



# Community Partner Expectations and Benefits

June 2019

By endorsing a Community Investment check or accepting a wire transfer, Community Partner's confirm and agree to the following:

## Expectations of all Community Partners

1. **Communications:** Federation has joined with other St. Louis funders and philanthropic organizations through the St. Louis Funder's Learning and Evaluation Group (FLEG) to create a document representing our commitment to the Funded Partner Experience. See [the Funded Partner Experience document](#) for these expectations, which we are committed to supporting. Ongoing communication is essential to a positive working relationship. We encourage you to be in touch with your Community Partner Liaison regarding successes and challenges.
2. **Notification of Significant Events:** Federation asks that Community Partners notify the Federation promptly if any materially significant events occur, such as the following, so that Federation may assist in an appropriate manner:
  1. The loss of any single source of Community Partner revenue that represents the lesser of \$100,000 or 5% of annual prior year gross revenues (e.g., loss of government grant, major donation, etc.);
  2. Any borrowing or financial commitment (i) over \$100,000 or (ii) greater than 10% of total organization assets, together with the Community Partner's plan for servicing the loan or fulfilling the financial commitment;
  3. Any resignation or decision to terminate the Community Partner's chief professional officer, chief fiscal officer or comparable position;
  4. Any resignation or decision to remove the Community Partner's chief volunteer officer; or
  5. The Community Partner is threatened with, or a party to, a material legal proceeding, investigation or administrative proceeding that could impact the organization's operations, financial position or ability to fulfill its mission.

In addition, Federation asks that the Community Partner notify upon close of the fiscal year (or earlier, when practical) of any anticipated or realized annual deficit in its operating results in excess of the lesser of \$100,000 or 2% of its annual expenses.

3. **Evaluation Reporting:** The Jewish Federation of St. Louis makes investments in outcomes that address our priority areas and advance our Core Commitments. Receiving a Community Investment requires evaluation reporting. You may contact Nava Kantor, Manager of Impact & Evaluation, at any time with questions.
4. **Marketing and Publicity:** We are proud of our partnership and the important work you do and outcomes you meet, in which we invest. We hope you will promote this relationship and understand that we will as well through the following:
  - Prominently identify yourself as a Federation Community Partner. This may include reference with Federation logo, and/or wording on all Agency letterhead, newsletters, media and other communications releases, websites, publications and at the facility of the

Community Partner. New logo images and window clings with the “Jewish Federation of St. Louis Community Partner” decal are available from your liaison.

- Understand that Federation may include your organization and programs in Federation campaign and marketing materials and/or list you as a Community Partner of the Jewish Federation and you consent to Federation doing so.
- We encourage you to have an appropriate presence at Federation sponsored-events, such as the Federation’s annual meeting, so that we can promote and celebrate our partnership.

## **Benefits to Community Partners receiving a Local Core\* Investment**

We are happy to discuss with you and assist in any of the following:

- Coordinated major gift solicitation.
- Active assistance in seeking supplemental funds on behalf of Community Partner.
- Reasonable assistance in addressing unanticipated operational and financial contingencies.
- Access to technical assistance, capacity-building training and consultation from the Federation and its national network.
- Assistance in executive job searches.
- Option to participate in cost saving ventures, including joint purchasing and general liability insurance.
- Option to participate in pooled investment of endowments, including the St. Louis Jewish Community Foundation, supervised by experts in the field.
- Possibility of increasing other sources of revenue, including funds from the Federation’s endowment and deferred giving program, as well as government, corporate and foundation grants.
- Assistance and benefit of the work of the Government Relations office in Jefferson City which represents the entire Community Partner system.
- Extend Federation greetings in person at the Community Partner’s annual meeting.

*\*These benefits are relevant for organizations who previously received a Core Investment.*