

JEWISH UNITED FUND/JEWISH FEDERATION  
OF METROPOLITAN CHICAGO

Resource  
Development  
**Policy Guidelines**  
**2011–2012**



*Revised July 1, 2011*

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Jewish United Fund / Jewish Federation of Metropolitan Chicago  
**Resource Development Policy (RDP) Guidelines**

## **PURPOSE**

Growing local and global Jewish needs require the maximum mobilization and coordination of our communal resources. The community's primary source of raising funds is the Jewish United Fund (JUF) Annual Campaign. While the JUF recognizes the validity of supplemental fundraising events by its beneficiaries or affiliates to address these growing needs, if not properly coordinated, these supplemental efforts could serve to divide the community and drain its human and fiscal resources.

The purpose of these guidelines is to centralize fundraising efforts for our donors and the community, 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 metropolitan Chicago Jewish community. We thank you in advance for your understanding and cooperation. We highly recommend that whenever there is a new Director of Development at your Agency/Day School, that he/she contact the JUF so that we can schedule an orientation to these guidelines. This is meant to facilitate a good working relationship.

No agencies or their affiliates that receive financial support from the Jewish Federation through the Jewish United Fund Campaign (hereafter called "JUF") (see Exhibit I), and no agencies authorized by the National Committee of the Jewish Agency on Control and Authorization of Campaigns (hereafter called the "National Committee") (see Exhibit II), shall 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, without the prior written approval of the JUF/JF Board of Directors or the Committee or Officers thereof to whom authority to provide such approval is delegated. This includes JUF-funded overseas agencies.

For the purpose of this document, "Agency" will hereafter refer to all affiliated, beneficiary and grantee agencies (including Day Schools) of the Jewish Federation of Metropolitan Chicago (hereafter called "Jewish Federation"), as well as all agencies authorized by the National Committee (see Exhibit II).

## **NEW/UPDATED GUIDELINES FOR 2011–2012**

Periodically, the JUF Resource Development Policy (RDP) Committee, as well as the JUF/JF Board of Directors, reviews the JUF RDP Guidelines to make sure they are "current." In accordance with the action taken by the JUF Board of Directors at its December 16, 2010 meeting, the following revisions to the RDP Guidelines were approved, effective July 1, 2011.

We believe that these guidelines will provide increased flexibility to agencies in community approved fundraising while also being clear and consistent with regard to issues of events, event ticket prices and sponsorship. Our goal is to maximize the resources raised by the entire community to address needs.

## Solicitation Clearance

- JUF RDP staff must approve all solicitations above \$500 (formerly \$350).
  - Lists sent for clearance for (individual or corporate) solicitations greater than \$500 should be limited to 300 donors or less.
  - Please allow JUF RDP staff up to 3 weeks to get back to you with approvals.

## Major Event and Sponsorship

- Agencies/day schools may only have one "major" annual event per year. Other events on a parallel level of the major event (e.g., same or higher anticipated revenue) will be discouraged.
- Sponsorship should be limited to one major fundraising/revenue raising event. This includes "event-less" events.
- After an event, an agency/day school must send JUF RDP staff 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 greater than \$500 must first be cleared by JUF RDP staff. Further, this sponsorship cannot be published, advertised, etc. on event materials before the event. At the event, however, there can be a sign/materials listing sponsors (including on screens/videos).
- When seeking sponsors for 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. Instead, levels above \$5,000 should state: "Please call for more information."
  - When listing donors by giving level in a donor recognition piece (e.g., annual report, event program), the agency/day school may list dollars or dollar ranges with giving levels.
- The maximum price of event tickets is now \$500/person (formerly \$350).
- Prior to a major event, the agency or day school should get in touch with appropriate JUF/JF staff regarding remarks for the event that could include such items as the acknowledgement of support from JF/JUF, etc.

## Other

- These guidelines apply to social networking, mobile and other new channels of communication.
- References to the new "JF/JUF Events Database" replace the now defunct "Community Calendar."
- A "Calendar/Deadlines" section has been added to these guidelines.
- The following statement has been added to these guidelines:

***Failure to respect these JUF RDP Guidelines may result in action by the JUF RDP Committee. There will be a review of the outcomes and appropriate recommendations will be made to the Overall Planning and Allocations Committee.***

## DEFINITIONS

**Community Funding Schedule (CFS)**—A 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. This includes results from the previous fiscal year.

The CFS is due each May, so the May 2012 CFS, for example, will include an agency's fundraising plans for July 1, 2012–June 30, 2013, and should include results from fundraising activities from July 1, 2011–June 30, 2012.

The JUF RDP Committee reviews the CFS each Spring, and the CFS then serves as a blueprint for the year ahead. Asking to add an extra mailing, email, snail mail, 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.

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

**Fundraising Activities/Fundraiser**—JUF considers a fundraiser any event or activity (e.g., event, mailing, email, “dinner-less dinner”) where invitees are asked either directly or indirectly for a contribution. This includes events that require a minimum gift to attend (e.g., Thank You event), even if the donor is not solicited at the event or function. Note that **ALL** fundraising activities must be listed in the CFS and must comply with both the rules and spirit of the Guidelines.

**Fundraising Channel**—A method or vehicle for fundraising. Examples include face-to-face, phone, email, letter, event, sponsorship request, social networking site, website, mobile, etc.

**JUF Campaign/“Blackout” Period**—The period of time from April 1\* through Country Club Day (June 20, 2012) during which agencies and their auxiliaries are not to hold any fundraising activities (e.g., solicitation letters and emails, events, save the dates, web postings) because this is JUF’s heavy events season.

- In 2012, the JUF Campaign/“Blackout” Period is Monday, April 2–Wednesday, June 20.
- In 2013, the JUF Campaign/“Blackout” Period is Monday, April 1–Wednesday, June 19.
- In addition, events also may not be scheduled on the dates of the:
  - JUF Advanced & Major Gifts Dinner (typically late October/early November)
  - JUF Vanguard Dinner (typically late October/early November)
  - JUF Women’s Division Lion Luncheon (typically mid-September/October)
- It is understood that JUF may conduct public fundraising activities throughout the year.
- If an agency’s event falls within 8 weeks after the end of the Campaign/Blackout period, they may promote their event up to 8 weeks before the event date, even if this falls during the JUF Campaign/Blackout period.
- Jewish organizations that do not receive financial support from the JUF and are not authorized by the National Committee are urged to cooperate and, in particular, to avoid conflict in their campaign and fundraising event dates with those of JUF during the Campaign/Blackout period.
- Volunteer and professional leadership are urged to explain and support the Jewish United Fund’s need for primacy in scheduling events.

\* Note that if April 1 falls on a weekend (which it does in 2012), the JUF Campaign/Blackout Period begins the Monday following the weekend.

**Open Ask/Open-Ended Solicitation**—A non-specified contribution solicitation (e.g., “I would like to make a contribution of \$ \_\_\_\_\_ to the Annual Campaign”).

Open Asks are not allowed. As a reminder, solicitations greater than \$500 must first be cleared by JUF RDP staff.

**Solicitation**—Contacting an individual or corporation for a contribution through any fundraising channel (e.g., face-to-face, phone, email, letter, event, sponsorship request, social networking site, website, mobile text).

# GUIDELINES

## BUDGET SUBMISSION/COMMUNITY FUNDING SCHEDULE (CFS)

- Each agency and its auxiliaries shall submit, on appropriate Jewish Federation forms (i.e., the "Community Funding Schedule"), a plan for raising supplemental funds during the upcoming year.
  - The fundraising schedule needs to include the proposed date for each fundraiser and both the gross and net dollar amount of funds to be raised through each fundraising activity. It should also include the gross and net for each fundraiser from the prior fiscal year.
- These submissions are then reviewed/approved by JUF's RDP Committee, prior to approval by the Board of Directors.
- JUF RDP staff will notify the agency what the outcome of the overall review process is.
- If the submission is approved, fundraising activities can only be changed by submitting a request for review by the JUF RDP Committee.

The JUF RDP Committee reviews the CFS each Spring, and the CFS then serves as a blueprint for the year ahead. Asking to add an extra mailing, email, snail mail, 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. See Exhibit III for a sample Community Funding Schedule.

## FUNDRAISING CHANNELS

### General Event Information

- The written approval of the JUF Campaign 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 the JUF RDP Committee **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 Country Club Day of each year and April 1 of the following year (unless April 1 were to fall on a weekend, in which case the period would begin with the Monday following the weekend).
  - **In 2012–2013, these dates are Thursday, June 21, 2012–Sunday, March 31, 2013.**
  - **Fundraising events may NOT be held during the JUF Campaign/Blackout Period (Monday, April 2, 2012–Wednesday, June 20, 2012).**
  - In addition, events also may not be scheduled on the dates of the:
    - **JUF Advanced & Major Gifts Dinner** (typically late October/early November)
    - **JUF Vanguard Dinner** (typically late October/early November)
    - **JUF Women's Division Lion Luncheon** (typically mid-September/October)
    - It is understood that JUF may conduct public fundraising activities throughout the year.
  - See the Calendar/Deadlines section for other important JUF reserved dates.

- Other events on a parallel level of the major event (e.g. same or higher anticipated revenue) will be discouraged.
- 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 greater than \$500 must first be cleared by JUF RDP staff.
- 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, visit **[www.juf.org/EventsDatabase](http://www.juf.org/EventsDatabase)**.
  - To place and/or make changes to your organization’s event, visit **[www.juf.org/EventsDatabase](http://www.juf.org/EventsDatabase)**.
  - If you need assistance and/or access to the Events Database, please email [EventsDatabase@juf.org](mailto:EventsDatabase@juf.org).
- In the interest of cooperation, names of all individuals and corporations, foundations, etc to be solicited for more than \$500, including those solicited through the agency and day school endowment programs, must be cleared in advance with the JUF RDP staff.
  - When submitting your list of names, please include the donors’ addresses, 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).
  - Sponsorship is limited to one major fundraising/revenue raising event. This includes “event-less” events.
  - After an event, an agency/day school must send JUF RDP staff a list of sponsors and the amount of their sponsorship.
- Prior to a major event, the agency or day school should be in touch with appropriate JUF/JF staff regarding remarks for the event that would include items such as acknowledgement of support from JF/JUF, etc.

## Invitations

- All invitations, whether printed or electronic, that relate to fundraising activities are to be submitted to the JUF RDP staff for approval prior to printing, posting and distribution.
- The published cost of an event is not to exceed \$500 per person.
- Invitations and response cards—whether printed or electronic—cannot include statements asking for an open-ended contribution. (See “Open Ask” under Definitions.)
- Event materials may request contributions up to, but not to exceed \$500.
- 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)
- If an agency’s event falls within 8 weeks after the end of the JUF Campaign/Blackout period, they may promote their event up to 8 weeks before the event date, even if this falls during the JUF Campaign/Blackout period.
- All invitations, whether printed or electronic, are required to include the following language: *A partner in serving our community, supported by the Jewish United Fund/Jewish Federation.*

## Event Sponsorships/Levels

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

## **Event Sponsorships/Levels, *cont'd***

- Sponsorship should be limited to one major fundraising/revenue raising event. This includes “event-less” events.
- After an event, an agency/day school must send JUF RDP staff 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 greater than \$500 must first be cleared by JUF RDP staff. Further, this sponsorship cannot be published, advertised, etc. on event materials before the event. At the event, however, there can be a sign/materials listing sponsors.
- When seeking sponsors for levels above \$5,000 (including levels that include pages in ad books, event tickets, raffle ticket, or any other item included with sponsorship), it is okay to list the NAMES of those levels, but NOT the dollar amounts. Instead, levels above \$5,000 should state: “Please call for more information.”
- When listing donors by giving level in a donor recognition piece (e.g., annual report, event program), the agency/day school may list dollars or dollar ranges with giving levels.

## **Ad Books**

- Ad book solicitations are permitted for amounts not to exceed \$750 per person or firm.
- Ad book solicitations need to comply with the guidelines and are not to be conducted during the JUF Campaign/Blackout Period (April 1–June 20, 2012).
- Ad blanks are to be submitted to JUF RDP staff for approval prior to printing and distribution.

## **Raffle Tickets**

- All raffle tickets are to be submitted to JUF RDP staff for approval prior to printing and distribution.

## **Letters of Solicitation**

- All letters of solicitation are to be submitted to JUF RDP staff 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 staff and should be limited to 300 donors or less. When submitting your list of names, please include the donors’ addresses, 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 staff up to 3 weeks to get back to you with approvals.
- Letters of solicitation cannot include statements asking for an open-ended contribution. (See “Open Ask” under Definitions.)
- 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)
- All agencies and their auxiliaries are required to have letters of solicitation include the following language: *A partner in serving our community, supported by the Jewish United Fund/Jewish Federation.*

## **Letterhead**

- All agencies and their auxiliaries are required to include the following language on their letterhead: *A partner in serving our community, supported by the Jewish United Fund/Jewish Federation.*

## Websites

With the increased use of the internet for fundraising and institutional communication purposes, it is important to keep in mind that 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 staff for approval prior 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.
- If an agency's event falls within 8 weeks after the end of the JUF Campaign/Blackout period, they may promote their event up to 8 weeks before the event date, even if this falls during the JUF Campaign/Blackout period.
- Websites cannot be used to conduct open-ended solicitation of gifts. (See "Open Ask" under Definitions.)
- Websites may request contributions up to, but not exceeding \$500.
- 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)
- Website communications must include the following language: *A partner in serving our community, supported by the Jewish United Fund/Jewish Federation.*
- Websites should also include the JUF logo and a link to the JUF website ([www.juf.org](http://www.juf.org)).

## Annual Memberships

- Agencies and their auxiliaries may solicit annual memberships for fundraising purposes, at a level not to exceed \$100 per person.
- Once an agency or its auxiliary has received approval for this, it is not necessary to seek approval each year.
- New memberships should not be solicited during the JUF Campaign/Blackout period (April 2 - June 20, 2012).

## Life Memberships

- Agencies and their auxiliaries may solicit life memberships for fundraising purposes, not exceeding \$1,000 per person.
- Life memberships may not be solicited during the JUF Campaign/Blackout period (April 2–June 20, 2012).

## Annual Reports

- All agencies and their auxiliaries that produce annual reports will be required to include the following language: *A partner in serving our community, supported by the Jewish United Fund/Jewish Federation.*
- When listing donors by giving level in a donor recognition piece (e.g., annual report, event program), the agency/day school may list dollars or dollar ranges with giving levels.
  - Note that if an agency is seeking sponsors for levels above \$5,000 (including levels that include pages in ad books, event tickets, raffle ticket, or any other item included with sponsorship), it is okay to list the NAMES of those levels, but NOT the dollar amounts. Instead, levels above \$5,000 should state: "Please call for more information."

## Newsletters

- All agencies and their auxiliaries are required to include the following language in their newsletters, whether printed or electronic: *A partner in serving our community, supported by the Jewish United Fund/Jewish Federation.*
- Any solicitations included in newsletters are to be included in each agency or auxiliary's plan for supplemental fundraising (see "Community Funding Schedule" in Definitions), and such solicitations are required to comply with the aforementioned guidelines.

## Other

Any/all other forms of fundraising (e.g., face-to-face, phone, snail mail, email, social networking, mobile/text/SMS) are subject to the aforementioned guidelines. Any questions should be directed to JUF RDP staff.

## JUF EVENTS DATABASE

The "Community Calendar" is now automated and is referred to as the "Events Database." There is an online tutorial that explains, step by step, how to use the Events Database. If you need assistance and/or access to the Events Database, please email [EventsDatabase@juf.org](mailto:EventsDatabase@juf.org).

- 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.
- YOU are responsible for submitting, editing, maintaining, and deleting your event on-line. No other form of communication with JUF (phone, email, letter, etc.) will place your program on the Events Database.
- Communal tradition and etiquette is to respect other groups' prior plans. While we urge collegial cooperation, we will not serve as a mediator between groups. It is up to each group to resolve conflicts between themselves and to submit changes (including the removal of tentatively held dates) to the Events Database.
- Not all events on the same day are conflicts. Not all programs in the Events Database belong on the totally public JUF website (<http://www.juf.org/calendar/default.aspx>) or in the *JUF News*. Similarly, some events (e.g., recurring classes) that might belong in those public domains do not belong in the Events Database, which is a tool exclusively for event planners.
- JUF is authorized to make changes to the Events Database, including the removal of tentative or even confirmed dates. JUF offers this Database as a service to the community and will not be held responsible for errors, omissions, scheduling conflicts, etc.

## CAPITAL FUNDRAISING, ENDOWMENTS & GRANTS

### Capital Fundraising

- Any agency that receives funding from the Jewish Federation must have its capital fundraising plans approved under the Jewish United Fund/Jewish Federation Centennial/Continuum assessment process.

### Agency Endowment

Below are the uniform language guidelines for agency endowment invitations, annual reports and program publications, whether such materials are printed or electronic.

***Invitations:***

The \_\_\_\_\_ Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Agency Endowment Program.

***Annual Reports:***

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 the community needs. All commitments to Agency Endowment Foundations are recognized as gifts to the Jewish Federation's Centennial Campaign.

***Agency Endowment Events 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 Agency Endowment Foundation are recognized as gifts to the Jewish Federation's Centennial Campaign. For more information, please call the Legacies & Endowments Department at 312-357-4853.

**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.

***Invitations:***

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

***Annual Reports:***

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 the community needs. All commitments to the Day School Endowment 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 Day School Endowment Foundation are recognized as gifts to the Jewish Federation's Centennial Campaign. For more information, please call the Legacies & Endowments Department at 312-357-4853.

**Grants**

- Federation agencies are required to inform the JUF Resource Development & Community Planning Team (previously JUF Grants Department) of all proposals to private foundations, corporations and/or government entities before the application is submitted.
- There are a number of Foundations—such as the Polk Bros. Foundation, Crown Family Foundation, Michael Reese Health Trust, Circle of Service and others—that have special processes in place and/or require that agency proposals be submitted through the Federation.

## **Grants, cont'd**

- For submissions to ALL foundations and to corporations, it is critical that we coordinate to ensure that contributions to the JUF Campaign, JUF Corporate Partners and the system as a whole are maximized.
- Federation staff has relationships with many foundation officers and donors. We must be prepared to field inquiries from them about agency submissions and advocate on your behalf. We also may be able to offer advice on how to most successfully approach a particular funder.
- 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 your application and possibly gathering intelligence about RFPs.

## **JUF NEWS ADVERTISEMENTS**

- Advertisements with a fundraising purpose will be evaluated in reference to the standard campaign guidelines.
- Fundraising ads from agencies and their auxiliaries for approved events may not appear during the JUF Campaign/Blackout period (April 2–June 20, 2012), except for ads that promote events that take place outside of that time period.
  - Jewish organizations that do not receive financial support from the JUF and are not authorized by the National Committee are urged to cooperate, and, in particular, to avoid conflict in their campaign and fundraising event dates with those of JUF during this time period (April 2–June 20, 2012).
- In advertisements that appear outside the JUF Campaign/Blackout Period, membership fees may be requested by an amount up to \$100 per person annually. Ads cannot request one to join a giving society/group and may not include a list of participants and/or their gifts to the organization.
- Ads may not request contributions, fees or pledges for organizations other than JUF. These ads cannot include unspecified donation amounts or suggest any method of payment. We will not accept ads for non-JUF fundraising events that include a covert that is interpreted by JUF Staff to be a solicitation or fundraising.
- *JUF News* will not accept ads, in whole or in part, which are deemed to discourage giving to the campaign, including ones which are directly or indirectly disparaging of the campaign itself or any or all of the recipients of funds allocated from the campaign.
- All agencies and their auxiliaries are required to include the following language in their advertisements: *A partner in serving our community, supported by the Jewish United Fund/Jewish Federation.*

## CALENDAR/DEADLINES

- April 2–June 20, 2012: JUF Campaign/Blackout Period
- April 2012: 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 Planning & Allocations Department.
- May/June: Israel Solidarity Day
- July 1: Annual Report Grant Listing
- September: Jewish Federation Annual Meeting
- September/October: JUF Women's Division Lion of Judah Luncheon
- October/November: JUF's Advanced and Major Gifts Dinner and JUF's Vanguard Dinner
- April 1–June 19, 2013: JUF Campaign/Blackout Period
- **In general: Please allow JUF RDP staff up to 3 weeks to get back to you with approvals for solicitations greater than \$500.**

## **EXHIBIT I: Affiliates/Beneficiaries/Grantees that receive support from the Jewish United Fund/Jewish Federation for local social welfare, medical services, culture, education and community relations**

### **HEALTH & HUMAN SERVICES**

#### **CJE SeniorLife**

Lieberman Center for Health and Rehabilitation, The Harry and Jeanette Weinberg Community for Senior Living, Joseph L. and Emily K. Gidwitz Place for Assisted Living, Berman and Hannah Friend Center for Early Alzheimer's Care, Robineau Residence, Helen and Norman Asher Day Services Program, Levy House, Jarvis House, Farwell House, Krasnow Residence, Swartzberg House, Village Center

#### **Dina & Eli Field EZRA MultiService Center and the JUF Uptown Cafe**

#### **HIAS-Chicago**

#### **Jewish Child and Family Services**

Chicago City (Downtown) Community Counseling Center, Chicago City (North) Community Counseling Center, Elaine Kersten Children's Center, Glick Center for Early Childhood Services including Virginia Frank Child Development Center, JCFS Therapeutic Day School and Yeshiva at the Joy F. Knapp Children's Center, Joy F. Knapp Children's Center, North Suburban Community Counseling Center, Northwest Suburban Community Counseling Center, Roger S. Bloch Child & Family Counseling Center (Skokie), South Suburban Community Counseling Center, West Suburban Community Counseling Center, Irene H. Cummings Group Home, Joan Perlman Rosenberg Group Home, John Pugh and Matilda Price Group Home, Migdal Oaz, Holocaust Community Services, JCARES, Jewish Healing Network

#### **Jewish Community Council of West Rogers Park**

#### **Jewish Vocational Service**

JVS Employment Center, West Suburban Office, Northwest Suburban Office, Career Planning Center (Northbrook), Duman Microenterprise Center and Loan Fund

#### **Maot Chitim**

#### **Mount Sinai Hospital Medical Center**

Samuel A. Goldsmith Dispensary, Sinai Medical Group Touhy Satellite

#### **Response**

#### **SHALVA**

#### **South Suburban Community Services**

#### **Task Force on Services for People with Disabilities**

JCFS Family Bridges, Socialization Services (JCC & Keshet), Center for Enriched Living, Eva Cooper Disabilities Program and Legal Advocacy Services (JCFS)

#### **The ARK**

Seymour H. Persky Building

### **SPECIAL GRANTS**

#### **Aliyah Council of Greater Chicago**

#### **Center for Jewish Community Studies**

#### **Chicago Center for Jewish Genetic Disorders**

#### **Government Affairs Offices**

Springfield, Illinois and Washington, DC

#### **JUF/JF Chicago Israel Office**

#### **JUF-TOV Volunteer Network**

#### **Northwest Suburban Service Project**

#### **Shalom Baby/Shalom Chicago**

#### **Shalom Hartman Institute**

### **COMMUNITY BUILDING, JEWISH EDUCATION AND CULTURE**

#### **Associated Talmud Torahs (ATT)**

Serving Synagogue, Community and Day Schools, including scholarships to students at: Akiba-Schechter, Arie Crown, Joan Dachs Bais Yaakov Elementary School-Yeshivas Tiferes Tzvi, Seymour J. Abrams Cheder Lubavitch Day School, Hillel Torah North Suburban Day School, Lubavitch Girls High School, Yeshiva Ohr Boruch-The Veitzner Cheder, Ida Crown Jewish Academy, P'tach Program, Hanna Sacks Bais Yaakov Girls High School, Bais Yaakov Girl's High School, Consolidated Hebrew High School, Elan Educational and Diagnostic Centers, Frankel Teacher Resource Center, Rebecca Esformes Lafer and Rachel Esformes Day School Based Education Program

#### **Community Foundation for Jewish Education**

Serving Synagogue, Community and Day Schools, including Early Childhood Centers, scholarships to students at Akiba-Schechter, the Solomon Schechter Day Schools, Chicagoland Jewish High School; Dawn Schuman Institute, and Chicago Jewish Day School

#### **Special Grant Bernard Zell Anshe Emet Day School**

#### **Ariella Joy Frankel Keshet Day School and Keshet Sunday School Programs for Disabled Youth (supervised by ATT & CFJE)**

#### **Jewish Federation Camp Coupons Program**

#### **Jewish Community Center of Chicago**

Jacob Duman JCC at Woodland Commons, Florence G. Heller JCC, Bernard Horwich JCC, Hyde Park JCC, Lake County Jewish Community Campus, Mayer Kaplan JCC, Bernard Weinger JCC, Anita M. Stone Community Center

#### **JCC Camps and Vacation**

Apachi Chicago Day Camp, Apachi Chicago Day Camp at Weinger JCC, Elaine Frank Apachi Day Camp, JCC Play Villages, "Z" Frank Apachi Day Camp, Camp Chi Perlstein Resort and Conference Center

#### **JCC Community-Wide Programs and Services**

Maccabi JCC, Pritzker Center for Jewish Education, Sidney N. Shure Kehilla Program, Marvin N. Stone Centre for Jewish Arts & Letters

#### **The Hillels of Illinois**

Mildred and William Levine Hillel Center at the University of Illinois at Chicago

Margie K. and Louis N. Cohen Center for Jewish Life, University of Illinois at Urbana-Champaign

Illinois State University

Northern Illinois University

Western Illinois University

Southern Illinois University, Carbondale

Louis & Saerree Fiedler Hillel Center at Northwestern University

Johanna & Herman H. Newberger Hillel Center at the University of Chicago

John Marshall Law School

Rosalind Franklin University of Medicine & Science

Bradley University

Knox College

Lake Forest College

Chicago Kent School of Law

Harriet & Maurice L. Lewis Family

Summer Intern Programs in Jewish Communal Service

Illinois Wesleyan University

Hillels Around Chicago:

Multi-Campus Center—Columbia

College, DePaul University, Illinois

Institute of Technology, North-

eastern Illinois University, Oakton

Community College, Roosevelt

University, Russian Hillel, School

of the Art Institute

#### **Hebrew Theological College**

#### **Spertus Institute of Jewish Studies**

#### **Telshe Yeshiva**

#### **Illinois Holocaust Museum and Education Center**

#### **Synagogue-Federation Commission**

#### **Congregational Enrichment Initiative Program**

#### **Israel Scholarship Programs**

#### **Israel Experience Savings Programs**

Send-A-Kid-To-Israel Partnership

(SKIP)

Bar/Bat Mitzvah-Gift of Israel

JUF Bar/Bat Mitzvah Israel

Experience Certificate

Walk with Israel Voucher

#### **JUF/JF Teen Programming**

Camp TOV

TOV Monthly Teen Volunteering (MTV)

Voices: The Chicago Jewish

Teen Foundation

Write On For Israel

#### **Chicago Board of Rabbis**

#### **Jewish Residential Camp**

#### **Scholarships**

Agudah Midwest, Chi, Ramah,

Moshava, B'nai B'rith Beber, Olin-

Sang Ruby Union Institute, Habonim

Camp Tavor, Young Judaea, Yeshivas

Hakayitz Ma'arava, Negeela Midwest

#### **OTZMA—Israel Leadership**

#### **Program for Young Adults**

#### **JUF Birthright Israel**

#### **JCRC/Hillel Israel Initiative**

#### **on Illinois Campuses**

#### **JUF Right Start**

#### **PJ Library**

#### **Shorashim**

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

#### **Jewish Federations of North America (JFNA)**

#### **Alliance/Joint Budgeting Council**

National Conference on Soviet Jewry

Jewish Council for Public Affairs

Hillel: The Foundation for Jewish

Campus Life

National Foundation for

Jewish Culture

Jewish Education Service of

North America

Hebrew Immigrant Aid Society

(HIAS)

Jewish Telegraphic Agency

Jewish Community Centers

Association

Association of Jewish Family and

Children's Agencies

#### **Jewish Community Relations**

#### **Council of the JUF**

#### **American Jewish World Service**

#### **America-Israel Chamber of Commerce**

#### **Interns for Peace**

#### **Jewish Labor Committee**

#### **Jewish War Veterans**

#### **National Jewish Center for**

#### **Learning and Leadership (CLAL)**

#### **National Jewish Coalition**

#### **for Literacy**

#### **America-Israel Cultural Foundation**

#### **Hebrew Union College**

#### **Yeshiva University**

#### **Jewish Theological Seminary**

#### **Reconstructionist Rabbinical College**

### **OVERSEAS RESCUE, RELIEF AND RESETTLEMENT**

#### **Jewish Federations of North**

#### **America (JFNA)**

#### **The Jewish Agency for Israel**

Immigration and Absorption

Youth Aliyah

Jewish Zionist Education

Renewal and Development, including

Partnership 2000

JUF Grants to the Movements:

Progressive, Masorti and

Modern Orthodox

#### **American Jewish Joint**

#### **Distribution Committee**

Health, social welfare and education

for Israel's disadvantaged and new

immigrants; improving services for

Israel's aged and disabled

Relief, rescue, reconstruction and

education for Jews in some 70

other countries

#### **Operation Promise: hunger in the**

#### **FSU and Ethiopian integration in**

#### **Israel**

#### **Chicago Kiev Kehilla Project**

#### **World ORT—International Program**

#### **Israel Emergency Campaign**

#### **Jerusalem Center for Jewish-**

#### **Christian Relations**

#### **Jewish People Policy**

#### **Planning Institute**

**EXHIBIT II: Agencies Authorized by the National Committee of the Jewish Agency on Control and Authorization of Campaigns**

American Committee for Shaare Zedek Hospital  
 American Friends of Beth Hatfutsoth  
 American Friends of Boystown Jerusalem

American Red Magen David for Israel  
 Federation Council of Israel Institutions  
 Jewish National Fund National Committee for Labor Israel

**EXHIBIT III: Sample Community Funding Schedule (CFS)**

**Community Funding Schedule**

**Agency:**

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
1 Description of Event						<b>Sub Total</b>	<b>Bequests</b>	<b>Other</b>	<b>TOTAL</b>
2 Sponsoring Unit									
3 Date of Event									
4 Charge Range									
5 Number of Persons									
6 Additional Income (1)									
7 Description of Additional Income Source (1) including x units at x \$									
8 Additional Income (2)									
7 Description of Additional Income Source (2) including x units at x \$									
<b>Budget Request FYE</b>	<b>30-Jun-12</b>								
6 Revenue									
7 Direct Expenses									
8 Net Income									
9 Description of Event						<b>Sub Total</b>	<b>Bequests</b>	<b>Other</b>	<b>TOTAL</b>
10 Sponsoring Unit									
11 Date of Event									
12 Charge Range									
13 Number of Persons									
<b>Budget Request FYE</b>	<b>30-Jun-11</b>								
23 Revenue									
24 Direct Expenses									
25 Net Income									



Jewish United Fund  
Ben Gurion Way  
30 South Wells Street  
Chicago, Illinois 60606-5056  
(312) 346-6700

***JUF RDP Questions?***

Contact 312-444-2834 or 312-357-4827

***Events Database Questions?***

Email: [EventsDatabase@juf.org](mailto:EventsDatabase@juf.org)