

JEWISH UNITED FUND *of* METROPOLITAN CHICAGO

Resource Development Policy Guidelines 2016–2017

JUF RDP Questions?

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

Events Database Questions?

Email: EventsDatabase@juf.org

Revised July 1, 2016

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Jewish United Fund of Metropolitan Chicago
Resource Development Policy Guidelines

PURPOSE

Community needs, locally and globally, require the maximum mobilization and coordination of our communal resources. This is a core objective of JUF, and our Jewish community's primary source of raising funds is the JUF Annual Campaign. While JUF recognizes the significant need for supplemental fundraising efforts by its Beneficiaries and Affiliates to address the community's 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 structure and centralize fundraising efforts for our donors and the community, to maximize dollars raised on all fronts, to reduce conflicts between JUF and agency fundraising efforts and also to advocate—on JUF's behalf—the primacy and efficiency of the JUF Annual Campaign to meet our community's needs.

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

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

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

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

PARTNERSHIP

JUF/JF PARTNERSHIP LANGUAGE

As an expression of the mutually beneficial partnership between Agencies/Day Schools and JUF, all materials for Agencies/Day Schools and auxiliaries, whether printed or electronic, are required to include the following partnership language, which lends greater credibility to the agency and helps brand JUF to those who might not know the connection. The partnership language should be clearly legible and should be the larger of the smallest font used on the materials/websites and 8-point type:

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

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

IMPORTANT DATES

JUF CAMPAIGN PERIOD

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

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

- In 2017, the JUF Campaign period is Monday, April 3–Wednesday, June 14.
- In 2018, the JUF Campaign period is Monday, April 2–Wednesday, June 20.

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

- If an agency's event falls within **8 weeks** after the end of the JUF Campaign period, they may promote their event up to **8 weeks** before the event date, even if this falls during the JUF Campaign period.
- Jewish organizations that do not receive financial support from the JUF are urged to cooperate and, in particular, to avoid conflict in their campaign and fundraising event dates with those of JUF during the JUF Campaign period.

In addition, events may **not** be scheduled on the dates of the:

- **JUF Women's Division Lion Luncheon** (typically mid-September/October)
◦ *In 2016, the date is Thursday, September 8, 2016*
- **JUF Advance & Major Gifts Dinner** (typically late October/early November)
◦ *In 2016, the date is Wednesday, October 26, 2016*
- **JUF Vanguard Dinner** (typically late October/early November)
◦ *In 2016, the date is Monday, November 7, 2016*

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

JUF may conduct public fundraising activities throughout the year.

CALENDAR

- **July 2016**—Updated Guidelines and Community Funding Schedule Approvals sent
- **Thursday September 8, 2016**—JUF Women's Division Lion of Judah Luncheon
- **Thursday, September 15, 2016**—Jewish Federation Annual Meeting
- **Wednesday, October 26, 2016**—JUF Advance and Major Gifts Dinner
- **Monday, November 7, 2016**—JUF Vanguard Dinner
- **Monday, April 3–Wednesday, June 14, 2017**—**JUF Campaign period**
- **April 2017**—Budget Submission Materials, including Community Funding Schedules, typically due. The exact dates vary each year and are based on the agency. For more information, contact the Jewish Federation's Planning & Allocations Department
- **July 2017**—Updated Guidelines and Community Funding Schedule Approvals sent
- **Monday, April 2–Wednesday, June 20, 2018**—**JUF Campaign period**

END-OF-YEAR APPEALS

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

Per the 2016-2017 Community Funding Schedules (CFS), the following end of year (EOY) appeals have been approved for December 2016:

- **Akiba Schechter Jewish Day School**—one December email
- **Cheder Lubavitch Hebrew Day School**—one Chanukah mailing
- **Chicago Jewish Day School**—one Chanukah mailing
- **CJE SeniorLife**—one December mailing and one email
- **Ida Crown Jewish Academy**—one Chanukah appeal and one alumni appeal
- **Jewish Child & Family Services (incl. Response, Encompass, and HIAS)**—one December email
- **Jewish Community Centers**—one December mailing and one email appeal
- **Jewish Vocational Services**—one December email
- **Hillel Torah**—one December email
- **Maot Chitim**—one December mailing and one email
- **Rochelle Zell Jewish High School**—one annual appeal mailing and one annual appeal email, one alumni appeal mailing and one alumni appeal email
- **SHALVA**—one EOY mailing, EOY calls, and one email
- **Spertus**—one Chanukah or EOY mailing, one other December email
- **The Ark**—one EOY mailing
- **Solomon Schechter Day School**—one year-end phonothon and one year-end countdown email

If your appeal is not listed above, sending a year-end appeal will be in violation of the JUF Resource Development Policy (RDP) Guidelines and will run the risk of diminishing the effectiveness of the largest single source of revenue we all depend upon.

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

PLANNING

COMMUNITY FUNDING SCHEDULE (CFS)

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

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

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

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

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

JUF EVENTS DATABASE

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

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

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

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

FUNDRAISING

SOLICITATIONS/CLEARING NAMES/SUBMITTING MATERIALS

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

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

When submitting your list of names, please include the donors' addresses, the year and amount of the donors' most recent gift to the agency, as well as the dollar amount for which you will be soliciting the donor(s). Please allow JUF RDP professionals **up to 3 weeks** to get back to you with approvals.

Event materials, mailings, email blasts, web donate pages, etc., may continue to request contributions (i.e., have checkboxes) up to **\$500**. In addition to feeling that public appeals are not consistent with best practices for raising significant dollars from donors, we believe that the current **\$500** ceiling on published materials and websites reinforces the primacy of the JUF Annual Campaign.

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

GENERAL EVENT INFORMATION

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

Groups with honorees should clear the names and what the honorees will be asked for (e.g. the financial contribution to the organization) with 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 March 31 of the following year (unless March 31 were to fall on a Saturday in which case the period would begin Monday, April 2). Other events on a parallel level of the major event (e.g. same or higher anticipated revenue) will be discouraged.

Note that the Campaign period in 2017 is Monday, April 3–Wednesday, June 14.

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

EVENT SPONSORSHIPS/LEVELS

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

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

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

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

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

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

INVITATIONS

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

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

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

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

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

Invitations must contain **JUF partnership language**.

LETTERS OF SOLICITATION

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

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

- When submitting your list of names, please include the donors' addresses, the year and amount of the donors' most recent gift to the agency, as well as the dollar amount for which you will be soliciting the donor(s). Please allow JUF RDP professionals up to 3 weeks for approvals.

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

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

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

WEBSITES

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

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

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

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

Websites may request contributions up to, but not exceeding, **\$500**.

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

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

AD BOOKS & RAFFLE TICKETS

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

Ad book solicitations are permitted for amounts not to exceed **\$750** per person or firm.

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

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

NEWSLETTERS

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

Newsletters must contain **JUF partnership language**.

ANNUAL REPORTS

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

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

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

MEMBERSHIPS

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

Memberships should not be solicited during the JUF Campaign period.

GOLF OUTINGS

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

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

THIRD-PARTY FUNDRAISING

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

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

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

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

OTHER

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

BY THE NUMBERS

\$100—Top individual annual membership amount

\$500—Maximum for:

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

\$750—Highest amount for Ad Book solicitations

\$1,000—Top individual lifetime membership amount

\$5,000—Maximum for:

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

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

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

CAPITAL FUNDRAISING, ENDOWMENTS & GRANTS

CAPITAL FUNDRAISING

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

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

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

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

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

AGENCY ENDOWMENT

Below are the uniform language guidelines for agency endowment invitations, annual reports and program publications, whether such materials are printed or electronic, and on agency websites where the endowment foundation is noted.

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

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

Agency Endowment Events and Programs: The _____ Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Agency Endowment Program, which was established to ensure that _____ and our sister agencies have the necessary resources to meet growing and evolving Jewish community needs. All commitments to the _____ Foundation are recognized as gifts to the Jewish Federation's Centennial Campaign. For more information, please contact the Legacies & Endowments Department at 312-357-4853 or legacy@juf.org.

DAY SCHOOL ENDOWMENT

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

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

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

Day School Endowment Events Programs: The _____ Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Day School Endowment Program, which was established to ensure that _____ and our sister day schools have the necessary resources to meet growing and evolving Jewish community needs. All commitments to the _____ Foundation are recognized as gifts to the Jewish Federation's Centennial Campaign. For more information, please contact the Legacies & Endowments Department at 312-357-4853 or legacy@juf.org.

GRANTS

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

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

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

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

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

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

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

EXHIBIT I: Affiliates, Beneficiaries, Grantees

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, Bernard Horwich Building, Holocaust Community Services

Dina & Eli Field EZRA Multi-Service Center and the JUF Uptown Café 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, JCSF 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, Heichal Home, Holocaust Community Services, JCARES, Jewish Healing Network, Response, J-CERT, JCFS Family Bridges, Eva Cooper Disabilities Program, JUF Legal Advocacy Services, Encompass, Jewish Center for Addiction, Coordinated Healthcare Initiative (JF/JCFS)

JVS Chicago

Chicago City (Downtown), Anshe Motele, Dina and Eli Field EZRA Multi-Service Center, Chicago City (North), West Suburban Office, Northwest Suburban Office, Northbrook Office, Goldie Bachman Luftig Building (Skokie), Duman Entrepreneurship Center and Loan Fund

Maot Chitim

Mount Sinai Hospital Medical Center

Samuel A. Goldsmith Dispensary, Sinai Medical Group, Touhy Health Center Satellite

SHALVA

The ARK

Seymour H. Persky Building, Northwest Satellite

SPECIAL GRANTS

Aliyah Council of Greater Chicago Center for Jewish Genetics

Government Affairs Offices

Springfield, Illinois and Washington, D.C.

Jerusalem Center for Public Affairs

Bernard Zell Anshe Emet Day School

JUF Israel Office

JUF-TOV Volunteer Network

Northwest Suburban Service Project

jBaby/Shalom Chicago

COMMUNITY BUILDING, JEWISH EDUCATION AND CULTURE

Associated Talmud Torahs (ATT)

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

Chicago Jewish Day School

Solomon Schechter Day School

Chicagoland Jewish High School

Community Foundation for Jewish Education

Ta'am Yisrael—A Taste of Israel: 8th Grade Israel Experience

Ariella Joy Frankel Keshet Day School and Keshet Sunday School

REACH Specialized Services in Day Schools

Jewish Community Center of Chicago

Florence G. Heller JCC, Bernard Horwich JCC, Hyde Park JCC, Lake County Jewish Community Campus, Mayer Kaplan JCC, Anita M. Stone JCC, Bernard Weinger JCC

JCC Camps and Vacation

Apachi Chicago Day Camp, Apachi Chicago Day Camp at Weinger JCC, Elaine Frank Apachi Day Camp, "Z" Frank Apachi Day Camp, Apachi Northside Camp, Chi Perlstien Resort and Conference Center

JCC Community-Wide Programs and Service

Maccabi JCC, Pritzker Center for Jewish Education, Sidney N. Shure Kehilla Program, Socialization Services (JCC and Keshet)

Campus Affairs & Student Engagement

The Hillels of Illinois/Israel Education Center

Write On for Israel

Metro Chicago Hillel

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

Northeastern Illinois University

Illinois Institute of Technology

DePaul University

Loyola University of Chicago

Columbia College Chicago

Roosevelt University

School of the Art Institute

Margie K. and Louis N. Cohen

Center for Jewish Life, University of Illinois at Urbana-Champaign

Louis & Saerree Fiedler Hillel Center at Northwestern University

Johanna & Herman H. Newberger

Hillel Center at the University of Chicago

Harriet & Maurice L. Lewis Family

Summer Intern Program in

Jewish Communal Service

Russian Jewish Division

Bradley University

Illinois State University

Northern Illinois University

Western Illinois University

Southern Illinois University,

Carbondale

Hebrew Theological College

Fasman Yeshiva High School

Spertus Institute for Jewish

Learning & Leadership

Telshe Yeshiva

Illinois Holocaust Museum

and Education Center

Synagogue-Federation Commission

Israel Experience Savings Programs

Send-A-Kid-To-Israel Partnership

(SKIP)

Gift of Israel

JUF Bar/Bat Mitzvah Israel

Experience Certificate

Walk with Israel Voucher

JUF Teen Programming

Camp TOV

Diller Teen Fellowship

JTAC: The Jewish Teen Alliance

of Chicago

TOV Monthly Teen Volunteering (MTV)

Voices: The Chicago Jewish

Teen Foundation

Voices Alumni Foundation

RTI: The JUF Research

Training Institute

One Happy Camper

Ehrlich Student Loans

BBYO

Chicago Board of Rabbis

Moishe House

Jewish Community Council

West Rogers Park

Jewish Residential Camp Scholarships

Agudah Midwest, B'nai B'rith Beber,

Bnos Ma'arova, Chi, Habonim Camp

Tavor, Moshava, Negeela Midwest,

Olin-Sang Ruby Union Institute, Ramah,

Yeshivas Hakayitz, Young Judaea

JUF Camp Coupons

JUF Birthright Israel

JUF Right Start

PJ Library

Shorashim

Jewish Student Connection

Board of Jewish Education

iCenter

COMMUNITY RELATIONS & OTHER NATIONAL/LOCAL AGENCIES

Jewish Federations of North America

(JFNA)

National Conference Supporting

Eurasian Jewry

Jewish Council for Public Affairs

Hillel: The Foundation for Jewish

Campus Life

BBYO

American Jewish World Service

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

Israel Action Network

Jewish Labor Committee

National Jewish Center for

Learning and Leadership (CLAL)

America-Israel Cultural Foundation

Hebrew Union College

Yeshiva University

Jewish Theological Seminary

Reconstructionist Rabbinical College

BREAKTHROUGH FUND GRANTEES

Anti-Defamation League

A WORLD OF DIFFERENCE® Institute

CJE SeniorLife

A Medication Abuse

and Misuse Measure

Art in the Moment

Congregation Or Chadash

Journey to Freedom

Continuum Theater

Chicago Jewish Play Reading Festival

InterfaithFamily.com

InterfaithFamily/Chicago Mentoring

Program for Interfaith Couples

Jewish Child and Family Services

Jewish Center for Addiction

Youth Expansion

Synagogue-Community Partnership

Jewish United Fund

Gifts (Gratitude, Inspiration, Family,

Tzedakah and Service)

Hire U

JVS Chicago

Customized Employment

Planning Initiative

Mishkan Chicago

Going Broad, Going Deep

MyJewish Learning

Kveller Chicago

United Synagogue

of Conservative Judaism

Yozma: A Gap Year in Israel

(fiscal sponsorship)

UpStart Bay Area

Bayit Afterschool (fiscal sponsorship)

UpStart: Chicago

URJ NIFTY

Interdenominational Leadership

Training Institute

ISRAEL & OVERSEAS ALLOCATIONS

Primary Overseas Partners

American Jewish Joint Distribution

Committee (JDC)

Jewish Agency for Israel (JAFI)

World ORT

Other Supported Israel

& Overseas Programs

Ein Prat

ELEM

Eretz Hemda

Etgariam

Foundation for the Benefit

of Holocaust Victims in Israel

Jewish People Policy Institute

Israel Children's Zone®

Israel Movement for Progressive

Judaism

Israel Sports Center for the Disabled

Israel Trauma Coalition

Krembo Wings

Masorti Movement

Meitarim

Moishe House – Kyiv

NATAL

Nirim in the Neighborhood

Ohr Torah Stone

Sahi

Schechter Institutes

Shalom Hartman Institute

Sifriyat Pijama

Tsohar

Yaacov Herzog Center

EXHIBIT II: Blank Community Funding Schedule (CFS)

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

Agency: BLANK CFS

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

*Explain Other (h) as an attachment

EXHIBIT III: Sample Community Funding Schedule (CFS)

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

Agency: **SAMPLE**

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

*Explain Other (h) as an attachment

*Other is money that comes in unsolicited

EXHIBIT IV: JUF News Advertising Terms & Policies

JUF NEWS

2016 ADVERTISING TERMS & POLICIES

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

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

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

FUNDRAISING POLICIES

- Given the primacy of JUF's community-based fundraising objectives, advertisements with a fundraising purpose will be evaluated according to JUF's current Resource Development Policy Guidelines. (juf.org/pdf/news/resource_development_policy_guidelines.pdf)
- To reinforce the centrality of the community campaign and minimize overlap, will not accept advertisements from JUF-funded organizations for fundraising events that take place during the JUF Campaign Period (April 3-June 14, 2017). We also cannot accept ads during the JUF Campaign Period for fundraising events that occur outside the specified period.
- Advertisements that appear outside the JUF Campaign Period may list ticket or meal prices, minimum donation and giving level to attend an event up to \$100. Advertisements may never solicit sponsorships, tickets or meal prices, or giving levels over \$100.
- We do not accept advertisements that solicit limited or unlimited donations.
- Advertisements cannot solicit membership in a giving society/group or include a list of participants and/or their gifts to the organization.

OTHER POLICIES

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

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

TERMS & COMMISSIONS

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

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

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

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



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juf.org