

JESF Policies and Procedures

approved by Board of Trustees, January 2014

The Strategic Planning Committee was charged by the Executive Committee with reviewing the Jewish Educational Scholarship Fund (JESF) and making recommendations regarding the future nature of this endeavor and its operation.

A total of 3 meetings were held where the committee looked at the current model and discussed other possible models for JESF. The committee was open to and discussed numerous options including but not limited to changing it to an across the board scholarship not based on need, a hybrid across the board and needs based scholarship and even eliminating it altogether.

It was determined by overwhelming majority opinion that JESF should continue in its current form as a purely needs based scholarship program to assist families who have difficulty paying for their children's Jewish educational experiences.

The second part of the committee's charge involved reviewing the application and allocation process.

The Allocations Committee shared for consideration the challenges and questions that they struggled with in their annual deliberations. Based on this feedback and other considerations put forward by the Strategic Planning Committee members the following recommendations are proposed:

1. The JESF should continue as a needs based tuition assistance program supported both by a congregational budget line item and voluntary contributions.
2. Only full members in good standing are eligible to submit applications.
3. All members regardless of length of membership in the congregation are eligible to apply.
4. Since the scholarships are applied for and awarded each year the allocations committee shall consider the current financial status of the applicant family at the time of application. If a family remains in financial need they remain eligible for a new award regardless of how many times they have received an award in prior years.
5. There should be no cap on the total dollar amount awarded to a family except where limited by available funds.
6. Within a single family there may be multiple children for which application has been made and all the applicant children should be eligible for awards.
7. Each child may only apply for an award for a single educational experience per year. This means that if there are more than one experience planned such as day school and camp the family can only apply for one of these. The family must divulge all the educational experiences planned for the year for each applicant child so that the allocations committee sees and considers the broader picture.
8. The JESF should not prioritize awards by type of experience. The family by choosing a single

experience on their application is setting their own priorities.

9. The Strategic Planning Committee recognizes that there are numerous Jewish educational experiences available and we should not limit awards to any particular stream of Judaism. Families make their own choices for various reasons based on the suitability of an approved program to their child's needs.
10. The Strategic Planning Committee recommends that 5% of the collected funds to a maximum of \$5,000 each year be reserved for late applicants. This is intended to make sure funds are available for programs which are only applied for later on in the year and also be available to assist a family whose need may change unexpectedly in the middle of a year.
11. The Strategic Planning Committee also considered the make up of The Allocations Committee and recommends that the chairperson is appointed or reappointed each year by the congregational president. Furthermore it is recommended that this committee comprise of an additional 4 people to be appointed or reappointed by the committee chairperson on an annual basis with approval of the president. One of the total of 5 should be a financial officer of the congregation. There should be no term limits for this committee. No member of the committee may have children in the age cohort of application eligibility. In the event that all financial officers are ineligible then another officer should be appointed. The names of the committee members should remain confidential.
12. The application forms should be amended to include any additional information needed to satisfy all the requirements in these recommendations. Furthermore it is recommended that applicants be required to submit the first page of their most current IRS 1040 income tax return form in support of their income declared on the application form. In order to preserve confidentiality the application forms and supporting documents shall only be viewed by the Rabbi and the Executive Director. Data from the application form shall be entered into a spreadsheet by the Executive Director omitting all identifying information. The Allocations Committee will use the data in the spreadsheet for their deliberations and determinations. The Rabbi and Executive Director will be available to the committee on an advisory basis but shall not make award determinations.
13. Checks are made out to the institutions not the families. CBS checks require 2 signatures and in this case it should be the financial officer who serves on the allocations committee who is 1 of the signatories. The Rabbi and Executive Director should jointly compare the checks to the awards list to make sure the payments comply with the allocation committees decisions.
14. The Strategic Planning committee recommends that the application and allocation procedures be reviewed periodically and changed when necessary to reflect conditions at that time.
15. No donation can be targeted for any recipient or institution.