



2008 Survey of New Jewish Organizations Questionnaire

Jumpstart / Natan / The Samuel Bronfman Foundation

1 In what year was your organization/project/initiative founded? (If you are responding for a program/initiative that is part of or housed in a larger organization, please enter the year when the program/initiative was founded.)

- | | | |
|---------------|--------|--------|
| ▪ before 1995 | ▪ 1999 | ▪ 2004 |
| ▪ 1995 | ▪ 2000 | ▪ 2005 |
| ▪ 1996 | ▪ 2001 | ▪ 2006 |
| ▪ 1997 | ▪ 2002 | ▪ 2007 |
| ▪ 1998 | ▪ 2003 | ▪ 2008 |

2 Where is your organization/project/initiative headquartered?

- City/Town:
- State:
- ZIP/Postal Code:

3 What is your organization's total operating budget for your current fiscal year? (If you are responding for a program/initiative that is part of or housed in a larger organization, please enter the budget for the program/initiative.)

- | | |
|---------------------------|-----------------------------|
| ▪ up to \$50,000 | ▪ \$1,000,001 - \$1,500,000 |
| ▪ \$50,0001 - \$100,000 | ▪ \$1,500,001 - \$2,000,000 |
| ▪ \$100,001 - \$500,000 | ▪ \$2,000,001 - \$2,500,000 |
| ▪ \$500,001 - \$1,000,000 | ▪ more than \$2.5 million |

4 Please pick the corporate structure that best describes your organization/project/initiative and how it receives charitable contributions & grants. (If your organization has a pending tax-exemption application or is in transition from one status to another, please indicate its *current* legal status, not where it's headed.)

- Independent entity (corporation, LLC, etc.) with its own 501(c) tax-exempt status REQUIRED to file annual IRS Form 990, 990EZ, 990PF, or 990 postcard
- Independent entity (corporation, LLC, etc.) with its own 501(c) tax-exempt status NOT REQUIRED to file annual IRS Form 990 (i.e., what the IRS considers a "church")
- Independent tax-exempt religious corporation without formal 501(c) status
- Independent entity (corporation, LLC, etc.) with fiscal agent/receiver
- Managed project with fiscal sponsor
- Independent unincorporated association with neither formal tax status nor fiscal agent
- Subsidiary program/initiative (part of a larger organization) WITH autonomous budget & fundraising authority/responsibility
- Subsidiary program/initiative (part of a larger organization) WITHOUT autonomous budget & fundraising authority/responsibility
- For-profit enterprise / private business (including S- and C-corporations)
- Israeli Amuta
- Other (please specify)

4a Please enter the name of your organization's fiscal sponsor, fiscal agent, or fiscal receiver, through which it receives charitable contributions & grants.

5 For each of the following practices, please indicate the action your organization has taken.

	Implemented more than 1 year ago	Implemented within the past year	4. Plan to implement	No plans to implement	5. N/A
Audited financial statements					
Formed audit committee					
Formed executive compensation committee					
Established whistle-blower procedures					
Established document retention/destruction procedures					
Established conflict of interest procedures for board members & key employees					
Purchased Directors' and Officers' (D&O) insurance					

6 Which, if any, of the following are covered by your organization's non-discrimination policy?

- | | |
|--|---|
| <ul style="list-style-type: none"> ▪ Our organization does not have a non-discrimination policy. ▪ Age ▪ Race ▪ Color ▪ Religion ▪ Ancestry ▪ Ethnicity ▪ National origin ▪ Citizenship status ▪ Sex ▪ Sexual orientation | <ul style="list-style-type: none"> ▪ Gender identity or expression ▪ Marital status ▪ Disability ▪ Genetic condition ▪ Medical condition ▪ Carrier status ▪ Pregnancy status (including, but not limited to, pregnancy, childbirth, and medical conditions related to pregnancy or childbirth) ▪ Veteran status ▪ Other (please specify) |
|--|---|

7 Which of the following categories best corresponds to your organization's mission & programs (choose one)? NB: These are official NTEE categories. If your organization is listed on Guidestar.org, then your NTEE category is available in your profile there. Please use "Religion-related" only to describe spiritual communities, inter-religious dialogue programs, etc.

- | | |
|--|--|
| <ul style="list-style-type: none"> ▪ Animal-Related ▪ Arts, Culture & Humanities ▪ Civil Rights, Social Action & Advocacy ▪ Community Improvement & Capacity Building ▪ Crime & Legal-Related ▪ Diseases, Disorders & Medical Disciplines ▪ Education ▪ Employment ▪ Environment ▪ Food, Agriculture & Nutrition ▪ Health Care ▪ Housing & Shelter ▪ Human Services ▪ International, Foreign Affairs & National Security | <ul style="list-style-type: none"> ▪ Medical Research ▪ Mental Health & Crisis Intervention ▪ Mutual & Membership Benefit ▪ Philanthropy, Voluntarism & Grantmaking Foundations ▪ Public & Societal Benefit ▪ Public Safety, Disaster Preparedness & Relief ▪ Recreation & Sports ▪ Religion-Related ▪ Science & Technology ▪ Social Science ▪ Youth Development ▪ Other/Unknown |
|--|--|

8 Approximately how many individuals...

- ...visit your website each month?
- ...are on your mailing list?
- ...personally attended at least one event/program in 2008?
- ...are part of your core community / regularly participate in your events & programs?
- ...made a financial contribution to your organization this past year?

9 In terms of your organization's programs and initiatives, what proportion of your constituents and/or participants are... (Please enter percentages as whole numbers that add up to 100.)

- ...Millennials/Generation Y (early to mid-20s & younger, born 1983-present)?
- ...Generation Xers (mid-20s to early 40s, born 1965-1982)?
- ...Baby Boomers (mid-40s to early 60s, born 1946-1964)?
- ...pre-Boomers (mid 60s & older, born before 1946)?

10 How do you think each of the following constituencies would describe your organization's connection to Judaism, Jewish life, and Jewish values? (Please mark "n/a" for any constituency not applicable to your organization.)

	No connection	Inspired or informed by them, but not an explicitly "Jewish" organization	Clearly motivated by and committed to Judaism / Jewish life & values	N/A
Board members				
Non-board Volunteers				
Employees				
Members				
Clients/beneficiaries				
Other program participants				
Program delivery partners within the Jewish community				
Program delivery partners outside the Jewish community				
Media/press				
Jewish funders				
Non-Jewish funders				

- Additional comment (optional)

11 To the best of your knowledge, approximately what percentage of your constituents, participants, and/or donors... (Please enter as a whole number percentage without the %.)

- ... are deeply involved in the organized Jewish community in many ways, in addition to your organization?
- ... are moderately involved in the organized Jewish community?
- ... have no meaningful connection to the organized Jewish community other than through your organization?

12 Do you have ready access to current, detailed information about your organization's budget and finances? By current, we mean not more than one month old.

- Yes
- No
- Not sure

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- 13 What is your organization's total operating budget for your current fiscal year? (Please enter a whole number without the dollar sign or commas.)**
- 14 Which of the following are your organization's four (4) most important sources of support? (To compare cash sources with non-cash sources - pro bono services, food, space, etc., - consider what it would have cost to pay for them.)**

	Most important source of support	#2 source of support	#3 source of support	#4 source of support
Membership income				
Individual donations (not including bequests)				
Bequests or other planned gifts				
Corporate (non-foundation) grants				
Corporate sponsorships of events and/or programs				
Foundation general operations grants				
Foundation program grants				
Special fundraising events/activities				
Volunteer labor (non-board, but include administration/office, fundraising, and program volunteers)				
Pro bono professional services (legal, accounting, consulting, etc.)				
In-kind contributions (e.g., meals/food, free use of space, etc.)				
Fees for program services				
Retail sales				
Investments				
For-profit business ventures				
Other unrelated business income (royalties, rental income, sales of assets other than inventory, etc.)				

- Other (please specify)

- 15 If you have program service fees, retail sales, investments, for-profit ventures, or other unrelated business income, please describe it here.**
- Program service fees (e.g., tuition, registration, consulting, other services offered for a fee by your organization)
 - Retail sales (e.g., publications, CDs, DVDs, other products made & sold by your organization)
 - Investments (e.g., securities, funds, money market interest, etc.)
 - For-profit ventures (e.g., any projects/products generating taxable income)
 - Other unrelated business income
- 16 How many full-time employees, part-time employees, and program-related independent contractors or consultants does your organization have? If your organization is entirely volunteer-run, please put "0" in each box.**
- Full-time employees
 - Part-time employees
 - Program-related independent contractors or consultants
- 17 In your operational budget, do you allocate employee compensation costs within each department, or do you group all employee costs under a single HR category? (Please note: this question is about W-2 employees, not 1099 contractors.)**
- Employee costs allocated within each department
 - All employee costs aggregated within a Human Resources department
 - Our organization does not have any of its own W-2 employees.
 - Our initiative is a subsidiary program with no direct operations or HR departments.
- 18a Approximately what proportion of your organization's expenditures during the current fiscal year has gone to the following functions? Please enter percentages as whole numbers that add up to 100.**
- OPERATIONS: Includes all administrative costs, as well as rent, professional fees, facilities, supplies, equipment and travel. Also includes total costs for operations staff and contracted labor, including salary/compensation, benefits, and taxes.
 - HUMAN RESOURCES: Includes costs for administering human resources and personnel, including benefits administration fees and other costs. Also includes total costs for Human Resources staff and contracted labor, including salary/compensation, benefits, and taxes.
 - DEVELOPMENT: Includes all costs directed toward promotion and fundraising, including events, campaigns, PR and advertising. Also includes total costs for Development staff and contracted labor, including salary/compensation, benefits, and taxes.
 - PROGRAM: Includes all expenditures on mission-related activities such as service delivery, publishing, advocacy, performances, projects, etc. Also includes total costs for Program staff and contracted labor, including salary/compensation, benefits, and taxes.

18b Approximately what proportion of your organization's expenditures during the current fiscal year has gone to the following functions? Please enter percentages as whole numbers that add up to 100.

- OPERATIONS: Includes all administrative costs, as well as rent, professional fees, facilities, supplies, equipment and travel.
- DEVELOPMENT: Includes all costs directed toward promotion and fundraising, including events, campaigns, PR and advertising. Also includes total costs for any development-related independent contractors, such as fundraising consultants.
- PROGRAM: Includes all expenditures on mission-related activities such as service delivery, publishing, advocacy, performances, projects, etc. Also includes total costs for any program-related independent contractors.

18c Approximately what proportion of your organization's expenditures during the current fiscal year has gone to the following functions? Please enter percentages as whole numbers that add up to 100.

- OPERATIONS: Includes all administrative costs, as well as rent, professional fees, facilities, supplies, equipment and travel.
- HUMAN RESOURCES: Includes total labor costs, including salary/compensation, benefits, benefits admin fees and taxes. (Please include program-dependent contractor fees under program, below.)
- DEVELOPMENT: Includes all costs directed toward promotion and fundraising, including events, campaigns, PR and advertising.
- PROGRAM: Includes all expenditures on mission-related activities such as service delivery, publishing, advocacy, performances, projects, etc. This includes program-dependent contracted labor costs.

18d Approximately what proportion of your organization's expenditures during the current fiscal year has gone to the following functions? Please enter percentages as whole numbers that add up to 100.

- SUPPORT COSTS: Includes all administrative costs associated with the program, including program-specific rent, professional fees, facilities, supplies, equipment and travel.
- STAFF COSTS: Includes total costs for all W-2 personnel associated with your program, including salary/compensation, benefits, benefits admin fees and taxes. (Please include program-dependent contractor fees under program, below.)
- DEVELOPMENT/FUNDRAISING: Includes all costs directed toward promotion and fundraising for this program, including events, campaigns, PR and advertising.
- DIRECT PROGRAM COSTS: Includes all non-employee-related expenditures on program-related activities such as service delivery, publishing, advocacy, performances, projects, etc. This includes program-dependent contracted labor costs.

19 Which, if any, of the following benefits does your organization currently offer to its employees (mark all that apply)?

- HMO
- PPO
- Other health insurance
- Dental
- Vision
- Paid short-term mental health counseling
- Acupuncture/chiropractic plan
- Health reimbursement accounts / flexible spending accounts
- Employee-paid benefits basket/menu (pre-tax dollars)
- Employer-paid benefits basket/menu
- Access to COBRA benefits following employment separation
- 401(k) or 403(b) retirement plan
- Retirement contribution matching
- Other retirement plan
- Life insurance
- Long-term disability insurance
- Transportation/commuter/parking benefits
- Tuition benefits
- Paid vacation
- Paid personal/sick days
- Paid Jewish holidays
- Paid state & federal holidays
- Paid maternity leave
- Paid paternity leave
- Paid dependent care or elder care leave
- Paid bereavement leave
- Flex-time scheduling
- Paid professional development / continuing education
- Other (please specify)

20 How does your organization currently contribute toward payment of medical insurance premiums?

- We pay a percentage of the premium for employees AND dependents.
- We pay a percentage of the premium for employees ONLY.
- We pay a fixed dollar amount toward the premium for employees AND dependents.
- We pay a fixed dollar amount toward the premium for employees ONLY.
- We offer an employee-paid medical insurance plan payable with pre-tax dollars.
- We do not offer health insurance.
- Other (please specify)



21 Please indicate the extent to which your organization uses non-board volunteers for each of the following areas.

	None	0-1/4 of the work is done by volunteers	1/4 to 1/2 of the work is done by volunteers	1/2-3/4 of the work is done by volunteers	More than 3/4 of the work is done by volunteers
Programs and Services					
Fundraising					
Administration/Office Operations					

- Additional comment (optional)

22 Please indicate how important non-board volunteer assistance is for each of the following areas.

	Not important	Somewhat important / Supplemental	Important	Very important	Extremely important / Mission critical
Programs and Services					
Fundraising					
Administration/Office Operations					

- Additional comment (optional)

23 Has your organization decided to take any of the following actions due to the economy? (Please do not speculate on possible actions: mark only those actions your organization has taken or definitely will take.)

- | | |
|---|--|
| <ul style="list-style-type: none"> ▪ Planning no actions; our revenue looks good for the next year ▪ Changing your organization's mission ▪ Merging with another organization ▪ Temporarily suspending operations ▪ Sunsetting or closing your organization ▪ Moving to less expensive offices ▪ Sharing office space with another organization ▪ Sharing employees with another organization ▪ Renegotiating or canceling existing office service contracts ▪ Outsourcing back office functions ▪ Reducing the marketing budget ▪ Reducing the scope of programs or services | <ul style="list-style-type: none"> ▪ Suspending or canceling programs or services ▪ Delaying planned new initiatives ▪ Freezing new hires ▪ Freezing salaries ▪ Freezing benefits ▪ Reducing staff hours ▪ Reducing fixed salaries ▪ Reducing benefits ▪ Requiring unpaid leave ▪ Reducing administrative staff ▪ Reducing program staff ▪ Reducing fundraising staff ▪ Reducing human resources staff ▪ Reducing management staff ▪ Other (please specify) |
|---|--|

24 How would you rate your organization's capacity in each of the following areas?

	Clear need for increased capacity	Basic level of capacity in place	Moderate level of capacity in place	High level of capacity in place	N/A
Mission, Vision, Strategic Planning					
Human Resources Management					
Leadership Development					
Financial Management, Planning & Budgeting					
Board Recruitment & Development					
Legal, Tax, & Insurance					
Marketing, Communications, & External Relations					
Fund Development, Fundraising					
Program Planning, Design & Evaluation					
Program Implementation & Execution					

- Additional comment (optional)

25 How important are the following technologies for communicating with your organization's constituents (including employees, volunteers, participants, members, and funders)?

	Not being used	Useful tool	Important tool	Mission- critical tool
Website				
Blog				
Email/newsletter management system (e.g. ConstantContact, PatronMail, etc.)				
Hosted discussion groups/message boards				
Online surveys (e.g., SurveyMonkey, Zoomerang, etc.)				
Social bookmarking (e.g. Digg, Furl, Del.icio.us, etc.)				
Multimedia (e.g., YouTube, Vimeo, etc.)				
Social networking (e.g. Facebook group/page/cause, LinkedIn network/group, etc.)				

- Other (please specify)

26 Which of the following services offered for free or at a discount would make the greatest positive impact on your organization's health? (Please choose up to 3, in order of impact.)

	Greatest impact (rank #1)	Moderate impact (rank #2)	Some impact (rank #3)
Professional development training/seminars			
Insurance discounts (D&O, general, liability, property)			
Financial planning & budgeting			
Organizational development training/seminars			
Videoconferencing facilities			
Pro bono or discounted professional services (accounting, legal, fundraising consulting, etc.)			
Program evaluation & research			
Training in the use of social media			

- Additional suggestions (optional)

27 What impact, if any, would the following have on your organization's ability to achieve its mission & vision? (If your organization is already doing one or more of these, please mark "no impact" and/or note it in the comments.)

	Very negative impact	Somewhat negative impact	No impact	Somewhat positive impact	Very positive impact
Merging with another organization with a similar mission/vision					
Sharing office space with other organizations					
Reducing office hours and/or days to save on utility bills and/or hourly staff					
Joining an employee benefits pool (larger group for health insurance, etc.)					
Sharing technology/IT staff (webmaster, programmer, etc.) with other organizations					
Sharing administrative staff with other organizations					
Sharing program staff with other organizations					
Coordinating event/program calendars with other organizations					
Developing programs jointly with other organizations					
Prioritizing earned revenue opportunities over fundraising and grantwriting					

- Additional suggestions (optional)

28 Would any of the following people be interested in roundtable discussions to explore individual and joint strategies during the economic downturn (mark all who apply)?

- | | |
|---|--|
| ▪ Executive director / CEO | ▪ Financial / accounting staff |
| ▪ COO / CFO | ▪ Program staff |
| ▪ Other executive or administrative staff | ▪ Key volunteers / lay leaders |
| ▪ Board members | ▪ No, thanks |
| ▪ Development / fundraising staff | ▪ What topics would you like to discuss? |



29 Is your organization affiliated with any of the following? (Please mark all that apply.)

- Ashoka
- S3K Jewish Emergent Initiative
- Joshua Venture
- Echoing Green
- ROI 120
- REBOOT
- Jumpstart
- UpStart Bay Area
- Bikkurim
- Slingshot
- Mechon Hadar / Minyan Project
- Presentense
- Professional Leaders Project
- Selah Leadership Network
- Your local nonprofit support center
- Your state or regional association of nonprofits
- Other (please specify)

30 If you could tell other leaders of new nonprofits one way you all could be helpful to one another, what would you suggest?

31 If you could tell funders one way they could be helpful (other than through increased direct funding), what would you suggest?

32 Finally, one question about you. Which of the following best describes your role in the organization for which you've just taken this survey?

- Executive director / CEO
- COO / CFO
- Other executive or administrative staff
- Board chair
- Board member
- Development / fundraising director
- Other development or fundraising staff
- Financial officer / accounting director
- Other accounting staff
- Program director
- Other program staff
- Outside consultant
- Other volunteer or alumnus/a