



August 8, 2019

Dear Summit Applicant,

Let me begin by thanking you for taking the time to consider applying to the ***Philanthropists' Summit on the Preventing and Combatting Anti-Semitism in America and Europe***. The Summit will be held in late 2019, or early 2020. Request for Proposals will be due on Friday September 13 at 5:00pm.

**In order to help you through the process, we are scheduling a number of information phone calls, each lasting an hour.** If you wish to learn more about the entire process please join us this Wednesday (Aug 7 from 9-10am), Thursday (Aug 8 from 9-10am), Friday (Aug 9 from 9-10am) Monday, (Aug 12 from 3:00-4:00pm), or Tuesday (Aug 13 from 3:00-4:00pm).

We encourage everyone participating in preparing the RFP to participate in one of the calls. Please email us of your intent to participate at [CEJP@optonline.net](mailto:CEJP@optonline.net) and we will provide you with the call information. Please bring the RFP enclosed below to the call. (Team members can participate in different calls.)

The Summit is based on Wall Street Venture Forums with the goal of showcasing 8-12 cutting edge programs; each presenter will have 15-17 minutes to present. ***The topic is Preventing and Combatting Anti-Semitism in America and Europe.*** The process will be thorough and rigorous.

**We are open to a wide variety of strategies and opportunities**, ultimately trying to find a balance between opportunities that require “seed,” and “mezzanine” funding, i.e. developing a new project, or taking an idea that has proven successful to a much larger scale.

In assessing the proposals, we will be looking to select programs that are attractive to **outcome driven philanthropists** who **are entrepreneurial** by nature. Ideally, the opportunity should meet at least one of the following criteria:

1. **Strategic models** that once proven can be scaled to impact significantly larger audiences:
2. **Opportunities leveraged** through their impact on the larger community and eco-system;
3. **Provides a critical resource** that no one organization can provide on its own, but impacts everyone;



4. **Supports influentials and industry leaders** in their attempt to work collaboratively and implement cutting edge impactful approaches; and
5. **Creates and expands the use of new technologies** in a meaningful way.

The following criteria are critical to the selection process:

1. **Innovative and Strong leadership;**
2. **Concrete, measurable impact** (focused and clear goals);
3. **Well defined and effective strategies;**
4. **Realistic financial models-** summit projects tend to be in the range of \$150,000- \$600,000 with ideally 33% of the money provided by the organization and/ or their donors;
5. **The organization(s) really needs the money** and would be unable to run/ initiate the program without the investment;
6. **Accurate, detailed and easy to understand budgets;**
7. **A model that insures sustainability;** and
8. If possible, **leverage** which can be either financial or programmatic

Instructions for the application (enclosed below) are as follows. The presentation should be no longer than five pages, including everything:

1. Please fill out the **Organizational Profile** (page 1) whose aim is to provide a basic snapshot of your organization, project & contact information.
2. Prepare a **one-page summary about your organization** (page 2) with the latest budget (page 3).
3. Prepare a **one-page summary of the project** (page 4) as well as the proposed budget (page 5). Make sure you include both the expenses and revenues you will have prior to summit contributions. You may ask for multi-year funding but need to present the accompanying multi-year budget.



We strongly recommend you divide the organizational and project description into **4 specific sections**:

- a) **What is the need and/ or opportunity** the organization/ project is trying to address? (This will provide us with context.)
- b) **What are your goals?** (Be as concrete as possible, whenever possible use numbers, or ranges.)
- c) **Present your most important and impactful strategies** (there are two ways to do this; either summarize them in bullet points, or incorporate them into a descriptive paragraph or two, but please make sure that whatever you did it is specific and clear.)
- d) **What are the resources you need to accomplish your goals?** (This can be **anything**, including but not limited to additional staff, scholarships, consultants, travel funds and research.)

Please don't overreach. In each section, make no more than 3-4 points. Our best advice is that simplicity and clarity is a virtue. Finally, please space the presentation so that is easy to read.

Things will be clearer following the call, but please review the RFP beforehand and bring it to the call.

We look forward to working closely with you on this critical issue.

Sincerely,

Joseph Hyman  
President, CEJP  
[CEJP@optonline.net](mailto:CEJP@optonline.net)

On behalf of CEJP's board and professional team



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**A Philanthropists' Summit on**

***Preventing and Combatting Anti-Semitism in the United States and Europe***

**September 2019**

**Name of Organization:**

**Organizational Mission (no more than 2-3 lines)**

**Annual Organizational Budgets**

**2018:**

**2019:**

**Reserve:**

**Name of Project** accompanied by a brief 1-2-line description (no longer) total cost of the project and how much you need to raise?

**Presenter and their position**

**Contact Person, position and contact information**

**Website Address:**



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**What Need/ Opportunity does your organization address?**

**Please list the 2-3 most important Goals your organization seeks to accomplish?**

1.

2.

3.

**Please outline your organizations most important Strategies/ Programs?**

1.

2.

3.

4.



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**Organizational Budget**

**2018**

**2019**

**Expenses**

Staffing (itemized)

Technology

Communications

Travel

Other

**Total Expenses**

**Revenues**

Fdns/ Indiv.

Fees

Other

**Total Revenues**

**Need to raise**



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**Name of Project:**

**What Need/ Opportunity does this project address?**

**Please list the most important Goals for the project?**

1.

2.

3

-

**Please outline the Strategies & Programs that will enable you to meet the goals.**

1.

2.

3.

4.

**What Resources are needed (staffing, technology, training, communications & travel)?**



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Place Project Name Here (remove ours)

Year 1

Year 2

**Expenses**

Staffing (itemized)

Technology

Communications

Travel

Other

**Total Expenses**

**Revenues**

Fdns/ Indiv. (please list individual - you don't have to include the names if it's a problem)

Fees

Other

**Total Revenues**

\_\_\_\_\_

**Need to raise**



(The description of this project and budget should not exceed 2 pages. The total RFP should be absolutely no more than 5 pages, including everything.)