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**MATCH provides a funding pool of \$5 million to match \$25,000-\$100,000 gifts to Jewish day schools by donors who are making their first-ever gift to Jewish day school education. Donors who have previously made a gift to Jewish day school education may still participate if their current gift to a Jewish day school is at least five times greater than their largest previous gift.**

**Matching grants will be awarded at a rate of 50 cents to the dollar according to the order in which completed applications are submitted. Matching funds will be available until applications for the entire \$5 million have been submitted and approved.**

**Only grants paid after November 5, 2007 are eligible for matching funds. Applications will be accepted online beginning 12:00 PM EST on November 5, 2007.**

**Applications will be accepted online until 5:00 PM EST January 9, 2008.  
Approved donor gifts must be paid in full by May 1, 2008.**

**Please Note: Because matching funds will be awarded according to the order in which completed applications are submitted, submission of an application prior to the January 9<sup>th</sup> deadline does NOT guarantee matching funds.**

### **1. Which donors are eligible for this program?**

a) Donors who are making their first ever gift in support of Jewish day school education and who are currently making a gift of \$25,000 - \$100,000 or more to a Jewish day school in North America are eligible to apply for a MATCH.

OR

b) Donors who have previously funded a Jewish day school or Jewish day school project and are now prepared to increase their previous largest gift by at least five times that amount (e.g., from \$5,000 to \$25,000 or \$10,000 to \$50,000) are also eligible. The minimum eligible gift amount for a five times increased gift is \$25,000.

For eligibility purposes, a donor's largest previous gift is the donor's largest previous individual gift or pledge, OR the largest cumulative amount of giving to Jewish day schools in a fiscal year, whichever is the higher amount.

Past pledges to a Jewish day school that were paid as multi-year gifts will be considered as the sum total of the pledge and not the amount of the gift paid in each year.

*Gifts greater than \$100,000 are eligible for matching funds only up to \$50,000.*

*Please note: All gifts must be calculated according to the current US dollar equivalences when the grant is awarded. Matching funds will be awarded according to the currency exchange rate valid on November 5, 2007, the first day that applications will be accepted.*

### **2. Does a donor need to be a current JFN member in order to be eligible?**

Participation in a JFN matching grants initiative is a benefit of JFN membership.

However, if a donor is new to JFN, the MATCH partners have offered to provide a gift of one year of JFN membership as a benefit of participation in the MATCH program.

MATCH membership entitles the new JFN members to an array of JFN benefits, including eligibility for matching grants for a first-time day school grant; access to the Members Only website and JFN Connect, JFN's networking tool; reduced fees on select JFN events; JFN's newsletter and publications.

MATCH membership is only available for the day school donor and not for any additional family members and does not entitle the donor to participate in other JFN matching grants initiatives. MATCH donors who wish to upgrade their MATCH membership for participation in future matching grants initiatives will be offered the opportunity to do so at a reduced fee.

MATCH membership, as a gift from the MATCH partners, is only available to donors who are new to the Jewish Funders Network. Donors who have previously been members of JFN but have allowed their membership to lapse must renew in order to be eligible for the matching grants initiative.

### **3. What is the Jewish Funders Network?**

The Jewish Funders Network (JFN) is an international organization of family foundations, public philanthropies, and individual funders dedicated to advancing the quality and growth of philanthropy rooted in Jewish values. JFN's members include independent philanthropists, foundation trustees and foundation professionals – a unique community that seeks to transform the nature of Jewish giving in both thought and action. At the heart of JFN's programming is the annual JFN International Conference. A safe and inclusive meeting ground for members to develop and improve their grantmaking practices, the Conference provides the opportunity to learn about emerging funding opportunities and form strategic funding partnerships. In addition to the Conference, JFN offers a suite of Foundation Services for members who wish to make their grantmaking more effective, and innovative Matching Grant Initiatives for those who wish to maximize their impact. Through its Younger Funders and Foundation Professionals programs, JFN cultivates the growth of effective networks among younger philanthropists and raises professional standards among the field's most dedicated practitioners.

In its mission and through its work, JFN adheres to a fundamental set of Jewish values. Membership is open to individuals and foundations that give away at least \$25,000 annually in philanthropic dollars, and do so in the name of Jewish values, no matter whether the funds go to specifically Jewish causes or to broader areas. JFN is not a grantmaking organization and has no political agenda or affiliation. Solicitation of members is not permitted and all member information is kept strictly confidential.

### **4. Must a gift come from one donor?**

Yes. Eligible donors can be either an individual donor with their spouse/partner, a family foundation or other foundation. Individual donors or spousal units may choose to make a gift from a donor advised fund. Combined gifts from multiple donors such as siblings, parents and adult children, friends, business partners or any other independent donors will not be eligible for matching funds.

### **5. What types of gifts are eligible for matching funds?**

Gifts must be directed toward an eligible Jewish day school located in the United States or Canada.

Gifts to non-day school institutions, even if they are for programs to benefit or support Jewish day school education are not eligible for MATCH. Examples of such **non-eligible** gifts would include: contributions to a local federation campaign for day schools; a day school teacher training program at a local Board of Jewish Education; a community foundation day school endowment campaign; an independently operated scholarship program for day school students.

Eligible gifts must be in support of program or operating expenses at a Jewish day school in North America.

Gifts to endowment funds at a Jewish day school or to an outside entity in support of a Jewish day school are not eligible.

Gifts to support capital projects at a Jewish day school are not eligible for matching funds. Capital projects are those which construct, renovate, or purchase physical assets.

Please note that while gifts may not be in support of a day school education project, endowment funds or capital, previous gifts by the donor in any of these categories make the donor ineligible to participate (unless the gift to be matched is a five times increase of their largest previous gift to support or benefit day school education). These gifts will be counted toward a donor's giving history and to the calculation of the largest previous gift amount and may make the donor ineligible.

Matching funds are only available for gifts which have been paid after November 5, 2007.

#### **6. Can a donor earmark a gift for a particular program or purpose?**

Yes. Both gifts to general operating expenses as well as those earmarked for a particular program or project at a day school are eligible for matching funds. However, gifts to endowments or for capital projects are NOT eligible for matching funds.

#### **7. Which Jewish day schools are eligible for matching funds?**

Eligible Jewish day schools must be elementary, middle schools or high schools or a combination of those grades. Independent pre-schools are not eligible for matching funds.

An eligible Jewish day school has the following attributes:

- a. Values Judaic studies as demonstrated by its curriculum, teacher training, and successful student preparation for further Judaic studies.
- b. Values General studies as demonstrated by its curriculum, teacher training, and successful student preparation for further general studies.

c. Values the State of Israel by attesting to the following statement:\*\*

*“The creation of the State of Israel is one of the seminal events in Jewish history. Recognizing the significance of the State and its national institutions, we seek to instill in our students an attachment to the State of Israel as well as a sense of responsibility for its welfare.”\**

\*We agree to the significance of the State of Israel and of its national institutions, although, as in every democracy, we may not agree with all of the policies and decisions of the institutions.

\*\* Attesting to the Israel statement is an eligibility requirement established by the MATCH program. Donors and schools should be aware that adherence to the Israel statement requires that school programs, curriculum and school culture demonstrate this attitude toward the state of Israel.

The names of schools that participate in MATCH will be published in an ad containing the Israel statement.

All completed applications will be reviewed by a committee comprised of MATCH representatives and all decisions of eligibility will be at the committee’s sole discretion. The determination of the committee shall be final, binding and conclusive as to all questions and decisions of donor eligibility, school eligibility and grants.

**8. If a donor has previously given a gift to a Jewish educational organization that is not a day school or day school related project – eg., a synagogue education program, a Jewish summer camp, a Hebrew supplementary school, or a rabbinical seminary – can the donor still be eligible for MATCH?**

Yes. Only prior gifts to support or benefit Jewish day schools render a donor ineligible (without a five times increase). MATCH is designed to foster interest in Jewish day school philanthropy and we welcome gifts from donors who have been engaged in other forms of Jewish education, both formal and informal, and are now interested in expanding their Jewish philanthropy to day school education.

**9. If a donor has previously given a gift to a Jewish day school or a day school related project and is now making a first gift to a different Jewish day school, is this gift eligible?**

No, unless the donor’s current gift is at least five times greater than the donor’s previous largest gift to a day school or day school education project. MATCH targets first gifts to Jewish day school education, not first gifts to a particular day school.

**10. What is the ratio of the matching grant to the donation?**

Eligible gifts will be matched at a rate of 1:2. This means that for every U.S. dollar granted by a donor, MATCH will provide an additional \$.50. Thus a gift of \$25,000 will

be matched at \$12,500, a gift of \$50,000 will be matched at \$25,000, and a gift of \$100,000 will be matched at \$50,000. The maximum amount of matching funds available for an individual donation will be \$50,000.

**11. How much money is available in the matching funds pool?**

In 2007-2008 the matching funds pool will be \$5 million. This pool of matching funds is finite. Grants will be evaluated and awarded according to the order in which a completed application is submitted until the \$5 million is exhausted.

**12. Will all eligible gifts be matched by MATCH?**

No. Applications will be evaluated and matching funds awarded according to the order in which they are completed and submitted until the entire \$5 million has been allocated.

The application will consist of a two part grant application. (See below #18.) Only when both parts of the application are completed in full and submitted, will the application be evaluated. Funds will then be allocated according to the order in which they are submitted on a first come, first serve basis.

Submitting an application prior to the deadline date of January 9, 2008 does **NOT** guarantee consideration for a grant.

Once completed applications totaling \$5 million in requests have been submitted, all additional applications will be placed on a waitlist. In the event that some of the earlier applications submitted prove to be ineligible, applications will be taken off the waitlist and evaluated according to the order in which they were submitted.

**13. What if a donor's gift is not awarded matching funds?**

As indicated above, the matching grant pool for this initiative is \$5 million and finite. We thus anticipate that there will be some donors and schools whose gifts will not be awarded matching funds. Donors and schools should note that submission of an application to MATCH does not obligate the donor to make the proposed gift. While we certainly hope that a donor will make the proposed gift even without the matching funds, and encourage donors to do so, MATCH understands that some donors might choose not to make their gifts in the absence of the matching funds.

**14. Is there a maximum amount of funds that an individual day school may receive through MATCH?**

There will be a cap of \$50,000 on the amount of matching funds that any individual Jewish day school may receive. This means that any institution that receives more than \$100,000 in grants may still only receive \$50,000 in matching funds.

Each day school may only submit applications for gifts totaling \$100,000 which are eligible for \$50,000 in matching funds. Donors and day school professionals should communicate to ensure that the total amount from all of a school's applications is within the school's funding cap.

**15. Are there specific desirability criteria to determine which gifts are matched?**

No. In the event of more applications than funds, matches will be awarded based on the order in which fully completed eligible applications are submitted.

**16. Can a donor submit more than one proposal for matching support?**

We are only able to accept one matching grants application from each donor unit.

**17. How can a donor learn more about the needs or opportunities for funding Jewish day schools?**

Please visit [www.dayschoolmatch.org](http://www.dayschoolmatch.org) where you will find resources on funding Jewish day schools that can help clarify the needs and opportunities. In addition, the resources of both PEJE, the Partnership for Excellence in Jewish Education ([www.peje.org](http://www.peje.org)) and the Jewish Funders Network ([www.jfunders.org](http://www.jfunders.org)) are available to assist you.

If you are a donor please contact Jonathan Horowitz at 212-726-0177 ext. 218 or email [jonathan@jfunders.org](mailto:jonathan@jfunders.org). If you are a representative of a Jewish day school please contact Sheila Alexander at PEJE at 617-367-0001 ext. 130 or email [sheila@peje.org](mailto:sheila@peje.org).

**18. How do a donor and a school apply for matching funds?**

The application process consists of two parts. An application will be considered complete only when both parts have been submitted:

Part I. An online application will be available on the MATCH website ([www.dayschoolmatch.org](http://www.dayschoolmatch.org)) starting November 5, 2007.

If a donor has extenuating circumstances that prevents her/him from filling out the application form online, please contact Jonathan Horowitz at (212) 726-0177 ext. 218 or [jonathan@jfunders.org](mailto:jonathan@jfunders.org). Applications submitted through the mail will not be eligible unless the donor has received prior approval to submit offline.

The online application requires submission of both the donor and day school's contact information. The donor will provide answers to questions related to motivation for making the gift and philanthropic interests. The day school professional will provide information about the day school and usage of grant funds.

To see what a sample online application looks like and requires visit [www.dayschoolmatch.com](http://www.dayschoolmatch.com)

Part II. Donor eligibility statement: a form personally signed by the donor indicating knowledge of the matching grant program, intention to make the gift if awarded matching funds and attesting to compliance with the terms and conditions of the program. This form will be a document downloadable from the MATCH, JFN and PEJE websites, which the donor must complete, sign and fax to 1-866- 701-5812.

Once **both** parts of the application have been fully completed and submitted the application will be considered for matching funds.

**19. How do donors and day schools fill out the online application?**

Donors and day school professionals will fill out the online application jointly, with distinct information provided by each party. Either the donor or the day school professional can initiate the application.

Before filling out the application form, whoever initiates the application, will be directed to an Eligibility Screener.

This eligibility screener was created from the perspective of the donor making the gift and will help clarify the MATCH requirements and determine the donor's eligibility. If the donor's answers to the screener indicate that the donor is eligible, then the application initiator will be directed to the online form.

**20. Does the online application form have to be filled out in one sitting? Does the donor or the day school professional have to fill out the form independently?**

Donors and day school professionals should work together to complete the online application. Either the donor or the day school professional can initiate the application, however, it is important that the donor is responsible for those sections requiring donor information and the day school professional is responsible for those sections about the day school.

At any point the person filling out the application may leave the online application in progress and save the draft. To exit the application click on the button that reads "Save Draft" that appears on the bottom of each tab of the application. You will then be prompted to submit your email address. You may enter more than one email address. The online system will then send to the address(es) entered an email containing a weblink to the saved application. Clicking on this web link (or pasting it into your web browser) will take you back to the application in progress.

In order to share the application between donor and professional, the person initiating the application can save the application in progress and either enter the donor/professional's email address along with their own or alternatively, the initiator can forward the web link to any other person they would like to allow access to the application.

For more information, or if you are having any trouble with the online application form, send an email to [jonathan@jfunders.org](mailto:jonathan@jfunders.org) or call the JFN office at (212) 726-0177 ext. 218.

**21. What is the timing of the matching grant process?**

The MATCH program will be announced in September 2007.

The application process will begin on November 5, 2007. Matching funds will only be available for gifts paid after November 5, 2007. MATCH is an incentive grant program to encourage new gifts and is not available for pre-existing donor gifts.

Applicants will only be able to access and submit both the online application and the donor eligibility statement after 12:00 PM EST November 5, 2007. Applications will be evaluated and grant funds awarded according to the order in which fully completed applications (both the online form and Donor Eligibility Statement) are submitted. Once applications have been submitted requesting the entire \$5 million in matching funds any subsequent applications will be placed on a waitlist. At this point, MATCH will post notices on the JFN, PEJE and MATCH websites indicating that all subsequent applications will be placed on the waitlist.

To be considered for funding all applications must be submitted online by 5:00 p.m. EST on January 9, 2008. Because of the volume of applications we anticipate for MATCH, submission of an application prior to the deadline does NOT guarantee matching funds.

The Jewish Funders Network and PEJE will evaluate completed applications to determine eligibility. Donors and schools will only be notified whether their applications are awarded matching funds once the entire eligibility process has been completed and grants have been approved totaling \$5 million in matching funds. In the event that the eligibility evaluation process determines applications to be ineligible, applications that had been placed on the waitlist will then be moved up according to the order in which they had been submitted.

Matching grant recipients and awards will be announced by JFN and PEJE on or about January 31, 2008.

Once donors and schools have been notified that their grant application has been approved for matching funds, JFN will accept verification documents indicating that the gift payments have been made. Once verification documents have been approved, JFN will issue grant payments directly to the schools.

In order to receive matching funds donors must pay their gifts in full by May 1, 2008.

Documentation verifying donor payments must be received at JFN by June 2, 2008.

## **22. Does a donor have to pay her/his gift all at once?**

No. The applicant must include the total amount of the gift s/he plans to give when filling out the online application. However, this gift does not have to be paid all at once. If necessary, the gift can be paid in installments of any amount over the course of the matching grant cycle, from November 5, 2007 to May 1, 2008. The only stipulation is that the matching funds will not be released to the donor's school until the gift has been completely paid. For example, if the gift is paid in installments over the course of the

grant cycle, but the final payment is not made until April, 2008, no part of the matching funds will be released until April, when it will be paid in full.

The Jewish Funders Network will review verification documentation and begin to issue checks once the MATCH awards have been announced.

### **23. What is the deadline for submitting an application?**

The deadline date for submitting an application is 5:00 PM EST January 9, 2008.

However, please be aware that we anticipate reaching the grant capacity prior to the deadline date. Submitting an application prior to the deadline date does **NOT** guarantee consideration for a grant. Completed grant applications will be accepted and dated according to the order in which they are submitted. Applications will not be dated or considered complete until all portions of the application are completed and submitted. This includes Part I, the online application, and Part II, the donor eligibility statement.

### **24. How will I know if the MATCH grant is still available?**

Once MATCH receives completed applications requesting \$5 million in matching funds, an announcement will be posted on [www.dayschoolmatch.org](http://www.dayschoolmatch.org); on the JFN website, [www.jfunders.org](http://www.jfunders.org); and on the PEJE website [www.peje.org](http://www.peje.org).

Any additional applications received after the \$5 million has been exhausted will be placed on a waiting list in the event that any previous applications are deemed ineligible during the review process.

### **25. Terms and Conditions of the Application and Review Process:**

Please note: grant eligibility will be determined according to amount and payments in US\$. Matching funds will be calculated according to the currency exchange rate valid on November 5, 2007.

Completed applications must be submitted no later than 5:00 pm EST, Friday, January 9, 2008. Because of the volume of applications we anticipate for MATCH, submission of an application prior to the deadline does **NOT** guarantee matching funds.

All applications will be reviewed by a committee comprised of MATCH representatives and all decisions will be at their sole discretion. The determination of the committee shall be final, binding and conclusive as to all questions and decisions of eligibility and grants.

Gifts must be cash (checks or wire transfers) or transfers of publicly traded stock. Illiquid stocks, annuities, Israel Bonds, or other slowly maturing instruments are not allowed. Please also note that we cannot match gifts that are made in the form of tangible goods such as Torah scrolls, land, computer equipment or any other items given in place of cash or stock.

Matching grants will be paid once donors and schools are notified of the award and payment of the approved grant is verified. In order to verify payment, the MATCH program requires a copy of a canceled check, the wire receipt for the amount of the grants or other proof deemed satisfactory by MATCH. To download a document describing the verification process and acceptable documentation visit [www.dayschoolmatch.com](http://www.dayschoolmatch.com).

The terms and conditions and availability of MATCH Matching Grants are subject to change and/or termination at any time.

MATCH, its funders, JFN and PEJE do not make any statement or representation as to the tax consequences of the receipt by a Grantee of any award, grant or funds from the program. Funders and prospective Grantees should consult their own tax, accounting and legal advisors regarding the tax or other treatment of matching grants.

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