



## MEMO: RECOMMENDATIONS FOR FY27 GRANTS AND ALLOCATIONS

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## Executive Summary

This memo sets out Federation's FY27 funding recommendations for Grants and Allocations and recommends updates to the Grants Funding Framework.

The Grants and Allocations recommended are designed to rebalance Federation's investments to better reflect the community's current demographics and most pressing needs. The proposed update to the Grants Funding Framework is intended to increase the impact of Grants-based investments while strengthening assessment, oversight, and fiscal management.

Taken together, the recommended FY27 funding levels for Grants and Allocations represent an increase of \$146,044 (5.9%) over FY26 and \$98,680 (3.9%) over FY25, reflecting a measured adjustment within recent historical spending patterns (see Table 8: Grants and Allocations Aggregate Spending FY22-27). This increase follows a prolonged period of flat Allocations funding, during which Organizational and Program Funding remained unchanged for over a decade.

## Grants

Federation recommends that the **overall amount** designated for **Grants in FY27** remain at \$395,000, consistent with the projected FY26 level. Federation further recommends moving from the current automatic accrual model for funding Community Impact Grants to a new Grants Funding Framework grounded in a defined annual Grants budget. The new framework would be structured around three Grant Streams: Community Impact Grants, Powered by Federation Grants, and Vulnerable Sector Scholarships.

## Allocations

Federation recommends increasing **Allocations in FY27** from \$2,094,867 in FY26 to \$2,240,911 in FY27, representing a 5.9% increase.

Federation recommends a 5% increase to **Organizational Funding** for the six core partner organizations, from \$1,864,294 in FY26 to \$1,957,509 in FY27.

Federation recommends a 5% increase to existing **Program Funding** allocations, alongside the introduction of a new \$50,000 funding stream delivered through a two-year Request for Proposals focused on programs serving seniors. Together, these recommendations would increase total Program Funding in FY27 to \$145,655 while re-aligning investments to better reflect areas of growing need.

Federation recommends increasing **Supplementary School** funding in FY27 to \$125,747, reflecting a 5% increase to existing schools and the formal inclusion of a sixth supplementary school.



Lastly, Federation recommends maintaining funding for **Yeshiva High School of Ottawa (YHSO)** at approximately \$12,000 in FY27, subject to adjustment under the established enrollment-based funding formula.

## Background: Who We Fund and How We Fund Them

Federation invests in Ottawa’s Jewish community through **Grants** and **Allocations**.

**Grants** consist of time-limited, purpose-driven funds intended to encourage innovation, lower barriers to engagement, and pilot new programs. Historically, Grants, known as Strategic Funding, have been funded through an automatic accrual model, whereby funds raised above the \$4.7 million annual campaign target flowed into a separate Strategic Funding envelope. The Strategic Priorities Committee determines the total amount of Grants funding available each year. Requests for proposals for Grant Streams are developed by staff in collaboration with the Grants and Evaluation Committee Chair. The review, evaluation, and approval of Grants are overseen by the Grants and Evaluation Committee and funding recommendations are brought to the Board for approval. While this model successfully expanded innovation and engagement, it has become increasingly complex over time and has resulted in an accumulated balance of approximately \$1.1 million that is not being disbursed at a sustainable or strategic pace.

**Allocations** are ongoing, annual investments in core local Jewish institutions that deliver essential services. Allocations provide stability and predictability and are made through three primary Allocations Streams: *Organizational Funding* supports the operating costs of six core Jewish institutions (“the Big Six”). *Program Funding* has supported nine organizations delivering fourteen targeted community engagement programs. *Supplementary School Funding* supports five Hebrew school programs, with funding determined by a formula based on enrollment and instructional contact hours. The Grants and Evaluation Committee meets annually with the core local Jewish institutions (often called “legacy organizations”) that are funded by the Allocations Streams to review compliance, assess current challenges, and recognize impact and successes.

## Grants Recommendations - Detail

Federation recommends that the overall amount designated for **Grants in FY27** remain at \$395,000, which is the amount designated for FY26. The FY26 Grants designated amount represented an increase of 1% from FY25 (see Table 1: Grants FY22-27).

**TABLE 1: GRANTS FY22-27**

	<b>FY22</b>	<b>FY23</b>	<b>FY24</b>	<b>FY25</b>	<b>FY26</b>	<b>FY27</b>
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<b>Amount Designated for Grants</b>	\$165,040	\$169,239	\$303,648	\$391,365	\$395,000 <sup>1</sup>	\$395,000
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Federation further recommends moving the **Grants Funding Framework** from an automatic accrual model to a clearly defined annual Grants budget with three Grant Streams: Community Impact Grants (\$200,000), Powered by Federation Grants (\$120,000), and Vulnerable Sector Scholarships (\$75,000).

### Community Impact Grants

Community Impact Grants are time-limited, theme-based grants to organizations and partnerships for collaborative initiatives aligned with annual strategic priorities, including Jewish Journeys, Security Grants, and the Arts & Culture Grant.

### Powered by Federation Grants

Powered by Federation Grants are low-barrier individual and household engagement grants that reduce financial and social barriers to Jewish life. They include Microgrants and Shabbat Together 613. The Powered by Federation Grants Stream responds directly to the Strategic Plan's identification of rising diversity, geographic dispersion, and under-engagement by lowering financial, social, and geographic barriers to Jewish life. These rapid-cycle grants enable individuals and households to shape Jewish experiences in their own homes and neighborhoods, reflecting the varied ways community members seek to connect today. The Powered by Federation Stream positions Federation as a strategic catalyst rather than as a direct program provider. Federation multiplies Jewish engagement by powering individuals and households to lead their own community-based experiences.

### Vulnerable Sector Scholarships

Vulnerable Sector Scholarships are intended for Camp B'nai Brith and March of the Living to lower existing affordability barriers by providing needs-based scholarships to families for these experiences. They respond to the 2025-2030 Strategic Plan's identification of rising affordability pressures affecting families across the community.

**TABLE 2: FY27 GRANT STREAMS**

<b>Stream</b>	<b>Purpose</b>	<b>Examples</b>	<b>FY27</b>
<b>Community Impact Grants</b>	Time-limited, theme-based grants to organizations for collaborative pilot initiatives aligned with annual strategic priorities	Arts & Culture Grants; Jewish Journeys; Security Enhancement Fund	\$200,000

<sup>1</sup> FY26 Actuals remain preliminary and will be finalized upon completion of year end reporting.



<b>Powered by Federation</b>	Individual and household engagement grants that lower barriers to Jewish engagement	Shabbat Together 613; Microgrants	\$120,000
<b>Vulnerable Sector Scholarships</b>	Need-based financial support to reduce affordability barriers	Camp and program scholarships (e.g., Camp B'nai Brith of Ottawa, March of the Living)	\$75,000
<b>Totals</b>			<b>\$395,000</b>

## The Grants Funding Framework

Federation recommends moving the Grants Funding Framework from the current automatic accrual model – where funds raised above the \$4.7 million Annual Campaign target automatically flow into a Strategic Funding envelope – to a clearly defined annual Grants budget organized around the three Grant Streams. The current accrual holds a balance of approximately \$1.1 million, which will be drawn down intentionally in this Grants Funding Framework.

The recommended update of the framework strengthens governance by improving predictability, clarifying Board oversight, and aligning funding decisions with approved strategic priorities. It improves fiscal management by drawing down accumulated balances deliberately, stabilizing annual budgeting, and ensuring funded adjustments are sustainable within existing surpluses.

## Historical Background: From Strategic Funding to Grants

Strategic Funding, later called “Community Impact Grants” and referred to here simply as “Grants,” was launched in 2019 by the Strategic Funding Task Force. The Task Force had two goals:

1. Shift 15% of total investment from Allocation to Strategic Funding, and
2. a 20% increase in Jewish engagement.

The Funding Framework for Strategic Funding specified that funds raised above a \$4.7 million annual campaign target automatically flowed into a Strategic Funding envelope. Enabled by additional revenue from the 2018 and 2019 Challenge Funds, the model introduced time-limited, non-renewable grants designed to create new on-ramps to Jewish life. While the Strategic Funding envelope also supported select initiatives such as Advocacy and external consultant fees for the preparation of the Strategic Plan, this memo focuses exclusively on the expenditures and outcomes of Community Impact Grants. Going forward, starting in FY27, Federation will use the term “Grants” to refer to the three Grant Streams: Community Impact Grants, Powered by Federation Grants, and Vulnerable Sector Scholarships.



## What Was Achieved: FY20–FY25

Year over year, Strategic Funding/Community Impact Grants grew from 7% of total investment in FY20–FY23 to 12% in FY24 and 15% in FY25.

Type	FY20	FY21	FY22	FY23	FY24	FY25
<b>Allocations</b>	\$2,163,867	\$2,142,167	\$2,155,867	\$2,151,867	\$2,150,367	\$2,145,866
<b>Community Impact Grants</b>	\$164,386	\$172,797	\$165,040	\$169,239	\$303,648	\$391,365
<b>Total Investment</b>	\$2,328,253	\$2,314,964	\$2,320,907	\$2,321,106	\$2,454,015	\$2,537,231
<b>Community Impact Grants as % of Total Investment</b>	7%	7%	7%	7%	12%	15%

Community Impact Grants resulted in 44,062 participations over five years (see Table 3: Grant Stream Participations ). We estimate that these participations are equivalent to a 20% increase in Jewish engagement but note that no precise baseline was originally established in 2019 as a comparative metric.

**TABLE 3: GRANT STREAM PARTICIPATIONS**

Grant Stream	# of Participations	Fiscal Years
<b>Microgrants</b>	40,507	FY20-FY25
<b>Strategic Funding for Supplementary Schools</b>	1882	FY20-FY25
<b>Jewish Journeys</b>	949	FY24-FY26
<b>Jewish Jumpstart</b>	591	FY20-FY21
<b>Tuition Incentive Program</b>	133	FY24-FY26
<b>Total Engagements</b>	<b>44,062</b>	

Beyond these grant streams, Federation has also supported community infrastructure through initiatives such as the Security Enhancement Fund, which covers 30% of eligible costs for organizations applying to the Government of Canada’s Canada Community Security Program (CCSP), with the federal government funding the remaining 70%. Between FY21



and FY25, 16 of 24 applications were approved, though fund utilization was uneven, with notable under-spending in FY23 and FY25 – see Appendix, Table 10.

Over the past five years, the Strategic Funding envelope has successfully enabled Federation to expand engagement while supporting dozens of new initiatives across the community. With this phase complete, we recommend transitioning to a new funding model that aligns with the 2025–2030 Strategic Plan.

## Allocations Recommendations - Detail

To address sustained cost pressures identified in the Strategic Plan, Federation recommends a 5% increase across all Allocation envelopes, including Organizational Funding, Program Funding, and Supplementary Schools. These recommendations follow more than a decade of flat Allocations funding across Organizational and Program envelopes. From FY22 to FY26, the core institutions of Ottawa Jewish life operated through the most sustained inflationary period since the 1970s while Allocations funding envelopes remained flat (see Table 4: Allocations FY22-27). Through a modest, across-the-board adjustment, Federation seeks to address rising staffing and other operational costs as well as increased security and service demands.

The recommended increase to Allocations is a course correction not an expansion. It recognizes the real cost pressures facing our partners and reinforces Federation’s responsibility to help stabilize the core institutions that sustain Jewish life.

**TABLE 4: ALLOCATIONS FY22-27**

Envelopes	FY22	FY23	FY24	FY25	FY26	FY27
<b>Organizational Funding</b>	\$1,864,294	\$1,864,294	\$1,864,294	\$1,864,294	\$1,864,294	\$1,957,509
<b>Program Funding</b>	\$164,100	\$164,100	\$164,100	\$164,100	\$113,100 <sup>2</sup>	\$95,655
<b>Supplementary Schools</b>	\$105,473	\$105,473	\$105,473	\$105,473	\$105,473	\$110,747
<b>YHSO</b>	\$22,000	\$18,000	\$16,500	\$12,000	\$12,000	\$12,000 <sup>3</sup>
<b>Total:</b>	<b>\$2,155,867</b>	<b>\$2,151,867</b>	<b>\$2,150,367</b>	<b>\$2,145,867</b>	<b>\$2,094,867</b>	<b>\$2,175,910</b>

The Grants and Evaluation Committee has been preparing the Board for significant change to Allocations funding – particularly to Organizational Funding and Program Funding –

<sup>2</sup> The decrease in Program Funding from FY25 to FY26 reflects the transfer of Hillel Ottawa’s program funding to a permanent budget line in Department 50. The further decrease from FY26 to FY27 reflects the transfer of Camp B’nai Brith’s program funding to the Vulnerable Sector.

<sup>3</sup> YHSO’s annual funding is determined by a formula that incorporates per student costs and three-year enrollment trends.



since FY23. This preparatory work has included a structured review of historic funding patterns, enhanced compliance and reporting requirements, and the use of expanded data collection to better understand reach and outcomes as well as alignment with Federation’s strategic objectives. These efforts were undertaken to ensure that Allocations funding is equitable, effective, and responsive to changing community needs, and to inform future decision-making with stronger evidence and clearer benchmarks. See [Report to the Board, Program Funding Task Force FY23](#); [Allocations Report to the Board 2024](#); [Allocations Report to the Board 2025](#).

## Organizational Funding

Organizational Funding Allocations support the annual operating budgets of six core institutions of Jewish Ottawa:

1. Hillel Lodge
2. Jewish Family Services
3. The Ottawa Jewish Community School
4. The Soloway Jewish Community Centre
5. Tamir
6. Torah Day School of Ottawa

Organizational Funding has been flat for over a decade. Federation recommends increasing the allocation for each of the organizations by 5%. We provide a historical record of Organizational Funding Allocations from FY22 to FY26 below (see Table 5: Organizational Funding FY22-27) with the recommended amount for FY27 indicated in the final row.

**TABLE 5: ORGANIZATIONAL FUNDING FY22-27**

Fiscal Year	Amount	% YoY Increase
<b>FY22</b>	\$1,864,294	0.00
<b>FY23</b>	\$1,864,294	0.00
<b>FY24</b>	\$1,864,294	0.00
<b>FY25</b>	\$1,864,294	0.00
<b>FY26</b>	\$1,864,294	0.00
<b>FY27 – Recommended</b>	\$1,957,509	5.00

The recommended 5% increase to Organizational Funding reflects a necessary adjustment after more than a decade of flat allocations. Over this period, core partner organizations have faced sustained inflationary pressures, including rising staffing, security, and operating costs, which have significantly strained organizational sustainability. This increase is intended as a course correction rather than an expansion, helping stabilize essential institutions and realign funding with current economic realities while preserving predictability and stewardship.



## Program Funding

As of FY27, Program Funding Allocations will support programs of eight partner organizations:

1. Active Jewish Adults 50+ (AJA 50+)
2. Chabad Student Network
3. Jewish Education Through Torah (JET)
4. The Jewish Youth Library
5. NCSY Ottawa
6. Or Hanesamah
7. Ottawa Torah Centre – Chabad
8. Sephardi Association.

From FY22 to FY25, Program Funding Allocations also supported Hillel Ottawa and from FY22 to FY26, Program Funding Allocations supported Camp B'nai Brith Ottawa (CBB). Hillel Ottawa's funding was moved to a separate budget line (Department 50) within the Federation's budget starting in FY26. CBB's Program Funding Allocation has historically gone toward needs-based scholarships for Ottawa families and will be moved to the recommended Vulnerable Sector Scholarships stream (see Table 2: FY27 Grant Streams) within Grants starting in FY27.

Program Funding for each Program Funded Agency has been flat for over a decade. **Federation recommends increasing the allocation for each of the agencies by 5%.** We provide a historical record of Program Funding Allocations from FY22 to FY26 below (see Table 6: Program Funding by Agency FY22-FY27) with the recommended amount for FY27 indicated in the final row. **In addition to this increase to each of the current agencies, we recommend the addition of a \$50,000 funding stream** based on a two-year Request for Proposals that will serve seniors in our community, engage new participants, and sustain ongoing involvement. This stream will be open both to organizations currently receiving Program Funding and those who currently do not receive Program Funding from Federation.

The injection of this \$50,000 funding stream comes to address the mismatch between where Program Funding has historically been concentrated, and where need is now increasing – particularly among seniors and vulnerable members of the community. Federation's 2025-2030 Strategic Plan identified the need to address this misalignment. A recent internal review by Federation has confirmed that Program Funding has largely focused on children (ages 0–11) and religious programming, while underserving Ottawa's fastest-growing and most at-risk population of seniors.

We recommend bringing the total Program Funding allocation from \$113,100 in FY26 to \$145,655 in FY27. That FY27 figure includes the 5% across-the-board increase as well as the \$50,000 for programs serving seniors. The adjustment represents a targeted



reallocation to better support seniors and vulnerable populations, not an expansion of scope.

**TABLE 6: PROGRAM FUNDING BY AGENCY FY22-FY27**

<b>Program Funded Agency</b>	<b>FY22</b>	<b>FY23</b>	<b>FY24</b>	<b>FY25</b>	<b>FY26</b>	<b>FY27 Recommended</b>
AJA 50+	\$13,000	\$13,000	\$13,000	\$13,000	\$13,000	\$13,650
Camp B'nai Brith	\$22,000	\$22,000	\$22,000	\$22,000	\$22,000	\$0 <sup>4</sup>
Chabad Student Network	\$3,500	\$3,500	\$3,500	\$3,500	\$3,500	\$3,675
Hillel Ottawa	\$51,000	\$51,000	\$51,000	\$51,000	\$0	\$0
JET	\$27,000	\$27,000	\$27,000	\$27,000	\$27,000	\$28,350
Jewish Youth Library	\$7,400	\$7,400	\$7,400	\$7,400	\$7,400	\$7,770
NCSY	\$24,200	\$24,200	\$24,200	\$24,200	\$24,200	\$25,410
Or Hanesamah	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,050
Ottawa Torah Centre	\$13,000	\$13,000	\$13,000	\$13,000	\$13,000	\$13,650
Sephardi Association	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,100
Additional Seniors Stream	0	0	0	0	0	\$50,000
<b>Totals:</b>	<b>\$164,100</b>	<b>\$164,100</b>	<b>\$164,100</b>	<b>\$164,100</b>	<b>\$113,100<sup>5</sup></b>	<b>\$145,655</b>

## Supplementary Schools

Federation recommends an increase to Supplementary School funding that combines a 5% inflationary adjustment with a targeted \$15,000 addition to formally include HaKibbutz as a sixth funded supplementary school. This recommendation responds to demonstrated system-wide growth, including significant enrollment increases, while recognizing HaKibbutz's readiness following a phased development supported through Microgrants and Jewish Journeys funding. Future funding will continue to be governed by the existing

<sup>4</sup> The decrease from FY26 to FY27 reflects the transfer of Camp B'nai Brith's program funding to the recommended Vulnerable Sector Scholarship stream in FY27 Grants.

<sup>5</sup> The decrease in Program Funding from FY25 to FY26 reflects the transfer of Hillel Ottawa's program funding to a permanent Federation budget line in Department 50.



enrollment and contact hours formula, ensuring that growth is sustained responsibly without reducing support for existing schools.

### Sustaining Growth and Formalizing Inclusion

The Supplementary School funding envelope has remained flat since FY16, despite measurable system-wide growth. Over the past two years, enrollment has increased by 29%, including 133 new students engaged through Federation's "A Place for Everyone" Tuition Incentive Program. This represents a significant success for Jewish continuity in Ottawa and reflects the strength of the supplementary school ecosystem Federation has helped sustain.

**TABLE 7: SUPPLEMENTARY SCHOOL TUITION INCENTIVE PROGRAM OUTCOMES (2023-2026)**

Total Number of Students Engaged (Cohorts 1 & 2)	133
Total Students Retained (currently enrolled)	91
Average Retention Rate	68%
Costs by Cohort: Cohort 1 (2023–2025)	\$43,200
Costs by Cohort: Cohort 2 (2024–2026)	\$36,075
Total Cost of Program	\$79,275
Cost per participant	\$596

To build on this demonstrated success and bring an emerging program fully into the supplementary school system, we recommend a \$15,000 annual increase to the funding envelope, beginning in FY27 (in addition to the inflationary adjustment of 5% to the FY26 allocation). This increase is to include HaKibbutz as a sixth funded supplementary school; it does not reduce funding for any existing school.

Since its inception, HaKibbutz has been supported by Federation through a deliberate, scaled approach, initially piloted through Microgrants, followed by a two-year Jewish Journeys grant totaling \$30,000. This investment enabled HaKibbutz to develop operational stability and meet Federation’s eligibility criteria for supplementary schools. Now in its third year, HaKibbutz serves approximately 25 students and provides Jewish education to a Hebrew speaking demographic - a population that has been otherwise underserved.

Given the documented success of the supplementary school system, this \$15,000 increase is intentionally modest. It represents a formal recognition of HaKibbutz’s readiness and unique contribution, rather than an expansion or redistribution of funding. Funding will continue to be formula-driven; thus, no existing school will experience a reduction. This recommendation aligns with the broader allocations approach: supporting growth where it has been demonstrated, reinforcing system stability, and making targeted adjustments that reflect current realities while maintaining responsible stewardship.

In developing these recommendations, the Federation considered increasing the Supplementary School funding envelope to keep pace with the evolving needs of the



community and to strengthen tactical organizational support for participating schools. At this time, careful consideration was given to maintaining current funding levels, recognizing that this envelope is already governed by a formula that integrates both enrollment and contact hours, and resulting in recommendations that remain prudent, sustainable, and appropriately conservative.

## Yeshiva High School of Ottawa

Federation recommends maintaining funding for Yeshiva High School of Ottawa (YHSO) at approximately \$12,000 in FY27, subject to adjustment under the established enrollment-based funding formula.

## Fiscal Prudence: Starting from Strength

In aggregate, including both Grants and Allocations, the FY27 recommendation reflects a modest increase of \$146,044 (approximately 5.9%) over FY26 and \$98,680 (approximately 3.9%) over FY25. As shown below, this level of spending remains consistent with recent historical patterns and represents a measured, sustainable adjustment (see Table 8: Grants and Allocations Aggregate Spending FY22-27). It follows a decade of flat Allocations funding.

**TABLE 8: GRANTS AND ALLOCATIONS AGGREGATE SPENDING FY22-27**

Type	FY22	FY23	FY24	FY25	FY26	FY27
<b>Allocations</b>	\$2,155,867	\$2,151,867	\$2,150,367	\$2,145,867	\$2,094,867	\$2,240,911
<b>Grants</b>	\$165,040	\$169,239	\$303,648	\$391,365	\$395,000	\$395,000
<b>Totals</b>	<b>\$2,320,907</b>	<b>\$2,321,106</b>	<b>\$2,454,015</b>	<b>\$2,537,231</b>	<b>\$2,489,867<sup>6</sup></b>	<b>\$2,635,911</b>

Federation is making this recommendation from a position of clear financial strength based on the following indicators:

- An average annual surplus of approximately \$502,000 over the past four years
- \$7.3 million in reserves, including significant unrestricted funds (see Appendix)
- A stable annual campaign, supported by increasingly diversified revenue

The recommended Grants and Allocations increase is fiscally responsible and sustainable. Federation has generated consistent operating surpluses over the past four years (see Table 9: Federation Net Surplus FY22-25 and Table 11: FY22-25 Jewish Federation of Ottawa Audited Financials).

<sup>6</sup> FY26 Actuals remain preliminary and will be finalized upon completion of year end reporting.



This position of financial strength allows Federation to respond to evolving community needs without compromising long-term financial health. Based on Federation’s historical track record, the recommended increases appear feasible and sustainable. Federation can absorb them without drawing on reserves or increasing pressure on the campaign. In parallel with annual campaign pledges, the Development Department, now supported by the Development Committee, has been actively advancing additional sources of revenue, including sponsorships and more diversified funding streams, further strengthening the resilience and viability of Federation’s revenue base.

**TABLE 9: FEDERATION NET SURPLUS FY22-25**

Year	FY22	FY23	FY24	FY25	4-Year Average
<b>Net Surplus</b>	\$639,847	\$381,167	\$391,080	\$596,111	\$502,051

## Looking Ahead

### Evaluation and Recalibration (FY28)

From FY27 to the end of FY28, Federation will measure and assess the impact of the Grants and Allocations recommendations. This will include tracking outcomes via annual progress reports from the two-year Program Funding RFP for seniors, analyzing how funding is reaching different age groups and vulnerable households, and monitoring enrollment trends and capacity across the supplementary schools. In parallel, Federation will review the financial health of organizational partners to understand the effect of the 5% Allocations increase on these organizations’ stability and sustainability.

The described measures will form the basis for regular reporting and Board review, leaving an evidence trail for decision-making. Based on the data obtained, Federation will determine whether further rebalancing, demographic weighting, or funding adjustments are required. Any future changes will be driven by results, system performance, and continued alignment with the 2025-2030 Strategic Plan to ensure that adjustments are purposeful, accountable, and responsive to evolving community needs.

### Long-Term Alignment (FY29)

By FY29, the Federation will operate with a clearer, more consistent way of making funding decisions. Allocations will consider who lives in our community today, which needs are growing, and how different sectors contribute to a healthy Jewish ecosystem. Funding will be reviewed on multiyear cycles, with agreed upon measures to help assess progress and flag when adjustments are needed. The financial and organizational health of funded partners will help guide the work of the Sector Councils described in the 2025-2030 Strategic Plan and inform granting streams and will be reviewed and reported to the Board as part of the annual reporting cycle in May and June.



## Conclusion

Through these recommendations Federation seeks to stabilize core institutions through modest, overdue increases to Allocations, clarify the role of Grants within the overall funding model, and use time-limited funding more intentionally. The recommendations in this memo directly confront the realities that the Strategic Plan identifies: an aging population, rising vulnerability and affordability pressures, and shifting patterns of engagement. In sum, the recommendations better align funding decisions with demonstrated community needs and integrate Federation's role as catalyst, convener, and connector. This is not a departure from stability, but a deliberate course correction.

Federation is strengthening trust with partners and reaffirming that funding decisions are grounded in real community need. Federation is listening – to data, partners, and the community in its own voices. Federation is evolving how it invests in Jewish Ottawa to better serve what our community is today and what we are becoming.



## Appendix

**TABLE 10: FY21-25 SECURITY ENHANCEMENT FUND ALLOCATED VS. DISTRIBUTED**

Year	Applicants	Successful Applicants <sup>7</sup>	Success Rate	Match Allocated	Match Distributed	Remainder	% Expensed
<b>FY21</b>	3	3	100%	\$59,752	\$16,848	\$42,904	28%
<b>FY22</b>	4	4	100%	\$60,625	\$47,213	\$13,412	78%
<b>FY23</b>	4	1	25%	\$36,524	\$2,284	\$34,240	6%
<b>FY24</b>	5	4	80%	\$46,042	\$34,077	\$11,965	74%
<b>FY25</b>	8	4	50%	\$70,090	\$13,035	\$57,055	19%
<b>Totals</b>	24	16		\$273,033	\$113,457	\$159,576	
<b>5-Year Mean</b>	<b>4.8</b>	<b>3.2</b>	<b>71%</b>	<b>\$54,607</b>	<b>\$22,691</b>	<b>\$31,915</b>	<b>41%</b>

Over five fiscal years (FY21–FY25), \$273,033 was allocated, yet only \$113,457 was expensed. The low expenditure rate (41%) and large undistributed balances suggest that the current model does not consistently meet our community’s security needs. Federation is working closely with the Jewish Security Network, Public Safety Canada, and CIJA to increase access to and deployment of federal funds to support a safe Jewish community in Ottawa.

**TABLE 11: FY22-25 JEWISH FEDERATION OF OTTAWA AUDITED FINANCIALS**

	<b>FY22</b>	<b>FY23</b>	<b>FY24</b>	<b>FY25</b>
<b>Revenue</b>				
Annual Campaign pledges	\$4,796,875	\$4,885,120	\$4,922,203	\$4,879,204
Emergency Campaign for resilience	\$496,318	\$124,244	\$0	\$0
Emergency Campaign for Israel/Supplemental Giving	\$6,550	\$0	\$1,958,032	\$0
Campaign Events	\$26,800	\$179,674	\$251,863	\$259,461
Ottawa Jewish Community Foundation grants	\$501,438	\$513,105	\$671,110	\$711,663
Recoveries	\$306,681	\$390,625	\$430,916	\$504,428
Net investment income	-\$12,383	\$309,899	\$456,012	\$410,664
Donations & Grants	\$1,120,389	\$779,249	\$656,503	\$440,847
Federation Programs	\$292,309	\$282,785	\$244,144	\$248,006

<sup>7</sup> Successful in qualifying for federal grants (SIP or CCSP).



Fundraising and administration	\$42,107	\$115,379	\$47,199	\$33,681
<b>Expenditures</b>				
Campaign Events	\$14,492	\$110,615	\$109,933	\$136,412
Fundraising and administration	\$564,301	\$685,750	\$827,724	\$457,508
<b>Allocations and programs</b>				
Agencies	\$3,244,365	\$3,218,496	\$3,266,168	\$3,379,873
Supplemental giving distributions	\$6,550	\$0	\$0	\$0
Designated distributions	\$931,617	\$681,003	\$429,472	\$122,073
Emergency Campaign distributions	\$357,017	\$124,243	\$1,958,032	\$2,005
Federation programs	\$1,818,895	\$2,378,806	\$2,655,573	\$2,793,972
<b>Net result</b>	<b>\$639,847</b>	<b>\$381,167</b>	<b>\$391,080</b>	<b>\$596,111</b>

**TABLE 12: FY24-25 JEWISH FEDERATION OF OTTAWA RESERVES**

Reserve Type	FY25	FY24
Unrestricted	\$4,323,891	\$3,959,754
Internally restricted	\$2,594,919	\$2,356,525
Invested in capital assets	\$404,630	\$411,050
<b>Total</b>	<b>\$7,323,440</b>	<b>\$6,727,329</b>