

This document outlines the grant agreement between you, the Peer-Led Retreat facilitator, and MemGlobal. Please read this grant agreement carefully and sign the acknowledgment form signifying that you agree to the terms of the grant.

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1. About the Peer-Led Retreat Program

i. Purpose/Vision: The Peer-Led Jewish Learning Retreat program is designed for you to create a space where significant and meaningful Jewish Learning will take place with experienced and knowledgeable Jewish educators. This is an opportunity for you to begin building the Jewish community of your dreams while developing the leadership skills gained during Retreatology.

ii: Co-Facilitators: All Peer-Led Retreat grant recipients are welcome to bring on a co-facilitator (maximum of 3 facilitators on any PLR) to work with during retreat planning. All co-facilitators must identify as Jewish and between the ages 22-35. Co-facilitators must be on all mentor meetings and comply with all policies outlined in the grant.

iii: Participant Requirements: All Peer-Led Retreats must have at least 12 Jewish participants, ages 22-32. 15 is the ideal size, but you are welcome to aim for a larger group. First time PLR facilitators will have a maximum of 25 participants. If you would like to include participants who are NOT Jewish 22-32 year olds, 75% of your overall Retreat participants must fall within our target demographic. All participants must be at least 21 years of age and be **in good health** in order to attend. People under 21 are not permitted to attend Peer-Led Retreats.

Anyone who you use part of your budget to pay does NOT count as a participant (ex: educator, logistics manager, photographer). You and your co-facilitator (if applicable) DO count as participants at your retreat.

iv. Location: Peer-Led Retreats should be held within the local region of the facilitator and the community being served and should therefore not require a flight to attend. Participants should not need to travel more than 3 hours to attend your retreat. **For Israeli facilitators: PLRs are not permitted in areas A, B, and C of the West Bank.**

* This Grant is awarded on an objective and nondiscriminatory basis

v. Partnerships: Unless otherwise stated in your Peer-Led Retreat Grant application, we assume that MemGlobal is the sole funder and sponsor of your Retreat. You are required to discuss with your mentor if you would like to partner with an organization in any capacity (including contributing funds, educators, or having any bearing on the content of your retreat). The goal of the Peer-Led Retreat program is to create new, immersive, pluralistic experiences. As such, we will not support the following:

- Retreats exclusively open to members of a particular organization (i.e. we will not support a professional development Retreat for the staff or lay leaders of another organization).
- Partnerships with organizations that seek to create a combative environment or whose core values and strategies include antagonizing Jewish communal institutions.
- Partnerships with organizations that conflict with any of MemGlobal's program policies.

vi. Jewish Content Policies: When your Retreat takes place over Shabbat, the MemGlobal Staff and your mentor are here to help you craft meaningful Shabbat rituals that align with your personal style and retreat topic. Retreats over Shabbat should include some form of Kabbalat Shabbat (Jewish Shabbat prayer, song, readings), Kiddush (special Shabbat prayer over wine) at Friday night dinner and Saturday lunch, and Havdalah (10-30 minute ceremony marking the end of Shabbat) on Saturday night.

Your Jewish educator must fit the following criteria:

- Formal Jewish education
- Experience teaching and facilitating Jewish topics related to the theme of the PLR
- A strong resume with credentials outlining their Jewish education (your mentor may ask you to send a copy of these over email)

Your Jewish educator must lead a minimum of 3 Jewish learning sessions in person at your Retreat that explicitly connect your Retreat topic to Judaism. These sessions must be rooted in some form traditional Jewish text (from Torah, Talmud, Jewish leaders & thinkers, etc.) Your mentor will review these 3 sessions with you to ensure they comply with the requirements of the grant. If your retreat does not include any ritual (because it does not take place over Shabbat or a holiday), your Jewish educator must lead at least four Jewish learning sessions.

vii. Program Content Policies: Consistent with our mission, MemGlobal maintains a strong commitment to a secure and vibrant global Jewish community. In accordance with these beliefs and our commitment to pluralism, no Retreat should:

- Endorse, promote, advocate or serve as a platform for antisemitism or other forms of bigotry including racism, sexism and homophobia, or any forms of extremism
- Seek to proselytize Jews away from Judaism
- Endorse, advocate or serve as a platform for physical harm to Israelis or deny Israel's right to exist as a secure, democratic Jewish state, including support for or participation in the BDS (Boycott, Divest, Sanction) movement.
- Seek to impose one particular political or religious agenda as the truth, or antagonize Jewish communal institutions.
- Endorse a particular candidate or political party.

viii. PLR Tikkun Olam: At your retreat there will be a service-learning component that connects to your retreat topic. Meaningful Tikkun Olam programs are achieved through the Jewish service learning Cycle.

- Jewish Service Learning or the Service Learning Cycle consists of the issue area, the Jewish lens, an action, and time for reflection.
- Tikkun Olam programs must include at least 2 components of the service-learning cycle.

Types of Tikkun Olam

- **Direct Service** - Directly meeting the material or spiritual needs of people and allowing them to live life with dignity by providing goods, services, or other resources. Direct service is done with, not for, the community.
- **Education** - Equipping individuals with background information about a particular cause or issue affecting society. To have a real impact, a group must understand the underlying causes and history of that topic
 - This can happen as a discussion during a Shabbat dinner, as a stand alone activity, through watching a movie, etc.
- ***Advocacy**- As long as it is not associated with nor promotes, endorses, or is connected to a specific political party or candidate(s) or goes against PLR Program Content Policies.

iv. Advertising/Branding: Grant recipients are required to acknowledge the support of MemGlobal in all publicly disseminated information regarding their Peer-Led Retreat, including, but not limited to: Facebook posts or stories, Facebook events, Eventbrite pages, flyers, Instagram posts or stories, other social media posts, the Peer-Led Retreat’s website, printed retreat materials (name tags, swag, handouts, etc.).

Online acknowledgment should include a prominent placement of the MemGlobal logo, along with the phrase “Sponsored by MemGlobal” and a link to www.retreatology.org. Printed acknowledgment should include the MemGlobal logo. If your retreat is co-sponsored by another organization, MemGlobal requires equivalent recognition in all public materials.

vi. Background Check (US citizens only): All Peer-Led Retreat Grant approvals are subject to the satisfactory completion of a Background Check. The Background Check, conducted by a third party, will report on past convictions of theft, embezzlement, and violent or sex-related crimes

If you break any of these policies, MemGlobal has the right to revoke your Peer-Led Retreat Grant. If your retreat is revoked for any reason you will be held financially responsible for any unapproved expenses.

3. Staff Support & Your Mentor

i. Your Mentor: Each Peer-Led Retreat will have an assigned mentor who will check in and support you as you plan your Retreat. We expect you to meet with your mentor at least 4 times before your Retreat and once after to debrief. Your mentor is available to answer questions, be your thought partner & coach, and act as a link between you and MemGlobal. The content of these meetings is outlined in the Planning Guide. Your mentor does not need to attend your Retreat, but you can definitely invite them!

Your mentor should be kept aware of all major changes to your Retreat and must approve your location, budget, and Jewish educator before moving forward in the planning process.

ii. Staff Support: YOU ARE NOT ALONE. The MemGlobal team is thrilled to be here as a resource as you plan your Retreat. To whatever extent we can help you, please let us know!

iii. Crisis Communication Plan: In an effort to continue supporting and empowering those we work with, MemGlobal has created a “crisis communication plan”. For an emergency situation, when the safety of you or a participant is threatened, or a legal line has been crossed, call 911. For other situations in which there is a non-emergency crisis situation, please call our toll-free emergency line: (866) 610-3533. If no one answers, leave a detailed message with the nature of the situation and a contact number where you can be reached. You will quickly receive a call back from someone in the organization who will give you further instructions.

4. Financials

Read through these policies carefully before you begin purchasing items for your Retreat and paying educators. Re-read these policies before you submit your final report. Retreat facilitators are expected to keep a detailed account of all money spent.

i. Contractor Relationship: Peer-Led Retreat facilitators are considered contractors by MemGlobal. As such, MemGlobal will advance up to 75% of the PLR grant to cover approved budgeted expenses submitted with your application. Upon completion, the grant recipient will need to supply final reporting and actual expenses to receive the remaining grant funds.

US citizens: The facilitator honorarium is income per the Internal Revenue Service (IRS). MemGlobal will issue a Form 1099-MISC to you for the year in which you receive these funds. Please consult your tax professional to figure out how to properly report these payments so only your honorarium gets taxed as income. You will be asked to fill out form **W-9** (a tax form for independent contractors) in order to receive your honorarium.

Citizens of all other countries: Payments from MemGlobal may be perceived as income in your country of origin. Please work with a tax professional to figure out how to properly report these payments so only your honorarium gets taxed as income. You will be required to fill out form **W-8 BEN** in order to establish your status as a non-U.S. citizen who does not need to pay taxes in the U.S.

ii. Budget: You may request either \$4500 or \$6000 for your retreat, depending on the country your retreat takes place in, this amount will cover all retreat related costs including your honorarium. PLR Facilitators will be sent only the amount requested in the approved budget. Your PLR grant will be split, 75% will be sent at the time of your budget approval and the final 25% will be sent once all final reporting is completed.

If you are a MemGlobal resident, you may NOT use part of your House's programming budget to supplement Retreat funds.

If you do not use the full amount for your gathering you will be required to return any unused grant funds to MemGlobal.

Should grant funds be used in any way not following the grant application, all or a portion may be considered additional income to the facilitator.

iii Honorarium: Each retreat facilitator may receive an honorarium as a token of appreciation for the time and hard work you invest in planning and facilitating your Retreat. This money must be factored into your grant budget and will be sent to you upon completion of your Retreat and the post-Retreat requirements. We appreciate the time, energy, and passion you're putting in to make these so successful! Honorariums will vary based on which country you live in. Please note: You do not have to take the honorarium if you would like to use that amount toward your overall Retreat budget.

i Participation Fees: Any fees or donations made toward your retreat are to strictly be used toward your retreat budget. You can charge a participation fee to help create buy-in from participants. All participation fees collected must be reported to MemGlobal with the final budget. Any participation fee over \$100.00 must be approved by your mentor. MemGlobal cannot collect participation fees on your behalf.

Travel: Peer-led Retreats are designed to serve local communities, Retreat budget funds cannot be allocated to airfare for participant/facilitator travel (with the exception of flying in an educator), unless approved during the application process.

i Photo/Video: You *must* designate a photographer for your Retreat. We understand that taking photos may be a distraction at times, and you are not required to take photos on Shabbat. However, you must submit at least **25 high resolution photos** of the Retreat in your **Final Report!** There must be at least **1 group photo** that shows the number of participants you are reporting. The others should be a combination of posed and candid photos.

ii Alcohol & Substance Use: Retreat facilitators may allocate up to \$10/participant toward the purchase of alcohol for the Retreat. These purchases may include beer or wine, but not hard liquor. Retreat facilitators have the power to set the tone of their Retreats as far as alcohol consumption goes, but must commit to following the laws and regulations of the city and state their Retreat is taking place in, including open container laws and drinking age laws. Under no circumstances can a Retreat facilitator be under the influence of any illegal drugs during a Peer-Led Retreat. Consumption, distribution and promotion of illegal substances is strictly prohibited during any MemGlobal program.

iii MemGlobal reserves the right to audit your reported retreat expenses. All receipts will be required to show the information listed below and you will be responsible for maintaining those receipts.

Your receipts must contain all of the following:

- *Business/vendor name*
- *Date*
- *Item(s) purchased or service received and price of each item*
- *Total amount of bill*
- *Proof of payment - Proof of purchase shows the method of payment as well as the account information (credit card shows last 4 digits, etc.). If the account is not shown, we require a statement showing the account number and the charge.*

Per MemGlobal policies, all reports must be submitted within 14 days of the last day of your Retreat in order to receive your final PLR grant funds, including your honorarium. Once your reports are submitted, MemGlobal staff will compare the claimed expenses to your approved budget.

If final reporting requirements are not completed all grant funds sent will be reported as taxable income and future PLR grants will not be provided.

Please note: Sending international wires may incur bank fees. It is your responsibility to ask your bank what that amount is and include it in any request for funds. Once we have sent out final grant funds we will not cover any bank fees that had not been communicated beforehand. Bank fees will not count against your overall budget.

You can be held personally liable for costs incurred without approval from your mentor (e.g. if you pay a deposit on a venue that your mentor finds unfit for hosting your Retreat).

5. Pre & Post-Retreat Checklists

i. Before Your Retreat:

1. Meet with mentor 4 times. Details of these meetings can be found in the Planning Guide.
2. Have your budget and location approved by your mentor through the Submission Center.
3. Have your educator approved by PLR Team, through the Submission Center.
4. Preview the Peer-Led Retreat Final Report questions.

ii. After Your Retreat: Please complete the following within 2 weeks of the end of your Retreat.

1. Evaluation - Please complete the Peer-Led Retreat Facilitator survey. (This survey is for you! It is optional to send a survey to your Retreat participants.)
2. Submit your final report (Including photos, final budget, participant list, etc.)
3. Meet with your mentor 1 time to reflect and conclude the experience.

Does my Retreat need to take place over Shabbat? No, but you will need to explain the logic behind your dates in your application.

Does the food on my Retreat need to be Kosher? No. MemGlobal understands that different communities will have different relationships to Judaism and engage in different levels of Jewish practice. We do ask that during MemGlobal Retreats, hosts do not engage in blatantly non-kosher practices (i.e. serving pork or shrimp at a barbeque). We recommend checking in with your potential participants to make sure you have enough variety in your menu to provide for everyone's needs.

Does my Retreat need to take place at a 'Retreat center'? It can, but it doesn't have to. Your Retreat could take place in a rented house, a campground, a hotel, or any number of venues, provided that you work out your budget and logistics accordingly.

I am a MemGlobal resident. Does my Retreat count toward my House's monthly program count? If at least 2 residents are actively working on the retreat, and it is open and marketed to the entirety of your MemGlobal's community, then it can count as one of your house's monthly programs. Houses are not permitted to supplement the Peer-Led Retreat Grant with their house's monthly program budget or other house-only grants, but we are glad to encourage this kind of cross-program engagement. This must be approved by your Regional Manager.

How do responsibilities for each Retreat host break down? This will be up to you. We strongly recommend having one person in a pair responsible for facilitation/content design (facilitator), and the other person responsible for logistics (Retreat manager).

How do I submit my receipts for review if an audit is performed? Your receipts will be submitted with your final report directly to the PLR team along with any requested background information.

What if I realize that facilitating a Peer-Led Retreat is going to be too big of a time commitment at this point in my life? What if I get overwhelmed and want to give up? If you feel overwhelmed, first and foremost, please reach out to your mentor for guidance. You may also want to consider recruiting a friend or colleague to help you plan and facilitate this Retreat. If you need to un-accept your Peer-Led Retreat Grant, we expect you to return unspent money that MemGlobal has fronted you.

Do I need to run each budget item by you as I purchase it? We recognize that prices can change and vary, and you do not need to contact us each time you make a purchase once your budget is approved. Your approved budget should serve as your guideline, and you are required to stay within it (we cannot offer any additional funding over the amount awarded).

Will MemGlobal contact my retreat participants? MemGlobal will only contact your participants once to send them a follow-up survey after your retreat. The survey is very important to demonstrate the impact of your gathering and fundraise for the Peer-Led Retreats program.

How long after Retreatology do I have to host a Peer-Led Retreat? You have up to 5 years from the time you attend Retreatology to run your Peer-Led Retreat(s). You will not be approved for a Peer-Led Retreat Grant once you have reached 36 years old.

What if there are missing items and/or damages to the venue or rentals used during my retreat? All facilitators are responsible for any costs incurred from missing items or damages caused to any property used during your Peer-Led Retreat.

What do I do if I feel ill the week my retreat is supposed to take place? In an effort to reduce the spread of disease as much as possible, any Peer-Led Retreat facilitator or participant who feels ill may not attend. Get in touch with your mentor as soon as possible to discuss your options (including: postponing the retreat, having your co-facilitator take over, Zooming into sessions, etc.).

If any *major* costs/actuals change from your original submitted budget, it is your responsibility to inform you mentor as soon as possible.

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If you have other questions or if there is anything else we can provide that will help you, feel free to contact us! Again, congratulations - we can't wait to see your Retreat come to life!

***Please sign the Peer-Led Retreat Grant Policy Acknowledgment Form when you have read through all instructions in the handbook. You must sign the form before moving forward with the planning of your Retreat.**

**All qualified applicants will be considered for the PLR Grant. MemGlobal is an equal opportunity organization and will not allow discrimination based upon age, ethnicity, ancestry, gender, national origin, disability, race, size, religion, sexual orientation, socioeconomic background, or any other status prohibited by applicable law.*

Date:_____

Name:_____

Signature:_____