



Chai Match 5 Overview

June 19, 2018

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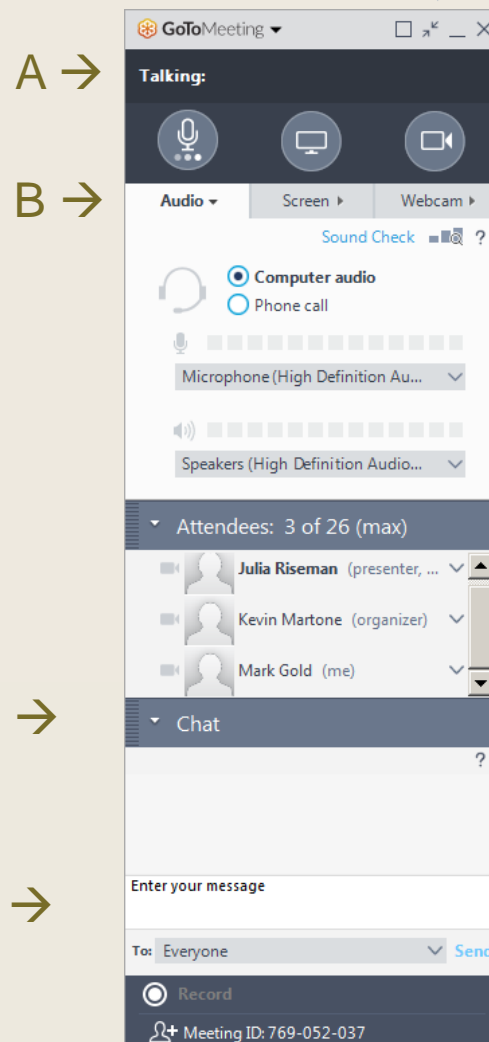
GoTo Meeting Logistics:

A) Grab Tab – Click red arrow to open/close Control Panel. Click square to toggle Viewer Window between full screen/window mode. Click mic icon to mute/unmute your audio. Click hand icon to raise your hand.

B) Audio Pane – Select audio format. Click Audio Setup to verify Speakers & Microphone.

C) Questions Pane – Attendees can submit questions and review answers.

D) Type your question and click Send to submit it to the organizer.



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Agenda:



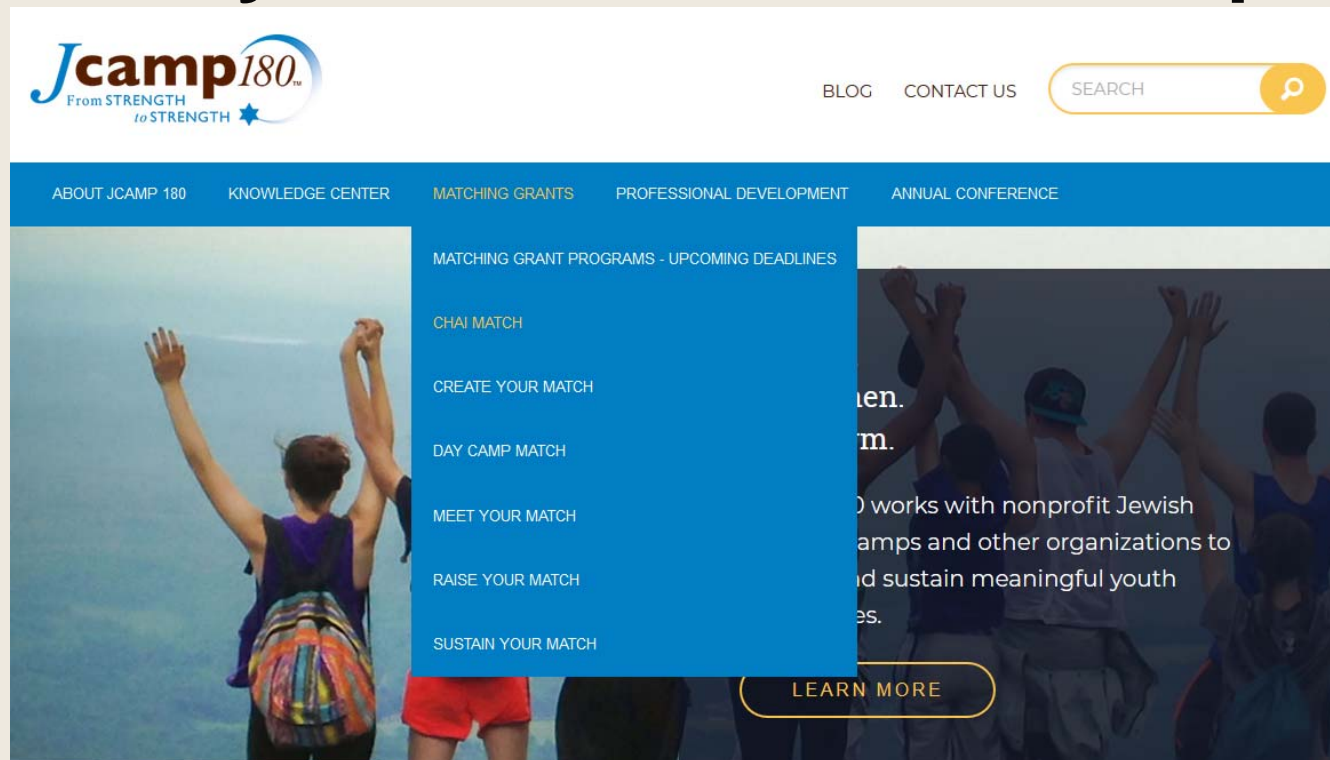
- Explain the ***Chai Match 5*** program and requirements in greater detail
- Provide training on the ***Chai Match 5*** online grants administration system (including forms to be submitted)
- Questions and discussion

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Follow-up:



Find today's information on JCamp180.org



Our website also contains the Chai Match 5 documents shown in this webinar

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Some past participants consider the Chai match program to be involved, convoluted or rigorous. Our goal today is to eliminate those concerns.

Program overview:



***Chai Match 5* is a TWO PHASE program**

- **Phase 1: Create a matching fund pool**
 - 50% of funds you raise
 - 50% of funds from JCamp 180
- **Phase 2: Solicit gifts to draw against that pool**

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Program Overview Phase I Gifts:



Your Major
Donor(s)

Grinspoon
Match

Identify and solicit major donors to partner with HGF
Gifts must be \$9,000 or larger

Six months to get pledges (or payments)
12 months to get payments on these pledges

Goal depends on Chai Match grant level. Either:
\$18,000 (one or two gifts)
\$36,000 (one to four gifts)
or \$54,000 (one to six gifts)

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Program Overview Phase I Gifts:



Your Major
Donor(s)

Grinspoon
Match

**Identify and solicit major donors to partner with HGF
Gifts must be \$9,000 or larger**

**Six months to get pledges (or payments)
12 months to get payments on these pledges**

**Goal depends on Chai Match grant level. Either:
\$18,000 (one or two gifts)
\$36,000 (one to four gifts)
or \$54,000 (one to six gifts)**

HGF Matches these gifts 1:1

Total phase 1 pool becomes \$36K, \$72K, or \$108K

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Program Overview Phase I Gifts:



Your Major
Donor(s)

Grinspoon
Match

- Pledges must be dated **AFTER 6/17/2018**
- Pledges must be dated **BEFORE 12/19/2018**
- Pledges must be paid in full **BEFORE 6/19/2019**
- Proof of pledges must be submitted **BEFORE 7/18/2019**

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Program Overview Phase I Gifts:



Your Major
Donor(s)

Grinspoon
Match

- Phase 1 pledges must be paid to the minimum level of \$9,000 before the JCamp 180 matching contribution is funded
- We pay on proof of payment, not on proof of pledge
- Plan for unpaid pledges

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Program Overview Phase I Gifts:



Your Major
Donor(s)

Grinspoon
Match

- If a Phase 1 pledge is not paid due to unforeseen circumstances, you cannot go back and replace a Phase 1 pledge after December 18, 2018.
- You should consider submitting more than the Phase 1 goal in fulfillment of phase 1 pledges.
- JCamp 180 will allocate “excess” Phase 1 pledge payments to phase 2 to maximize your program qualification.

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Program Overview Phase I Gifts:



**Your Major
Donor(s)**

**Grinspoon
Match**

- A phase 1 pledge document form document must be submitted for each gift by January 18, 2019
- Include the completed participant information form the FIRST time you submit a Phase 1 pledge document form.
- Periodically, submit a Chai Match 5 payment reporting form with phase 1 pledge payments
- All phase 1 payment verification documentation must be submitted to JCamp 180 by July 18, 2019

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Program Overview Phase I Gifts:



EXAMPLE

Your Major
Donor(s)

Grinspoon
Match

- Phase 1 pledge made in the amount of \$60,000
- Payment schedule of \$5,000 per month for 12 months
- JCamp 180 reserves \$54,000 (triple Chai) at the time the pledge is communicated to us
- After the 2nd payment (total is now \$10,000 which is greater than the phase 1 gift minimum level of \$9,000) JCamp 180 allots \$10,000 to the Phase 1 match pool.
- Upon each subsequent payment of \$5,000, JCamp 180 adds \$5,000 to the Phase 1 match pool to the maximum of \$54,000
- If no payments are received other than the first \$5,000 payment, no JCamp 180 funds are available.
- If payments are delayed or deferred so only \$25,000 is received by May 18, 2019, JCamp 180 matching funds are limited to \$25,000
- Payments in excess of the original pledge will not be matched by JCamp 180 funds.

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Time Table:



Phase 1 Timetable	
Phase 1 begins	June 18, 2018
Phase 1 pledge period ends	December 18, 2018
Phase 1 pledge reporting due	January 18, 2019
Phase 1 ends, all payments due	June 18, 2019
Phase 1 payment support submissions due	July 18, 2019

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Program Overview Phase 2 Gifts:



Your Major
Donor(s)

Grinspoon
Match

Phase 2
gifts from
Camp
community

- Identify and solicit gifts from your camp community
- Gifts must be \$1,800 or larger
- One year to solicit pledges or payments
- Three years to pay pledges

Goal depends on Chai Match grant level. Either:

- \$108,000 (one or two gifts)
- \$216,000 (one to four gifts)
- \$324,000 (one to six gifts)

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Program Overview Phase 2 Gifts:



Your Major
Donor(s)

Grinspoon
Match

Phase 2
gifts from
Camp
community

- Identify and solicit gifts from your camp community
- Gifts must be \$1,800 or larger
- One year to solicit pledges or payments
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Goal depends on Chai Match grant level. Either:
\$108,000 (one or two gifts)
\$216,000 (one to four gifts)
\$324,000 (one to six gifts)

The phase 1 pool matches these gifts 1:3
HGF Matches these gifts 1:6

Total campaign becomes **\$144K, \$288K, or \$432K**

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Program Overview Phase 2 Gifts:



Your Major
Donor(s)

Grinspoon
Match

Phase 2
gifts from
Camp
community

- Phase 2 challenges the \$500 annual donor to stretch their gift to \$600 and sustain that for 3 years
- Identify pledges to HGF within 30 days of receipt
- Pledges must be signed after June 18, 2018 and before June 18, 2019
- Pledges must be paid in full by June 18, 2021
- HGF share of pool is paid out when pledges are paid to the minimum level of \$1,800

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Program Overview Phase 2 Gifts:



Your Major
Donor(s)

Grinspoon
Match

Phase 2
gifts from
Camp
community

- A Phase 2 pledge document form document must be submitted within 30 days of the pledge.
- All phase 2 payment support must be submitted to JCamp 180 no later than 30 days following the 6/18/21 deadline.
- Phase 2 pledges must be paid to the minimum level of \$1,800 before we release JCamp180 matching funds
- Periodically, submit a *Chai Match 5* payment reporting form that shows Phase 2 pledge payments received since the prior report.
- We pay on proof of payment, not on proof of pledge

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Program Overview Phase 2 Gifts:



Your Major
Donor(s)

Grinspoon
Match

Phase 2
gifts from
Camp
community

- Although you have until 7/18/2019 to submit Phase 2 pledge information, and two additional years to submit proof of payment, we encourage you to submit documentation in a timely manner. JCamp180 makes quarterly payments against matching grant commitments.

Plan for Unpaid Pledges

- If a Phase 2 pledge is not paid due to unforeseen circumstances, you cannot go back and replace a Phase 2 pledges after June 18, 2019.
- You should consider submitting pledges for more than the Phase 2 goal.

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Program Overview Phase 2 Gifts:



Your Major
Donor(s)

Grinspoon
Match

Phase 2
gifts from
Camp
community

- Phase 2 pledge is made in the amount of \$6,000
 - Payment schedule set up as:
 - \$1,500 during 2018
 - \$1,500 during 2019
 - \$1,500 during 2020
 - \$1,500 before 6/18/21
- JCamp180 reserves its Phase 2 match share of the phase 1 match (\$1,000) when the pledge is submitted
- JCamp180 payments from the matching pool are released when the sum of the Phase 2 payments reported to us for this pledge meets or exceeds \$1,800

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Program Overview Phase 2 Gifts:



Your Major
Donor(s)

Grinspoon
Match

Phase 2
gifts from
Camp
community

- After the 1st payment the minimum Phase 2 gift level of \$1,800 has not been met. No matching funds are released.
- After the 2nd payment (\$1,500), the total paid is \$3,000. At that time, JCamp 180 releases its share of the 1:3 match or \$500. The camp already has its share of the matching pool funds.
- After the 3rd payment of \$1,500 JCamp 180 releases another \$250 and
- After 4th \$1,500 payment JCamp 180 releases the final \$250

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Program Overview Phase 2 Gifts:



Your Major
Donor(s)

Grinspoon
Match

Phase 2
gifts from
Camp
community

- If no payments are received other than the first \$1,500 payment, no JCamp180 funds are released.
- If the sum of the payments for a Phase 2 pledge never exceed \$1,800, there are no JCamp180 funds released.
- If payments against this pledge EXCEED \$6,000 JCamp180 does not reserve, fund, or release dollars greater than the \$1,000 originally reserved to be paid against this pledge.

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Time Table:



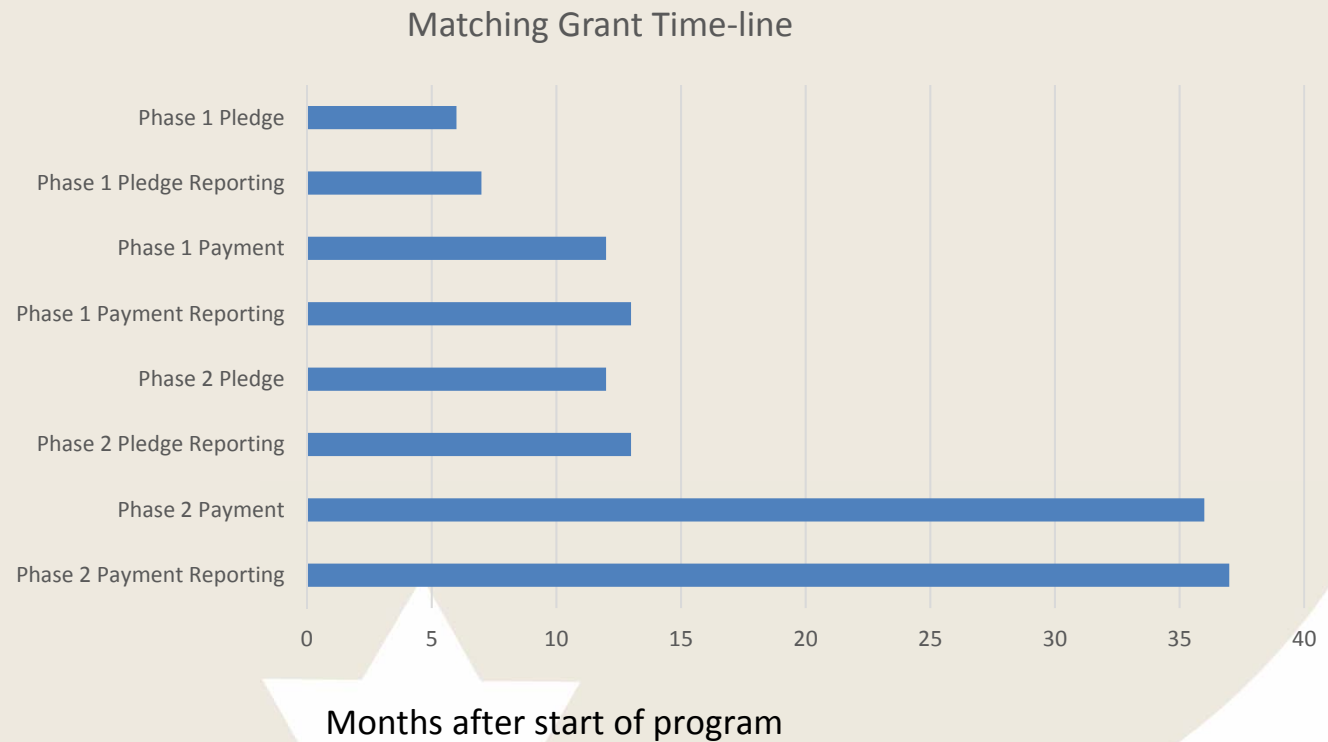
Phase 2 Timetable	
Phase 2 begins	June 18, 2018
Phase 2 pledge period ends	June 18, 2019
Phase 2 pledge reporting due	July 18, 2019
Phase 2 ends, all payments due	June 18, 2021
Phase 2 payment support submissions due	July 18, 2021

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Program overview:



***Chai Match 5* is a TWO PHASE program**



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Program Overview Phase 2 Example:



\$18,000

\$18,000

\$108,000

Single Chai Match

Campaign Total: \$144,000

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Program Overview Phase 2 Example:



\$36,000

\$216,000

Double Chi Match

\$36,000

Campaign Total: \$288,000



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Program Overview Phase 2 Example:



\$54,000

\$324,000

\$54,000

Triple Chi Match

Campaign Total: \$432,000

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Chai Match 5 Campaign Restrictions:



Half

Camps **must use** at least half of the *Chai Match 5* funds provided by JCamp 180 for:

- Capital improvements or
- Facility enhancements

Half

The remaining (up to) 50% is **unrestricted** and may be used for:

- scholarships
- endowments, or
- annual operating expenses

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Chai Match 5 Campaign Restrictions:



- Gifts in both phases may come from new or previous donors and from individuals, families (spouse, parents, siblings, and children), foundations or corporations.
- Family Foundation gifts through a Federation are allowed
- Excluded are gifts from a Jewish Federation or the Foundation for Jewish Camp.

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How does JCamp 180 fund Grants?



- Funds are RESERVED based on pledges that meet the program requirements
- Dollars are FUNDED
 - To the Phase 1 pool based on payments of Phase 1 pledges that meet the minimum required gift level of \$9,000 and
 - to the Phase 2 pool based on payments of Phase 2 pledges that meet the minimum required gift level of \$1,800
- Dollars are RELEASED based on Phase 2 payments of \$1,800 or more

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Proof of Payment

- Camps must upload proof of each payment.

A Proof of Payment is:

- A copy of the check before it is deposited
(feel free to redact check routing numbers)
- A copy of your credit card receipt or statement
- A copy of a bank EFT transfer documentation
- Others support as appropriate that includes:
 - Name of payee (camp) and donor
 - Amount of the gift
 - Date of the gift

Grant Administration:



- We recommend you submit your documentation quarterly. Waiting until the end of the year makes this a VERY time consuming job for you and us.
- Please make note of these reporting deadlines for submitting proof of pledge payments:
Feb 28 for payment in Mar May 31 for payment in June
Aug 31 for payment in Sept Nov 30 for payment in Dec

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Grant Administration:



- All gifts must be in cash or cash equivalent
 - Cash or stocks
 - Land, art, other property, in-kind contributions are not eligible for matching funds
- JCamp180 does not match contributions in excess of submitted pledges.

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For our Canadian Participants



- All payments by JCamp180 are in US Dollars
- Program dollar minimums and maximums are the same in Canadian dollars as USA dollars
 - Canadian \$9,000 is Phase 1 minimum, Canadian \$1,800 is Phase 2 minimum
 - Single Chai is \$18,000 Canadian, double Chai is \$36,000 Canadian and triple Chai is \$54,000 Canadian
- Pledges should be communicated to us in the currency in which they are made
- Payments from JCamp180 are limited to the US dollar maximum

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Grant Administration:



- All JCamp180 grants are administered through our online system
- Each camp will have an account for our online portal to upload reports
- Our grants team is available to help you throughout the campaign

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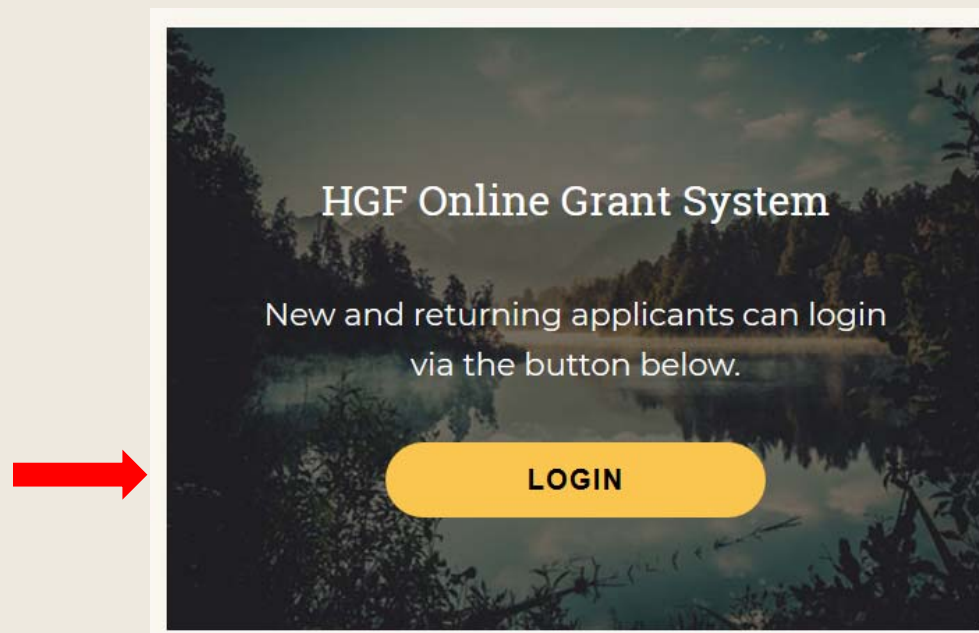
Overview

- You created an account for your camp when you applied for this grant
- How to submit pledges and payment support

Grant Administration:
How to submit pledges/payment support



To submit Chai Match 5 documentation, please log into the Online Grant System:



Scroll to the bottom of the JCamp 180 website home page:
www.jcamp180.org

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Grant Administration:

How to submit pledges/payment support



HAROLD GRINSPOON FOUNDATION



Contact Us

Please Sign In

Online Grant System

Welcome to the **Harold Grinspoon Foundation's Online Grant System.**

You may use this system to:

• Submit a new application or grant report

• Continue working on applications and reports previously started and saved

• View and reports previously submitted

• To create a new account in the Online Grant System, click the **"New Applicant"** button to create an account.

• If you are unable to log in or to access past applications without a login, please contact the **Grants Office** by calling 800-444-4444 or sending an e-mail to grants@hgf.org.

• If you have a login, enter it below.

Password

New Applicant?

Forgot Password?

Login

**Log in using the same email and password used to complete the Chai Match 5 application*

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Grant Administration:

How to submit pledges/payment support



*To submit pledges, select
"Reports"*

Applications **Reports**



Applications

My Applications

The "My Applications" page enables you to managed **current** and **previous** applications.

Use the **pull-down menu** on the right to access and review In-Progress or Submitted applications.

Show **In Progress Applications** ▼

☐ Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
------------------	---------------	-----------	----	--------------	---------	--------

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Grant Administration:

How to submit pledges/payment support



*Click on the Chai Match 5 link
to make a submission*

Last Log in: 2/2/2017 3:15 PM GMT-05:00

Applications Reports

Requirements

My Reports

Use this area to manage your reports.

Show New Requirements

☐ Hide Viewer Only Requirements

Form Name	Project Title	Type	ID	Due	Updated	My Role	Action
Chai Match Phase 1 Pledge Forms	Chai Match	Chai Match Phase 1 Pledge Forms	35073	09/18/2017		Owner	  

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Grant Administration: How to submit pledges/payment support



From there you will be brought to the first of three pages in which you will follow the step by step directions to upload and submit the documentation

[Contact Us](#) | [Exit](#)

1 Chai Match Phase 1 Pledges **2** Attachments **3** Review My Requirement

Chai Match Phase 1 Pledges

[Printer Friendly Version](#) | [E-mail Draft](#)

* Required before final submission

You may use this form to submit Chai Match phase 1 pledge forms and payment support. You will need to complete and upload the [Reporting Form](#) and **Pledge Support** for each pledge listed on the reporting form.

Pledges


As a reminder, each gift must be a minimum of \$9,000 from an individual donor
If deemed eligible, each gift will be matched 1:1 by the Harold Grinspoon Foundation to create a pool of matching funds per Single, Double or Triple Chai Level

Payment Support

Payment support may be:

1. A copy of a check
2. A copy of a credit card confirmation
3. A stock transfer confirmation
4. A wire transfer confirmation

If you have any questions contact our Grants Department at 413-276-0700 Ext 343 or grants@hgf.org or download the full guidelines [here](#).

[Save & Finish Later](#) [Next](#) 

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Grant Administration: How to submit pledges/payment support



HAROLD GRINSPOON FOUNDATION



*In Step 2 you upload
your attachments*

[Contact Us](#) | [Exit](#)

① Chai Match Phase 1 Pledges

② Attachments

③ Review My Requirement

Attachments

[Printer Friendly Version](#) | [E-mail Draft](#)

Chai Match Phase 1 Pledge Submission

A complete submission will include the [Reporting Form](#) and **Pledge & Payment Support (If the donor has paid)** for each pledge listed on the reporting form.

To Attach Files:

1. Select name of item you are attaching under the drop down labeled Title; Pledge Payment 1, and etc.
2. Click on Browse next to file name or click Select File for Safari users.
3. Once you have selected the corresponding file to the Title click Upload.

If done correctly an Uploaded Files table will appear at the top of the page. Repeat the steps until the all files have been uploaded.

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Upload

The maximum size for all attachments combined is 100 MB. Please note that files with certain extensions (such as ".exe", ".com", ".vbs", or ".bat") cannot be uploaded.

Title:

File Name: No file chosen

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Grant Administration:

How to submit pledges/payment support

The Reporting Form template can be found on the Chai Match 5 webpage on the JCamp180 website

Administration

The **Chai Match S** program is administered by the Harold Grinspoon Foundation grants administration team using an on-line system. All matching grant requests must be submitted through that online grant management system, which requires that participants register for this grant within the system. A unique link for this matching grant program will be available here when the program launches. Directions for use of this system will be communicated to all participating camps.

The grant management system acknowledges all submissions by e-mail. It is the responsibility of the submitter to assure that documentation has been received by JCamp 180. Pledge and gift payment information must be provided to JCamp 180 within 30 days of the end of the pledge / payment period.

Guidelines & Downloads

- **Chai Match 5 Application Template** (Note: This document is shared to help you prepare your application only. Applications must be submitted via the **online application form** only. You can find **detailed instructions for filling out the online application here**.)
- Chai Match 5 Brochure
- Chai Match 5 Phase 1 Pledge/GIFT Letter Template
- Chai Match 5 Phase 2 Pledge/GIFT Letter Template
- Chai Match 5 Phase 2 Pledge Document
- Chai Match 5 Payment Reporting Form

[illegible]

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Grant Administration: How to submit pledges/payment support



*After the Reporting Form has been uploaded,
upload the Pledge form*



[Contact Us](#) | [Exit](#)

1 Chai Match Phase 1 Pledges

2 Attachments

3 Review My Requirement

Attachments

[Printer Friendly Version](#) | [E-mail Draft](#)

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File Name: No file chosen

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Grant Administration: How to submit pledges/payment support

Jcamp180
From ST

Once you have
uploaded the
documents, they will
appear here

Attachments

Uploaded Files

Title	File Name	Uploaded	
Reporting Form	Chai-Match -Payment-Reporting-Form.xlsx	3/22/2017	13 KB
Pledge 1	Chai Match Phase 1 Pledge Forms.pdf	3/22/2017	11 KB
Total size of uploaded files			24 KB

Available

102,376 KB

Remove

Chai Match Phase 1 Pledge Submission

A complete submission will include the **Reporting Form** and **Pledge & Payment Support (If the donor has paid)** for each pledge listed on the reporting form.

To Attach Files:

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If you encounter issues or have any questions please contact our Grants D

Upload

The maximum size for all attachments combined is 100 MB. Please note th

aded.

Title: Pledge 1

File Name: Choose File No file chosen

Upload

To attach additional
payment support, select
Choose File, browse for
and upload the file

Save & Finish Later

Review & Submit

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Grant Administration: How to submit pledges/payment support



[Contact Us](#) | [Exit](#)

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Attachments

Printer Friendly Version | E-mail Draft

Uploaded Files

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Title: Pledge 1

File Name:

Choose File

 No file chosen

Upload

Save & Finish Later

Review & Submit

*Once you have uploaded
all of the documentation to
be submitted, please select
"Review & Submit"*

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Grant Administration: How to submit pledges/payment support



1 Chai Match Phase 1 Pledges 2 Attachments 3 Review My Requirement

Contact Us | Exit

You can review the information you've provided so far and make necessary modifications here. If you're satisfied with the contents of this report, click Submit. If you're not ready to submit your report yet, click Save & Finish Later.

Chai Match Phase 1 Pledges Printer Friendly Version | E-mail Draft

* Required before final submission

You may use this form to submit Chai Match phase 1 pledge forms and payment support. You will need to complete and upload the [Reporting Form](#) and [Pledge Support](#) for each pledge listed on the reporting form.

Pledges

As a reminder, each gift must be a minimum of \$9,000 from an individual donor
If deemed eligible, each gift will be matched 1:1 by the Harold Grinspoon Foundation to create a pool of matching funds per Single, Double or Triple Chai Level

Payment Support

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Attachments

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Pledge 1	Chai Match Phase 1 Pledge Forms.pdf	3/22/2017	11 KB
Total size of uploaded files			24 KB
Available			102,376 KB

Save & Finish Later Submit

*Step 3 ends on the final page,
where you will select "Submit"
to send the documentation to
the grants administration team
for review*

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Grant Administration:



For any questions regarding the
Online Grant System, please email
us at Grants@hgf.org

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Notifications



- We will send notification prior to each important deadline.
Notifications will:
 - be sent by e-mail
 - be sent to two people at each participating camp
 - be generic and not specific to your camp
 - will include a reminder of the upcoming deadline
- There will be only one reminder sent for each deadline
- Changes to your contact information can be updated through the online portal

***ON-TIME SUBMISSIONS ARE THE RESPONSIBILITY OF THE CAMP,
and should not be dependent on a JCAMP180 reminder***

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Questions:



Can a few major donors fulfill phase 1 and phase 2 and finish the whole campaign quickly?

Yes, but it isn't the intent of the grant. We are looking for camps who will use the campaign to reach out to more alumni and camp supporters and increase the base of philanthropic support for camp.

What do you mean by encouraging participants to plan for unpaid pledges? How will excess phase 1 payments be carried over to phase 2?

A triple Chai campaign example (\$54,000 goal):

If you solicit and receive four gifts of \$25,000, all four should be reported as Phase 1 gifts if they are intended to be paid by 6/18/19. If any are not paid in full within that time the additional pledges (with payments of at least \$9000) will assure that the Phase 1 pool from JCamp180 is maximized.

The payments in excess of \$54,000 and any phase 1 payments received after 6/18/19 but before 6/18/21 will be counted as phase 2 gifts.

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Legal Disclaimers



- This webinar is considered illustrative only. Although we have intended to fairly and accurately represent the **Chai Match 5** program, the full rules and requirements for the **Chai Match 5** matching grant program are outlined in the **Chai Match 5** matching grant program brochure available at www.jcamp180.org
- The Harold Grinspoon Foundation and JCamp180®, a program of the Harold Grinspoon Foundation, reserve the right to change the terms and conditions and/or terminate **Chai Match 5** at any time.
- Participating camps are responsible for meeting all requirements for documentation submission as outlined in this presentation and the **Chai Match 5** matching grant program brochure. This responsibility is for both submission dates and materials required to qualify for matching funds.

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Your Questions:



QUESTIONS?



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Chai Match 5



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