



April 30

**JFC Local Allocations
Process Committee
Member Orientation
FY 2026**



April 10, 2025



Agenda

Time	Topic	Lead
5:30 – 5:45	Welcome and introductions	Jan and Andrea
5:45 - 6	Local Allocations Overview	VPs and Cochairs
6 – 6:30	What's new this year?	Jan
6:30 – 6:45	Q&A	All
6:45 – 6:55	Next Steps <ul style="list-style-type: none">• Site Visit sign ups – Jlive• Review Applications	Jan
7:00	Adjourn	





Local Allocations Leadership & Staff

Name	Position	Role
Don Shuller	Outgoing VP, Local Allocations	Volunteer
Andrea Baron	VP Elect (starting in May)	Volunteer
Jan Shuller	Caring Council Sr. Co-chair	Volunteer
Julie Payton	Caring Council Jr. Co-chair	Volunteer
Julie Glazer	Connecting Council Sr. Co-chair	Volunteer
Jake Hiudt	Connecting Council Jr. Co-chair	Volunteer
Felicia Zakem	Chief Planning & Engagement Officer	Professional
Charles Wright	Director of Community Planning	Professional
Jan Evans	Director of Allocations & Impact	Professional





Welcome Back New & Continuing Members!

Continuing their Service:

- Lainey Docque
- Stacey Edelstein
- Ellen Feld
- Abram Gordon
- Joanne Grossman
- Patti Heldman
- Brian Hertzman
- Jim Jacobson
- Melissa Johnson
- Chuck Kessel
- Debbie Lempert
- Heschel Mangel
- Mark Miller
- Mollie Newman
- April Resnick

- Micah Resnick
- Matt Rosensweet
- Mark Sass
- Perri Schenker
- Marc Weinstein
- Chana Wolfson
- Judy Zipkin
- David Zucker

Returning after time off:

- Richard Behrman
- Rebecca Goldwasser
- Meryl Gruber

NEW to Local Allocations

- Ezra Babcock
- Ariel Bublick

- Janet Callif
- Betty Dannenberg
- Hope Evans
- Sandra Friend
- Barbie Goldstone
- Lois Gushin
- Ifat Lahyani-Curiel
- Brett Leonard
- Jeremy Lifter
- Yarden Neeman
- Rachel Spivak
- Sydney Warm
- Heidi Weissman





What is Local Allocations?

A team of 50+ volunteers ensuring community funds are distributed transparently and effectively to local programs.





“Reader’s Digest” Version of responsibilities:

- Read 7-8 grant applications over the course of the summer (June 16 - August 30)
- Provide evaluation feedback for each using our new online scoring tool
- Sign-up for at least 2 site visits among those 7-8 organizations and provide additional evaluation feedback via our online tool
- Attend 3 virtual Caring or Connecting Council meetings over the summer to discuss the evaluation data and make general funding recommendations





Council Responsibilities

- Steward community dollars with transparency
- Review grant applications and program budgets
- Visit agencies to assess needs and impact
- Evaluate programs using a standardized rubric
- Ask questions and gather insights to inform funding decisions
- Make funding recommendations
- Provide input to help agencies strengthen their programs





Our Goals

- Steward community funds with transparency and accountability
- Increase awareness of local organizations, services, and community needs
- Develop ambassadors for JFC and the broader Jewish community
- Inspire deeper engagement, volunteering, and leadership opportunities
- Encourage philanthropy and sustained community giving





Term Limits for a Council Member

- Two-year minimum commitment
- Members may serve up to six years (three terms) on a council
- Co-chairs serve a two-year term, rotating leadership annually
- Rotating members and co-chairs may join another council immediately
- All co-chairs serve on the Local Allocations Committee during their term (their vote counts!)





Organizations We Support

Applied in 2024 for 2025-26 Funding

- Mayerson JCC (4 programs)
- Jewish Family Service (1 program)
- JVS Career Services (2 programs)
- Cincinnati Hillel
- Hillel of Miami University
- Ohio Jewish Communities
- Holocaust & Humanities Center
- Community Kollel
- Halom House
- UC Department of Judaic Studies
- 12 local Synagogues (Synagogue Excellence in Education Directive or SEED)

Applying in 2025 for 2026-27 Funding

- Mayerson JCC (3 programs)
- Jewish Family Service (2 programs)
- Rockwern Academy
- Cincinnati Hebrew Day School
- Atara Girls High School
- Camp Livingston (3 programs)
- Jewish Cemeteries of Greater Cincy
- Jewish Fertility Foundation
- Chabad Blue Ash
- Camp Ashreinu (2 programs)
- Camp Chabad





What's New for 2025-26?

- **Agency Partnership packet accompanied by a training**

What is it? A comprehensive document detailing all the aspects of the local allocations process and its functions.

Why is it important?

- Reflects our commitment to transparency and inclusivity
- Aligns all stakeholders: Staff, Volunteers and Agencies
- Enables both parties to prepare effectively for each touchpoint
- Facilitates better data collection, leading to improved analysis
- Builds consistency and standardizes the process





What's New for 2025-26?

Agency partnership calls (formerly check-in calls)

Questions used in the calls:

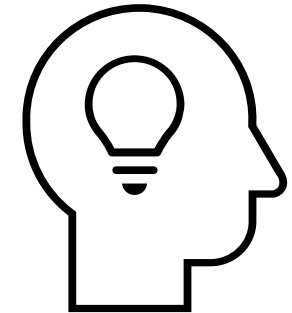
- How's the start of 2025 for your agency?
- What are you looking forward to in 2025?
- What did you learn in 2024?
- Significant achievements, changes, or challenges?
- Any changes in current program or ideas for a new program to apply for?





What's New for 2025-26?

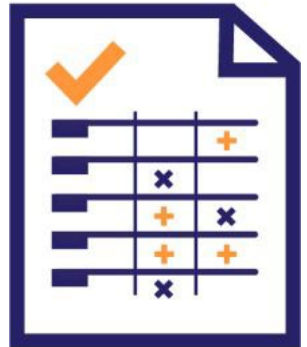
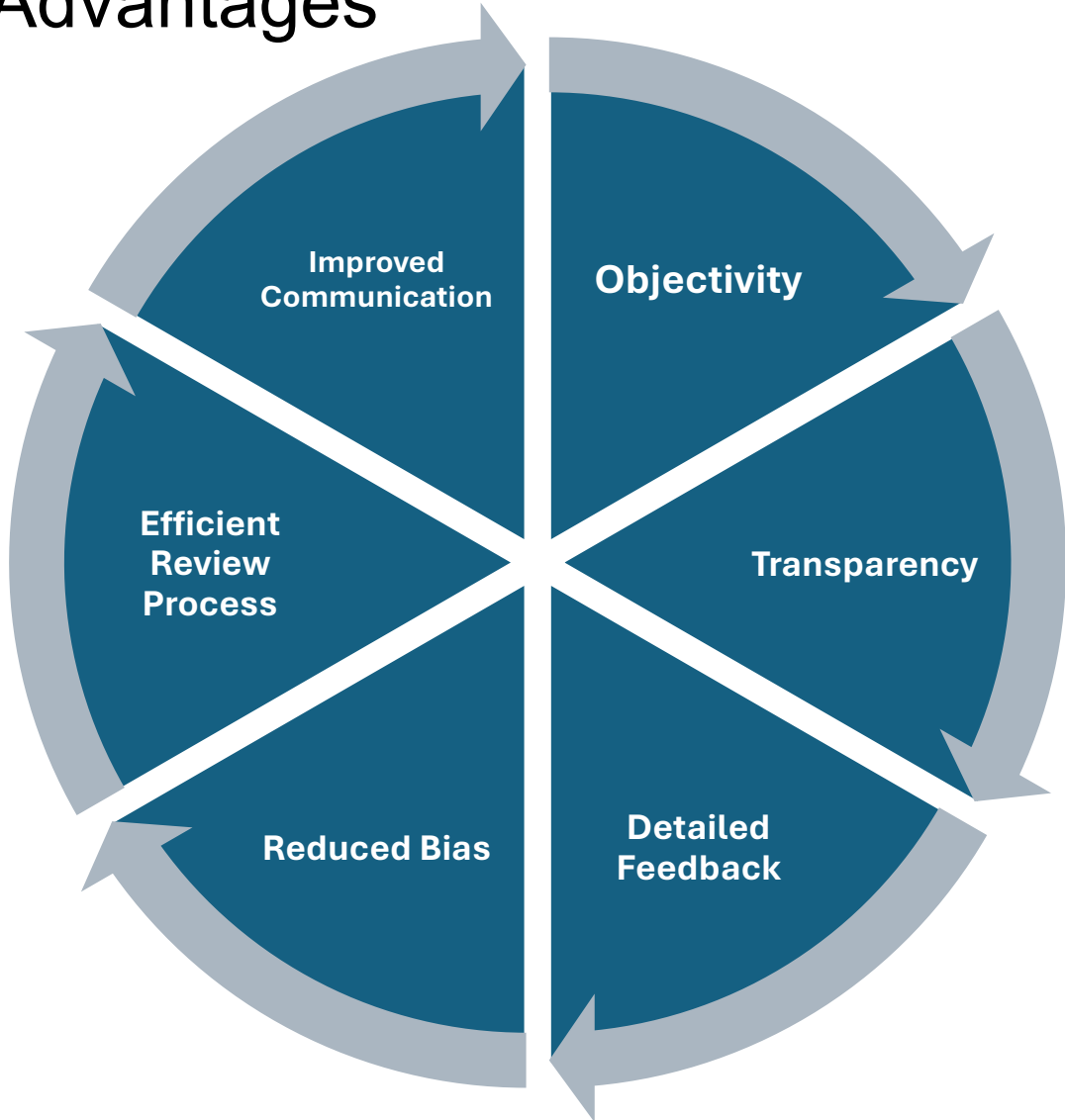
- **Streamlined application featuring new questions that focus on outcomes, results and learning**
 - Key activities and outputs - actions necessary to run the program and the quantifiable outputs of each
 - Expected impact on program participants
 - Last year's program results using your key measurements
 - What have you learned from your results?





What's New This Year?

Rubric – Key Advantages





Agency & program name:

Instructions: Read the program application. Click in the boxes to rate each program using the criteria below. Enter an “M” if the program meets the criterion; enter an “H” if it exceeds the criterion; enter an “L” if it falls short of meeting the criterion. If you entered “H” or “L” for any of the criteria, please state your reason why in the notes section. Please keep the comments concise and specific to the ratings of "H" and "L".

JEWISH FEDERATION OF CINCINNATI APPLICATION RUBRIC		
IMPACT Demonstrating measurable change and improvement in lives High – Medium - Low	ALIGNMENT Aligning activities and the impact of the program with impact areas High – Medium - Low	ACCOUNTABILITY Delivering efficient, effective and quality services as proposed High – Medium - Low
<input type="checkbox"/> Program impact: program demonstrates positive outcomes to clients served	<input type="checkbox"/> Program Description: program goal and purpose clearly identified	<input type="checkbox"/> Program budget: use of funding is detailed and clear
<input type="checkbox"/> Program results: program demonstrates past results.	<input type="checkbox"/> Impact Areas: program clearly articulates alignment to chosen impact area(s)	<input type="checkbox"/> Financial Documents: all financial documentation turned complete and on time
<input type="checkbox"/> Program has learning and insights from delivering services	<input type="checkbox"/> Program impact and key activities are mutually supportive	<input type="checkbox"/> Program communicates any significant changes
<input type="checkbox"/> Partnerships & Collaborations: Any partnerships or collaborations with other organizations that enhance program impact are clearly articulated		
NOTES	NOTES	NOTES



Agency & program name:

Instructions: Read the program application. Click in the boxes to rate each program using the criteria below. Enter an "M" if the program meets the criterion; enter an "H" if it exceeds the criterion; enter an "L" if it falls short of meeting the criterion. If you entered "H" or "L" for any of the criteria, please state your reason why in the notes section. Please keep the comments concise and specific to the ratings of "H" and "L".

JEWISH FEDERATION OF CINCINNATI

SITE VISIT RUBRIC

Staff was able to elaborate and provide additional information beyond the response to the applications' questions

Staff provided appropriate updates on program delivery

Success stories or testimonials were shared

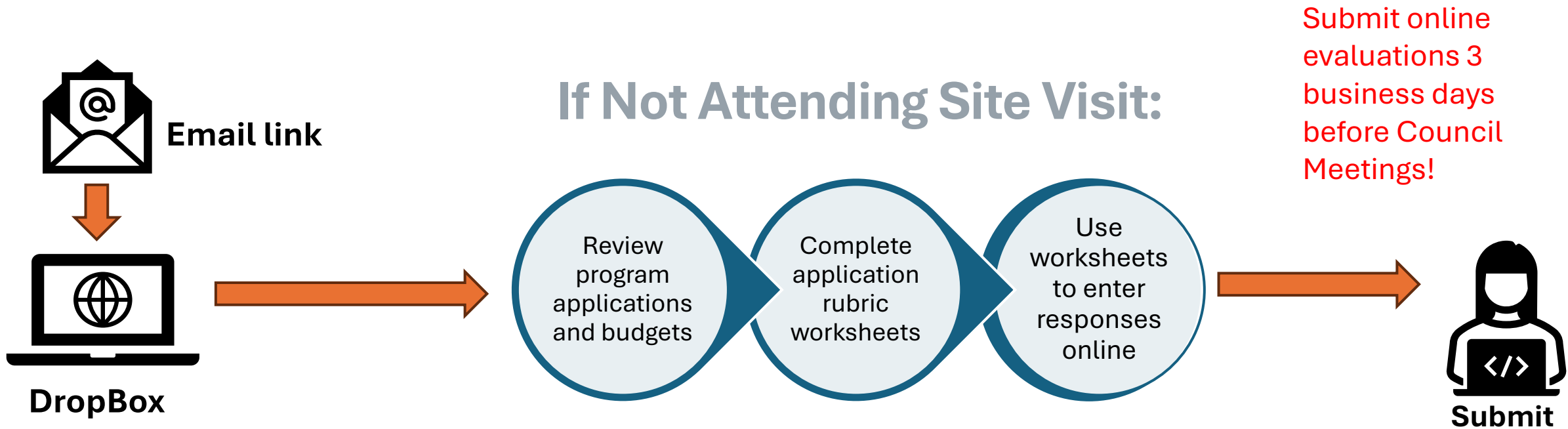
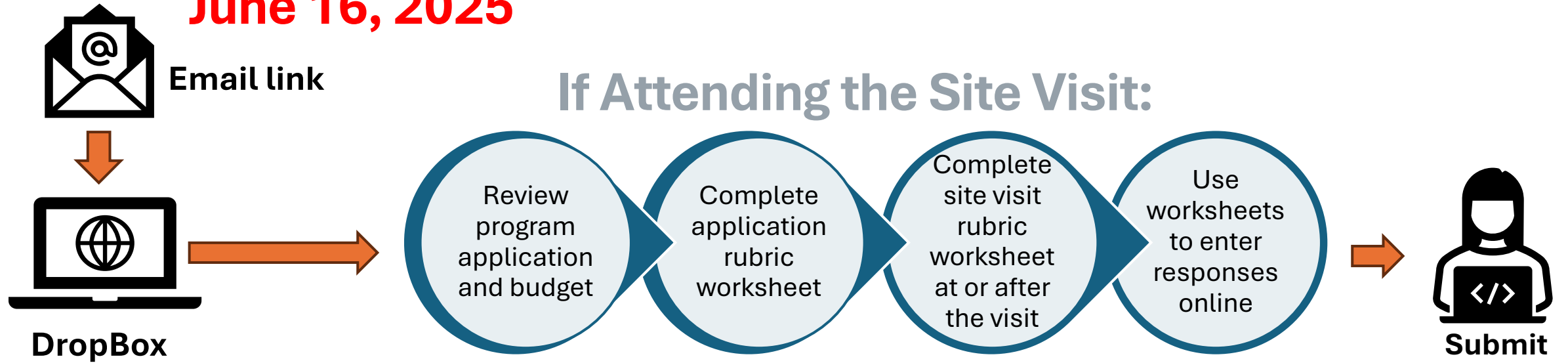
Time was allotted for volunteers to ask questions

The site visit was well organized and well-orchestrated

Agency staff members were well prepared

NOTES:

June 16, 2025



Online Evaluation Rubric

1. Agency & Program Name:

2. IMPACT - Demonstrating measurable change and improvement in lives

	High - Exceeds Criterion	Medium - Program Meets Criterion	Low - Falls Short of Criterion
Program Impact - Program demonstrates positive outcomes to clients served	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program Results - Program demonstrates past results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program has learning and insights from delivering services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Partnerships & Collaborations: Any partnerships or collaborations with other organizations that enhance program impact are clearly articulated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Notes

3. Based on your ratings and comments, what is your overall rating for Impact:

- High - Exceeds Criterion
- Medium - Meets Criterion
- Low - Fall Short of Criterion



Next

Online Evaluation Rubric

1. Agency & Program Name:

2. IMPACT - Demonstrating measurable change and improvement in lives

	High - Exceeds Criterion	Medium - Program Meets Criterion	Low - Falls Short of Criterion
Program Impact - Program demonstrates positive outcomes to clients served	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program Results - Program demonstrates past results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program has learning and insights from delivering services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Partnerships & Collaborations: Any partnerships or collaborations with other organizations that enhance program impact are clearly articulated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Notes

3. Based on your ratings and comments, what is your overall rating for Impact:

- High - Exceeds Criterion
- Medium - Meets Criterion
- Low - Fall Short of Criterion



Next

1. Agency & Program Name:

Camp Ashreinu Scholarships (Connecting)

Mayerson JCC Financial Assistance (Connecting)

Mayerson JCC Camp Scholarships (Connecting)

Camp Ashreinu Scholarships (Connecting)

Camp Ashreinu Night On Us (Connecting)

JFS Youth Mental Health (Caring)

Jewish Cemeteries of Greater Cincinnati Monument Care (Caring)

Program Results - Program demonstrates past results

Online Evaluation Rubric

1. Agency & Program Name:

2. IMPACT - Demonstrating measurable change and improvement in lives

	High - Exceeds Criterion	Medium - Program Meets Criterion	Low - Falls Short of Criterion
Program Impact - Program demonstrates positive outcomes to clients served	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program Results - Program demonstrates past results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program has learning and insights from delivering services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Partnerships & Collaborations: Any partnerships or collaborations with other organizations that enhance program impact are clearly articulated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Notes

3. Based on your ratings and comments, what is your overall rating for Impact:

- High - Exceeds Criterion
- Medium - Meets Criterion
- Low - Fall Short of Criterion

20%

Next



Online Evaluation Rubric

8. Did you attend a site visit for this program?

- Yes, continue to the Site Visit Rubric
- No, submit evaluation



Prev Next

Site Visit Evaluation Rubric

	High - Exceeds the Criterion	Medium - Meets the Criterion	Low - Falls Short of Criterion
Staff was able to elaborate and provide additional information beyond the response to the applications' questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff provided appropriate updates on program delivery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Success stories or testimonials were shared	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time was allotted for volunteers to ask questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The site visit was well organized and well-orchestrated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agency staff members were well prepared	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Notes

10. Based on your ratings and comments, what is your overall rating for the site visit?

- High - Exceeds Criterion
- Medium - Meets the Criterion
- Low - Falls Short of the Criterion

What's New This Year?

Mid grant progress report

(Replaces check-in form)

Questions used in the form:

- Share program results that reflect progress towards outcomes stated in your application.
- Describe anything that has had a significant impact on your program.
- Are you planning to make changes to the program?
- Any concerns about executing the program within your planned budget?





Outcomes Measurement Initiative

"Walking the walk" - we want to reflect our values of curiosity, being supportive, learning more and ultimately, making our community stronger (agencies and people).

- **Year 1 (2025): Assessment Pilot:** Understand agencies' current capacity to deliver outcome measurement.
- **Year 2 (2026): Strengthen Phase:** Help agencies build capacity to measure outcomes and learn from the results.
- **Year 3 (2027): Excel Stage:** Agencies have the knowledge, skills, and processes to measure outcomes that demonstrate meaningful client impact and learn from results.





Local Allocations Timeline Overview

Activity	Date
Applications available to review	June 16
Round 1 site visits	Jun 23 – July 18
Caring Council Meeting 1	July 14
Connecting Council Meeting 1	July 17
Round 2 site visits	July 21 – Aug 8
Caring Council Meeting 2	Aug 11
Connecting Council Meeting 2	Aug 14
Round 3 site visits	Aug 18 – Sep 5
Caring Council Meeting 3	Sep 11
Connecting Council Meeting 3	Sep 8
Year end celebration	Dec 1





Summary of Next Steps:

- Sign up for site visits on JLive (link provided in a follow up email)
- Review applications before site visits and council meetings
- Complete rubrics
- Attend site visits (recommend at least 2)
- Volunteer to present site visit highlights at council meetings if you attended site visit
- To make sure your voice is heard, please be sure to attend all of your Council's meetings





Questions?

Contact Jan Evans
Jaevans@jfedcin.org or 513-985-1528

