo and link to the JUF website (www.juf.org).

AD BOOKS & RAFFLE TICKETS

Ad books and raffle tickets are to be submitted to JUF RDP professionals for approval **prior to** printing and distribution.

Ad book solicitations are permitted for amounts not to exceed **\$1,000** per person or firm.

Ad Books must contain **JUF partnership language**.

All raffle ticket prices and packages above **\$500** may not be listed unless cleared by JUF RDP professionals, and/or the Committee.

NEWSLETTERS

Any solicitations included in newsletters are to be included in each Agency's or auxiliary's Community Funding Schedule, and such solicitations are required to comply with the aforementioned guidelines.

Newsletters must contain **JUF partnership language**.

ANNUAL REPORTS

Annual reports are to be submitted to JUF RDP professionals for approval **prior to** printing and distribution.

All Agencies and their auxiliaries that produce annual reports will be required to include **JUF partnership language**.

When listing donors by giving level in a non-solicitation/donor recognition piece (e.g., Annual Report, Event Program), the Agency/Day School may list dollars or dollar ranges with giving levels.

MEMBERSHIPS

Agencies and their auxiliaries may solicit memberships for fundraising purposes, at a level not to exceed **\$100** per person (for an annual membership) or **\$1,000** (for a lifetime membership).

Memberships should not be solicited during the JUF Campaign period.

GOLF OUTINGS

Day Schools that wish to have a golf outing must submit to the JUF RDP Committee a detailed fundraising campaign plan for the school's parents and staff. The plan for the JUF parent campaign, as well as the details of the golf outing, must be approved **prior to** scheduling the golf outing, and materials must be approved.

Further, the golf outing may not occur within **eight weeks** of JUF Country Club Day and may not be promoted during the JUF Campaign period.

THIRD-PARTY FUNDRAISING

There have been some situations where well-meaning organizations or individuals would like to host a benefit on a beneficiary Agency/Day School's behalf. This can be problematic as the event may be during the JUF Campaign period, ads may not contain JUF taglines/partnership language, JUF may not endorse the speakers, honorees, fundraising activities, etc.

If individuals or organizations would like to fundraise (e.g., hold a benefit, send a mailing) on a beneficiary Agency/Day School's behalf, the beneficiary Agency should inform JUF RDP professionals as soon as possible so that we can work together to find out whether the fundraising activities can be in compliance with the JUF RDP Guidelines.

JUF RDP professionals may ask for copies of invitation lists, printed materials, etc., and may use this as an opportunity to re-visit the JUF RDP Guidelines, address Agency/Day School concerns, and teach those who are trying to help the Agency/Day School.

The fact that fundraising is being done on behalf of an Agency/Day School does not mitigate the JUF RDP Guidelines.

CROWDFUNDING OR SOCIAL MEDIA CAMPAIGNS

Crowdfunding and other social media campaigns should be submitted to JUF RDP professionals to review on a case-by-case basis to ensure that they are in compliance with the spirit of the JUF RDP Guidelines, which support unrestricted "annual" campaigns.

PROJECT-BASED/SUPPLEMENTAL/DESIGNATED/RESTRICTED CAMPAIGNS

ALL fundraising ideas that are not for the general unrestricted campaign of the Agency/Day School, must be reviewed by JUF RDP professionals, before being implemented.

Project-based/supplemental/designated/restricted campaigns that may/may not employ techniques like crowdfunding, are discouraged for the following reasons:

- Donors should not be inundated by multiple asks for various projects. JUF RDP professionals and the JUF RDP Committee serve to coordinate these asks so that we can maximize our donors' philanthropy to meet various communal needs, while being respectful to our donors;
- Between the centralized community campaign and an outstanding network of Agency partners, donors in our community expect all needs to be met. The process for identifying unmet needs is to work in partnership with JUF Planning & Allocations, which works with other JUF colleagues to fundraise for those needs through coordinating supplemental giving and the JUF Annual Campaign.

If you are still considering such an effort, you must contact JUF RDP professionals before moving forward.

Capital Fundraising, Endowments and Grants are each covered separately in the JUF RDP Guidelines.

OTHER

Any/all other forms of fundraising (e.g., face-to-face, phone, email, social networking, mobile/text/SMS) are subject to the aforementioned guidelines. Any questions should be directed to JUF RDP professionals at 312-444-2834 or 312-357-4804.

BY THE NUMBERS

\$100—Top individual annual membership amount

\$500—Maximum for:

- Checkboxes on fundraising materials (e.g., solicitation letters, email blasts, web donate pages)
- Event Ticket Prices/Cost per person
- Raffle Tickets Prices & Packages

\$1,000—Top individual lifetime membership amount; highest amount for Ad Book solicitations

\$5,000—Maximum for:

- Gift and Sponsorship solicitations that do not require clearing names with JUF RDP professionals (as long as these are **NOT** done during the JUF Campaign period)
- Listing Sponsorship Levels **with dollars** on event fundraising/promotional materials
 - Sponsorship levels above this level may list the level **name**, but not the dollar amounts

Three weeks—Amount of time to allow JUF RDP professionals to respond to solicitation and sponsorship approvals (over \$5,000)

Eight weeks—If an agency's event falls within **eight weeks** after the end of the Campaign period, the event may be promoted up to **eight weeks** before the event date, even if this falls during the JUF Campaign period.

CAPITAL FUNDRAISING, ENDOWMENTS & GRANTS

CAPITAL FUNDRAISING

Any Agency that receives funding from JUF/Federation must have its capital fundraising plans approved according to the Principles of Affiliation or Beneficiary Agreement in place and following the JUF/Federation Centennial guidelines.

Note that this has not applied to endowment campaigns. Agency/Day School can raise endowment dollars in cooperation with JUF/Federation Legacies & Endowments professionals.

If an Agency/Day School is considering a capital fundraising project, the **FIRST STEP** is to contact and discuss the project with the Planning & Allocations Department. This should be done **BEFORE** any solicitations are done, property is purchased or renovated, contracts are signed, etc.

Planning & Allocations staff will work with the Agency/Day School to assess the need and viability of the project, the capacity for the Agency/Day School board and the community to participate, etc.

Annual Reports and Websites should contain the following language: The _____ [Project] was created in partnership with the Jewish United Fund/Jewish Federation of Metropolitan Chicago and the _____ [Agency]. All commitments to the _____ [Project] are recognized as gifts to the Jewish Federation's Centennial Campaign.

AGENCY ENDOWMENT

Below are the uniform language guidelines for Agency endowment invitations, annual reports and program publications, whether such materials are printed or electronic, and on Agency websites where the endowment foundation is noted. **Please also include the JUF partnership language.**

As has been the policy, please continue to submit all solicitation materials to JUF RDP professionals for review and approval before printing and distributing, and please continue to avoid fundraising conflicts during JUF 's heavy events season/Campaign period.

Invitations: The _____ Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Agency Endowment Program.

Annual Reports and Websites: The _____ Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Agency Endowment Program, which was established to ensure that _____ and our sister Agencies have the necessary resources to meet community needs. All commitments to the _____ Foundation are recognized as gifts to the Jewish Federation's Centennial Campaign.

Agency Endowment Events and Programs: The _____ Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Agency Endowment Program, which was established to ensure that _____ and our sister Agencies have the necessary resources to meet growing and evolving Jewish community needs. All commitments to the _____ Foundation are recognized as gifts to the Jewish Federation's Centennial Campaign.

DAY SCHOOL ENDOWMENT

Below are the uniform language guidelines for day school endowment invitations, annual reports and program publications, whether such materials are printed or electronic, and on day school websites where the endowment foundation is noted. **Please also include the JUF partnership language.**

Invitations: The _____ Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Day School Endowment Program.

Annual Reports and Websites: The _____ Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Day School Endowment Program, which was established to ensure that _____ and our sister day schools have the necessary resources to meet community needs. All commitments to the _____ Foundation are recognized as gifts to the Jewish Federation's Centennial Campaign.

Day School Endowment Events Programs: The _____ Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Day School Endowment Program, which was established to ensure that _____ and our sister day schools have the necessary resources to meet growing and evolving Jewish community needs. All commitments to the _____ Foundation are recognized as gifts to the Jewish Federation's Centennial Campaign.

GRANTS

For funding requests to ALL foundations and to corporations, it is critical that we coordinate across departments and Agencies to ensure that contributions to the JUF Annual Campaign, JUF Corporate Partners and the system as a whole are maximized through the development of proposals that are responsive to funders' needs and careful stewardship (acknowledgement, reporting, etc.).

Please inform the JUF Community Program Development Team (previously JUF Grants Department) of all proposals to private foundations, corporations and/or government entities **before** the application is submitted. Ideally, consultation begins early on in the application process and allows for feedback on program outcomes, design and implementation. You may reach the CPD team by emailing SarahFollmer@juf.org.

There are a number of foundations—such as the Polk Bros. Foundation, Crown Family Foundation, Crown Family Philanthropies, Michael Reese Health Trust, Chicago Community Trust, Circle of Service Foundation and others—that have special processes in place and/or require that Agency proposals be submitted through the Federation.

Additionally, there are a number of **family foundations** for whom it is important for us to coordinate funding requests. In advance of these requests, please reach out to JUF RDP professionals as you would for individual donors.

Federation staff members have long-term relationships with many foundation officers and donors. We want to be prepared to field inquiries from them about Agency submissions and advocate on behalf of Agency applicants. We also may be able to offer advice on how to most successfully approach a particular funder.

Annually, all Agencies are asked to submit a summary of grants received during the year for inclusion into the JUF/Federation Annual Report.

For government submissions, we have the opportunity to involve Federation's Government Affairs staff and their relationships with government agencies and political representatives locally, in Springfield and/or Washington, D.C., in garnering critical support for Agency applications and possibly gathering intelligence about RFPs.

EXHIBIT I: Affiliates, Beneficiaries and Grantees Adhering to JUF Resource Development Policy Guidelines

HEALTH & HUMAN SERVICES

The ARK
CJE SeniorLife
Dina & Eli Field EZRA Multi-Service Center and the JUF Uptown Cafe
HIAS Chicago
Jewish Child and Family Services
JVS Chicago
Maot Chitim
Mount Sinai Hospital Medical Center
SHALVA

COMMUNITY BUILDING, JEWISH EDUCATION AND CULTURE

Associated Talmud Torahs (ATT)

Serving Community and Day Schools and Early Childhood Centers at:
Akiba-Schechter Jewish Day School, Arie Crown Hebrew Day School,
Joan Dachs Bais Yaakov Elementary School-Yeshivas Tiferes Tzvi,
Seymour J. Abrams Cheder Lubavitch Day School, Philip and Rebecca Esformes
Cheder Lubavitch Girls School, Hillel Torah North Suburban Day School,
Lubavitch Girls High School, Yeshiva Ohr Boruch-The Veitzner Cheder,
Ida Crown Jewish Academy, Hanna Sacks Bais Yaakov Girls High School,
Bais Yaakov Girls' High School

REACH Specialized Services in Day Schools

Chicago Jewish Day School
Rochelle Zell Jewish High School
Keshet
Jewish Community Center of Chicago
Hebrew Theological College
Fasman Yeshiva High School
Spertus Institute for Jewish Learning & Leadership
Telshe Yeshiva
Illinois Holocaust Museum and Education Center
Chicago Board of Rabbis
Jewish Community Council of West Rogers Park

**COMMUNITY RELATIONS
AND OTHER NATIONAL/LOCAL AGENCIES**

American Jewish World Service
Jewish Labor Committee
National Jewish Center for Learning and Leadership (CLAL)
America-Israel Cultural Foundation
Jerusalem Center for Public Affairs

EXHIBIT II: Blank Community Funding Schedule (CFS)

**Jewish Federation of Metropolitan Chicago
Community Funding Schedule**

Agency: BLANK CFS

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)*	(i)
Event Details - Period Ending 6/30/18 - Projected Totals									
1	Description of Event								
2	Sponsoring Unit								
3	Date of Event								
4	Charge Range								
5	Number of Persons								
6	Additional Income (1)								
6a	Description of Additional Income Source (1) including x units at x \$								
7	Additional Income (2)								
7a	Description of Additional Income Source (2) including x units at x \$								
Budget Request FYE 6/30/18									
8	Revenue								
9	Direct Expenses								
10	Net Income								
Event Details - Period Ending 6/30/17 - Actual Totals									
11	Description of Event								
12	Sponsoring Unit								
13	Date of Event								
14	Charge Range								
15	Number of Persons								
16	Additional Income (1)								
16a	Description of Additional Income Source (1) including x units at x \$								
17	Additional Income (2)								
17a	Description of Additional Income Source (2) including x units at x \$								
Actual FYE 6/30/17									
18	Revenue								
19	Direct Expenses								
20	Net Income								

*Explain Other (h) as an attachment

EXHIBIT III: Sample Community Funding Schedule (CFS)

**Jewish Federation of Metropolitan Chicago
Community Funding Schedule**

Agency: **SAMPLE**

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)*	(i)
Event Details - Period Ending 6/30/18 - Projected Totals									
1	Description of Event	Chanukah Mailing							
2	Sponsoring Unit								
3	Date of Event	11/18/17	2/8/18	3/29/18					
4	Charge Range		\$250						
5	Number of Persons	5,000	1,000	10,000					
6	Additional Income (1)		\$100,000						
6a	Description of Additional Income Source (1) including x units at x \$		Sponsors						
7	Additional Income (2)		\$50,000						
7a	Description of Additional Income Source (2) including x units at x \$		Ad Book						
Budget Request FYE 6/30/18									
8	Revenue	\$25,000	\$400,000	\$10,000	\$0	\$0			
9	Direct Expenses	\$7,500	\$125,000	\$0	\$0	\$0			
10	Net Income	\$17,500	\$275,000	\$10,000	\$0	\$302,500		\$15,000	\$317,500
Event Details - Period Ending 6/30/17 - Actual Totals									
11	Description of Event	Chanukah Mailing							
12	Sponsoring Unit								
13	Date of Event	11/27/16	2/5/17	3/26/17					
14	Charge Range		\$250						
15	Number of Persons	5,000	1,000	10,000					
16	Additional Income (1)		\$85,000						
16a	Description of Additional Income Source (1) including x units at x \$		Sponsors						
17	Additional Income (2)		\$35,000						
17a	Description of Additional Income Source (2) including x units at x \$		Ad Book						
Actual FYE 6/30/17									
18	Revenue	\$20,000	\$370,000	\$0	\$0	\$0			
19	Direct Expenses	\$7,500	\$115,000	\$0	\$0	\$0			
20	Net Income	\$12,500	\$255,000	\$0	\$0	\$267,500		\$20,000	\$287,500

*Explain Other (h) as an attachment

*Other is money that comes in unsolicited

EXHIBIT IV: JUF News Advertising Terms & Policies

JUF NEWS

2017 ADVERTISING TERMS & POLICIES

The Jewish United Fund of Metropolitan Chicago appreciates the support of companies and organizations that advertise in *JUF News*, *The Guide to Jewish Living in Chicago* and JUF's other media channels. JUF publications are intended to serve the community and reflect JUF's mission to help people in need, create Jewish experiences, and strengthen community connections.

JUF reserves the right to determine what messaging, in whole or in part, is appropriate for our media and will reject advertisements deemed misleading, inflammatory or otherwise detrimental to JUF's mission.

Please respect the following policies, which have been established by JUF's Resource Development Policy and Marketing & Communications committees:

FUNDRAISING POLICIES

- Given the primacy of JUF's community-based fundraising objectives, advertisements with a fundraising purpose will be evaluated according to JUF's current Resource Development Policy Guidelines. (juf.org/pdf/news/resource_development_policy_guidelines.pdf)
- To reinforce the centrality of the community campaign and minimize overlap, will not accept advertisements from JUF-funded organizations for fundraising events that take place during the JUF Campaign Period (April 2–June 13, 2018). If an agency's event falls within eight weeks after the end of the JUF Campaign period, they may promote their event up to eight weeks before the event date in *JUF News*, even if the advertisement falls during the JUF Campaign period.
- Advertisements that appear outside the JUF Campaign Period may list ticket or meal prices, minimum donation and giving level to attend an event up to \$100. Advertisements may never solicit sponsorships, tickets or meal prices, or giving levels over \$100.
- We do not accept advertisements that solicit limited or unlimited donations.
- Advertisements cannot solicit membership in a giving society/group or include a list of participants and/or their gifts to the organization.

OTHER POLICIES

- Synagogues can list membership rates and High Holiday ticket prices, and day schools can list tuition prices. Other kinds of memberships may not be listed if they exceed \$100 per person annually.

- We only publish matchmaking advertisements from sources that honor requests to limit matches between Jews.
- Food/restaurant advertisements should not mention "traif" (pork, shellfish, etc.).
- We do not accept election-connected political advertisements.
- We will assess advertisements promoting a particular political or ideological position with regard to facts, tone and communal norms. If we accept such an ad, we will clearly identify it as a paid advertisement.
- We reserve the right to place the words "paid advertisement" above an advertisement that appears similar to editorial copy and layout.
- Advertising space may not be donated, transferred or re-sold to third parties.
- Ads placed by clergy that promote services related to Jewish ritual and practice can only be placed by those who are members in good standing with mainstream Jewish clerical organizations (e.g., Chicago Board of Rabbis, Chicago Rabbinical Council, Cantors Assembly and equivalents in other locales).
- Advertisements for JUF agencies and beneficiaries must adhere to JUF brand standards, including the following language: "A partner with the Jewish United Fund in serving our community," as agreed in JUF's Resource Development Policy Guidelines.

TERMS & COMMISSIONS

Advertising Agencies: Recognized agencies that provide camera-ready artwork are allowed commission of 15%. Insertion orders are required.

Not-for-Profit Organizations: 501(c)3 not-for-profit organizations that show proof of nonprofit status can receive a 20% discount on space charges. Not-for-profit organizations do not qualify for additional agency discounts.

Payment: Pre-payment is required for an advertiser's first placement in *JUF News*, after which normal credit procedures may be established. Payment is due within 30 days. *JUF News* reserves the right to cancel future advertising for non-payment on past due accounts. Advertisers will be short-rated for previous placements, and will need to prepay future ads until credit is re-established.

Placement: Ads are accepted and positioned at the discretion of the publisher. The advertiser assumes full responsibility for the content of all advertising space. We will be under no liability for failure, regardless of circumstances, to insert any advertising. Ads or copy that arrives after our published deadlines may not be allowed. This includes all ads and copy that fail to meet policies and standards.



Jewish United Fund
OF METROPOLITAN CHICAGO

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