

Allocations Planning Committee recommendations for the 2012-2013 allocations cycle

Background:

Following the dramatic economic downturn in the fall of 2008 and the corresponding cut to agency allocations in 2009, the board in consultation with the APC decided to discontinue the process of projecting Level II funds based on the success of the following year's campaign. Instead the APC now makes funding recommendations based on the actual amount available for local allocations in that particular calendar year. Based on the campaign result, funding will either remains status quo, or be increased or decreased. In those years where the amount available for local allocations exceeds the previous year, as in the case of the 2011 allocations year, the APC is able to recommend some much needed increases to our partner agencies and support three strategic priorities identified through the Planning Council.

The Board also made a decision in 2010, to establish an allocations stabilization fund and to set aside a certain amount each year from the funds designated for local distributions. This fund is designed to maintain local funding at the previous year's level during years when the campaign does not reach its target.

As a result of the 2011 campaign result, the Board approved a recommendation in February 2012, that approximately \$90,000 in allocation stabilization funds be added to the amount available for local distribution to maintain our partner agencies at the 2011 level. Although the constituent agencies continue to submit two year funding requests, the attached recommendations only apply to the current year.

2012 – 2013 Allocations Cycle:

In 2010, the APC expressed concern about continuing to fund ongoing programs or choosing to fund new programs without any concrete knowledge of their success in meeting their intended outcomes. The APC recommended that all of our partner agencies be required to implement a program evaluation process to demonstrate that their stated program outcomes had been achieved. These evaluations were to become part of the application process. Federation received funding from the Jewish Community Foundation to hire a program evaluation consultant and work with the agencies to introduce and implement outcomes based program evaluation model. Last September, the majority of agencies participated in a one day training program followed by a series of mini-seminars offered by the consultant. In the months leading up to the submission of their applications, each of the agencies met with the consultant to assist them develop their evaluation plan. In 2013, 50% of the funded programs will be evaluated and the results shared

with the APC. By 2014, all existing programs will have been evaluated and all new applications will be required to have an evaluation plan in place. This initiative has already improved the clarity and quality of 2012 applications and a number of the smaller organizations have clearly benefited from support of the consultant.

The APC also committed to meet with all of the partner agencies prior to the March application deadline. Between November 2011 and February 2012, the APC met with all thirteen partner agencies. Each agency had the opportunity to discuss their opportunities and challenges, their program priorities and their future plans. This process enabled APC members to move through the process more quickly and make more knowledgeable decisions and as they were more familiar with the programs and services they were reviewing.

The APC reviewed 52 proposals totaling \$4,567,123 in requests. Subcommittees were formed by envelope and committee members had the opportunity to delve more deeply into individual applications. One of the outcomes of this review is that concerns have been raised about how some of the organizations arrive at their program budgets. Through this year's deliberations, we have accomplished the following:

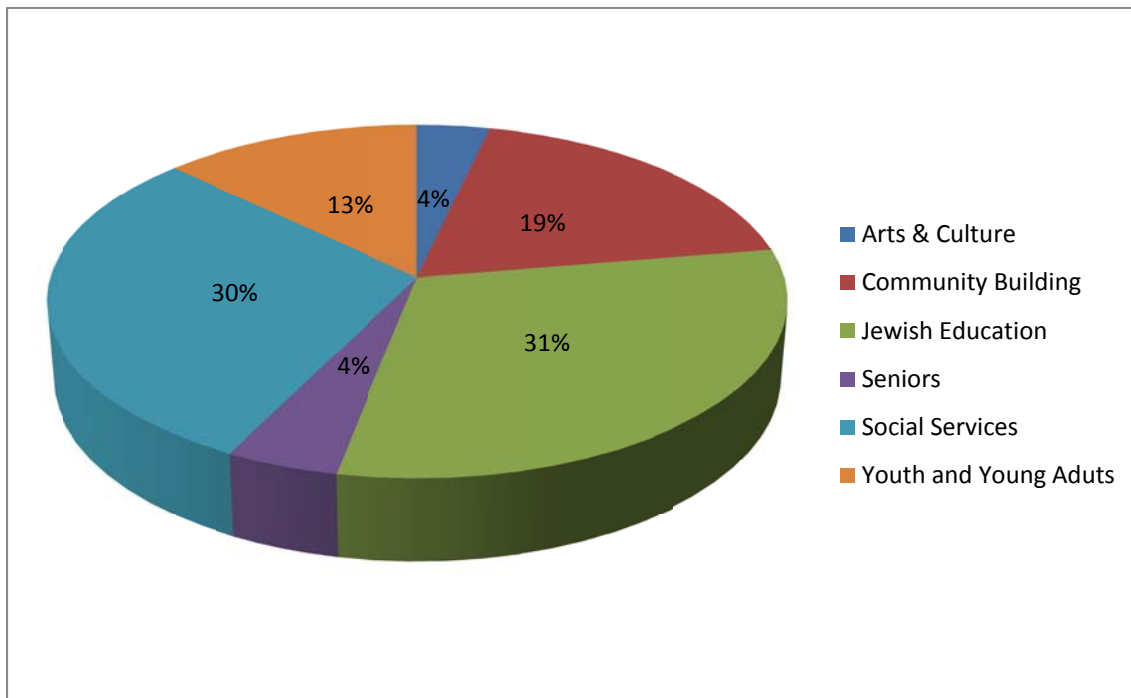
- Increased funding to the regional communities to enable them to continue their important outreach activities
- Funded, for the first time, a new program on the North Shore.
- Determined that Kehila Society of Richmond will no longer be funded for community coordination for which they have not been effective. The Society will be asked to work with Federation staff to develop a transition plan.
- Provided additional funds to the JFSA counseling program to contract for addiction counseling services on an as needed basis rather than fund a new position when no clear need has been identified.
- Transferred funding from the JFSA special needs programs that currently only serves four families to the JCCGV Bagel club who run thriving programs, to develop a support group for parents of children with special needs.
- Increased funding to JFSA's basic resources and the JCCGV's core grant.

Funding by Envelope:

Historically, funding has been allocated through five envelopes: Social Services, Jewish Education and Identity, Community Building, Arts and Culture, and Youth. Based on the 2010 Seniors Report, we added a seniors' envelope to more clearly demonstrate how much is allocated to one of our priority program areas. This year, the APC reviewed the allocations by

envelope and discussed whether they wanted to maintain or change the existing distribution among the six envelopes. After some discussion, the APC agreed that the current balance accurately reflect community priorities. Typically, Social Services and Jewish Education and Identity, receive the largest percentage of the allocation funds, followed by Community Building. Youth and Arts and Culture receive the smallest amounts, although, as the chart below illustrates, there has been some growth in both those envelopes

Envelope	2011	2012	% of total
Arts and Culture	117,500	122,000	3.6%
Community Building	639,000	640,400	19%
Jewish Education	1,082,500	1,067,900	31%
Seniors	150,000	136,250	4.4%
Social Services	960,620	1,025,450	30%
Youth & Young Adult	399,000	438,000	13%



Funding by Agency:

The APC primarily funds individual programs submitted by the constituent agencies. Three organizations (JCCGV, JFGV and JFSA) also receive a core grant to support infrastructure costs

that can't be generated through other funding sources. As indicated by the chart below, almost every agency received an increase in funding this year. Although it appears that Federation did not benefit in the same way, an additional \$20,000 was allocated to support the Yaffa House Society at the request of Federation.

Agency	2011	2012
Burquest Jewish Community	\$16,000	\$18,000
Camperships	\$57,000	\$60,000
Day Schools	\$795,000	\$795,000
Day School Special Needs	\$ 50,000	\$ 54,000
JCCGV	\$549,500	\$564,000
JFGV	\$536,501	\$527,900
JFSA	\$832,250	\$837,950
JHS	\$ 36,000	\$ 36,000
JSA	\$ 17,000	\$ 18,000
Jewish Film Society	\$ 4,000	\$ 5,000
Hillel	\$201,500	\$201,500
Kehila	\$ 48,000	\$ 33,250
Peretz Centre	\$ 16,000	\$ 18,000
North Shore		\$ 18,000
Tikva Housing Society	\$ 56,000	\$ 56,000
Supplementary Schools	\$ 75,000	\$ 75,000
Classroom Assistants		\$ 11,400
Vancouver Holocaust Centre	\$ 14,500	\$ 18,000
White Rock Jewish Community	\$ 16,000	\$ 18,000
Yaffa Housing Society		\$ 20,000
Richmond Hub	\$ 42,000	\$ 42,000
Downtown Outreach	\$ 3,000	\$ 3,000

Going Forward:

As part of our move toward greater accountability for how community funds are allocated, all funded programs will be evaluated over the next two years. Through this process, the APC will be better prepared to decide which programs should continue to receive funding. The APC has also expressed concern about those organizations who continue to submit inflated budget requests

that end up skewing the total amount of funding requests. As the Chair of the APC, I have been asked by the committee to meet with those agencies to discuss our concerns.

The APC is also recommending that Federation create a community task force to look at Jewish education in our community. The Jewish education envelope receives the large percentage of the local distributions and the APC believes that there is a need for a more structured framework to focus funding as is now the case with both youth at risk and seniors programming.

Final Remarks:

I want to take this opportunity to thank the APC members for their hard work and dedication to the community. The APC is a very labour intensive committee and members not only reviewed and commented on over 50 separate applications, they gave up two Sunday mornings to participate in the committee deliberations. I also want to make special mention of two committee members who will be leaving the committee. Risa Levine served four terms on the APC and all of us benefited from her knowledge of the community and her wise counsel; Livia Mahler served three terms and brought to the committee her financial analysis and critical thinking skills. Finally, on behalf of the APC, I would like to extend our gratitude to Shelley Rivkin. She put in a tremendous amount of work interacting with the agencies to ensure that their applications were complete and well drafted, as well as organizing the materials for us and guiding us through the allocations process.

Recommendations:

The attached table represents the APC's recommended level of funding for the listed programs for the 2012/13 allocations cycle. The APC will meet again in May 2013 to determine the local allocations for 2013/14 fiscal year based on the results of the 2012 campaign.