

Ottawa Jewish Community Foundation

2013 BUSINESS PLAN



OTTAWA JEWISH
COMMUNITY FOUNDATION

OJCF MISSION

The Ottawa Jewish Community Foundation provides donors the vehicle to contribute to the long term financial stability and support of the needs of the agencies which serve the Ottawa Jewish Community. The Foundation acts as a steward for these gifts and links the past, the present and the future while building trust with everyone we serve.

Adopted November 23, 2006

Executive Summary

Founded in 1971, far-sighted community members Bernard Shinder, Gilbert Greenberg and the Vaad Ha'Ir (now known as the Jewish Federation of Ottawa) Executive Director Hy Hochberg saw the need for a financial resource to maintain the community's fiscal structure and safeguard its future. This new organization would also be a means to perpetuate the name of a person or a family and link it to the community forever.

First known as the Ottawa Jewish Community Endowment and Bequest Foundation, its name was changed in 1982 to the Ottawa Jewish Community Foundation (OJCF). The Ottawa Jewish Community Foundation (OJCF) is a unique community organization, acting as the sole foundation possessing the ability to positively impact and influence the growth and development of the overall Ottawa Jewish community.

OJCF BUSINESS PLAN

The long-term goal of the Ottawa Jewish Community Foundation focuses on the need to ensure that there will always be sufficient financial support for the continued development of a strong and vibrant Jewish community.

Flowing from the OJCF's first 5-Year Strategic Planning document in 2008, the drafting of an annual business plan has enabled us better accomplish the work we have set out to do in partnership with our community's philanthropically minded donors. Most importantly, the Annual Business Plan allows the Foundation to actively develop strategies, programs and events to achieve our goals and increase our reach and connection.

OJCF IN 2013

Most of the activities which the Foundation will specifically focus on in 2013 will be programs and objectives that have been started in previous years. These ideas strongly resonate with the Foundation leadership and members, and the work that has begun developing them continues forward with positive and increasing results. Emphasizing these programs as we move into a new year will surely help us further enhance the reach and scope of the Foundation, working with donors to support their personal philanthropic goals.

Fundraising, marketing and elevating the education and development of our Board and committees remain the 3 priority areas of the Foundation's 2013 Business Plan. All three areas play an important role in developing the various projects undertaken by the Foundation, and the various committees that oversee each component are working together in an increasingly supportive manner.

Moving forward, the Foundation continues to address and focus on specific ideas to improve and enhance philanthropy in our community, including:

- Enhancing estate and legacy giving by working with a variety of demographic populations and institutions to help sustain our community for generations to come
- Promoting Women's philanthropy, which recognizes the increasing capacity of women to give, and to help nurture a systemic difference in the status of women and children in Ottawa
- Increasing collaborative fundraising with the Jewish Federation of Ottawa to enhance our community's donors' philanthropic undertakings
- Increase the visibility and marketing efforts of the Foundation to engage current and potential future donors

Continuing these and other efforts in the coming year will help brand the Ottawa Jewish Community Foundation as the leading planned-giving arm of our community, helping grow our assets with new funds along with increasing the contributions to existing funds.

FUNDRAISING

Fundraising is a core tenet of the Foundation's activities. Targeted and thoughtful fundraising offers multiple ways to connect to both current and potential donors. Successful fundraising will result in an increase in financial support for our community's programs and agencies. Not all donors engage with our organization in the same way, and we will need to utilize multiple channels and efforts to effectively reach our community members.

The following committees, initiatives and programs are designed to help us achieve these goals:

- **FUNDRAISING COMMITTEE**

- Promote and advance OJCF fundraising projects, activities, and ideas and engage in follow up strategies with potential donors
- Promote the various ways by which donors can create and/or feed existing funds, focusing on cutting-edge tax relief mechanisms
- Build upon the notion of meaningful philanthropy, ensuring donors are able to connect their philanthropic goals to projects that have personal and emotional resonance
- Work with the marketing committee to help elevate OJCF brand-recognition to the community at large
- Develop a personalized contact / follow-up strategy designed to engage current and potential OJCF donors
- Expand and develop the Power Breakfast brand and outreach capability
- Develop and promote educational materials explaining the variety of OJCF giving vehicles
- Create a Professional Advisory Committee (focused on legacy giving experts) to help promote legacy giving and preparedness
- Educate professional advisors about OJCF as a philanthropic option for relevant families
- Create a "Legacy Giving Kit" for easy distribution to any/all interested donors
- Develop strategies for niche markets / donor groups (LOJE, retirees, etc.)
- Plan and hold parlor-type meetings to cultivate, involve, educate and canvass various niche-markets and groups
- Further expand and promote active volunteer involvement in approaching prospective and new donors

- **WOMEN'S COLLECTIVE PHILANTHROPY PROGRAM (WCPP)**

- Increase awareness of and involvement in WCPP's Collective Endowment Fund (WCEF)- a pooled fund that can address and provide support for women and children-specific causes
- Elevate giving to the WCEF and raise its profile in the wider community
- Promote the overall of concept of women's philanthropy through the tenets of engagement, education and empowerment

- Develop targeted philanthropy services and seminars, including relevant materials and special events (financial planning seminars, speakers)
- Initiate a successful WCEF grants system to help worthwhile initiatives that correspond to the Women's Collective Philanthropy Program
- **Collaborative Fundraising Model (CFM)**
 - Continue to refine and promote the CFM program in direct consultation with JFO and relevant committee structures (ex: Resource Development Committee; CFM Task Force, planning department, etc)
 - Facilitate further integration of the CFM process into the Jewish Federation of Ottawa (JFO) Annual Campaign, promoting CFM ideas to all appropriate canvassers and divisions
 - Recruit strategically appropriate volunteers from Annual Campaign canvasser list and offer CFM-directed education to be used as part of the Annual Campaign canvassing cycle
 - Refine materials to provide targeted education & training for the professional staff and volunteer Donor Relationship Managers (DRM) re: planned giving options, to personally engage prospective donors in conversations regarding possible increases in philanthropic giving
 - Actively solicit donor prospects identified as appropriate for the CFM, focusing on planned and supplemental giving opportunities
 - Develop CFM-focused giving opportunities and projects and create personalized plans to match donors to the appropriate / relevant projects
 - Create an intergenerational giving strategy for the Foundation and Federation, including:
 - Ensure appropriate giving options are developed for the emerging generation
 - Develop initiatives focusing on parents of next generation donors to secure gifts before the intergenerational transfer of wealth occurs
 - Access outside resources and actively participate in projects addressing strategies to engage next generation and family philanthropy (ex: 21/64 Foundation's Multigenerational Family Philanthropy forum)
 - Promote an increased Foundation presence at community events (ex: JFO Annual Campaign kick-off event, etc.)
 - Further expand and promote active volunteer involvement in approaching prospective and new donors
- **B'nai Tzedek**
 - Continue to enhance and develop the volunteer committee regarding B'nai Tzedek canvassing and engagement, ensuring all appropriate families are contacted in a timely fashion
 - Enhance Teen Philanthropy as a concept and practice beyond the bar or bat mitzvah-specific age
 - Partner (if and when possible) with appropriate community organizations re: promoting OJCF B'nai Tzedek funds (ex: Ottawa Jewish Community School, synagogues, etc.)

- Gather and share best practices and examples from similar teen-oriented programs in other communities and organizations (ex: Jewish Teen Funders Network)
- Hold appropriate events for the teens involved, engaging them in philanthropic education and community events (eg: Mitzvah Day)
- Engage teens, parents and/or committee members to speak at schools, synagogues, etc. for recruitment purposes of additional families and teens
- Recruit group of B'nai Tzedek ambassadors / teen chairs to work alongside the committee
- **Book of Life (BoL) / Create a Jewish Legacy (CJL)**
 - Refine strategies for inclusion of relevant & appropriate fund holders, donors, individuals who make a legacy pledge, etc. as potential signatories in the Book of Life, incorporating past BoL project participants into the new project
 - Finalize appropriate designs and formats for the Book of Life (ex: hard copy, digital format, etc.)
 - Plan and hold Book Of Life launch event within the calendar year
 - Continue the promotion, identification and solicitation of donors to take part in the OJCF Legacy Challenge, building up bequests gifts within the community
 - Work with the boards of local Jewish organizations, agencies and synagogues in advocating the CJL strategy and planned giving options
 - Create focused campaigns and materials to help meet the long-term financial planning needs of Ottawa's Jewish institutions and agencies
 - Explore outside sources to help promote Legacy Giving for individuals and organizations (ex: Harold Grinspoon Foundation, 21/64 Foundation, etc.)

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| MARKETING |
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In today's society, we are all constantly inundated with information. Therefore, a strong brand and image is critical to community awareness. With an effective and thoughtful marketing strategy, we can better promote the Foundation's mission, ideas, programs and services. Successful marketing will lead to increased community support for the Foundation.

The following committees, initiatives and programs are designed to help us achieve these goals:

- **OJCF BRANDING & DONOR COMMUNICATIONS**
 - Work with other OJCF committees and offer marketing expertise to help promote their activities
 - Create a marketing and outreach strategy to communicate with donors at various points

throughout the year

- Develop an annual and comprehensive plan for building on and improving OJCF's branding and visibility within the larger Jewish and general community
 - Develop appropriate tools to actively reach out and engage donors while showing appreciation for existing donors
 - Enhance the Tribute Card program with redesigned cards and enhanced donation / incentive programs and services
 - Enhance communications with other agencies / promote their work and impact in the community
 - Create directed marketing efforts using the OJCF website, newspaper ads, lawn signs, newsletters, etc.
 - Refine strategically sound year-end campaigns to engage donors who have not made any contributions to their funds during the year
 - Develop personalized e-communications plans to reach specifically segmented populations (ex: specialized e-blasts; targeted demographic- and affinity-specific e-newsletters)
- **OJCF WEBSITE**
 - Redesign website, exploring new features to further personalize the website for individual donors
 - Implement a robust data collection system with respect to donor information (including current email addresses) to facilitate faster and cost-effective communication options
 - Create strategies to enhance donors' online connections with OJCF (ex: online event sign-up, collection of email addresses, tribute cards and donations)
 - Explore mobile engagement strategies to capitalize on smart-phone and tablet technologies
 - Explore ways to engage community members, donors and multiple demographics via assorted online platforms (ex: online updates, surveys, etc.)

BOARD DEVELOPMENT & EDUCATION

Nonprofit organizations require strong and innovative leadership, especially during uncertain times. Board members of nonprofit organizations must effectively coordinate several key functions of governance, ranging from providing a broad vision for the organization's mission to defining specific metrics for measuring performance and effectiveness. Whether they are overseeing specific committees and associated goals or acting as ambassadors to the community-at-large on behalf of the Foundation, the OJCF Board members must feel prepared to effectively carry out a variety of tasks during their tenure.

The following committees, initiatives and programs are designed to help us achieve these goals:

- **BOARD DEVELOPMENT AND EDUCATION**

- Assist in the recruitment and retention of OJCF Board members
- Implement a variety of options for continuing board education (ex: speakers; conference call seminars; retreats/conferences)
- Develop and share a resource library of board education-related materials and tools (ex: articles; web-based presentations)
- Develop strategies to further enhance board meeting agendas and experiences
- Explore other organization's Board development programs for relevancy and usefulness

- **MENTORSHIP**

- Develop a strategic succession plan for board and committee
- Offer support and/or training for new committee chairs re: setting targets, developing annual strategies, etc.
- Annually revise OJCF Board orientation for new members

- **BOARD OF ADVISORS**

- Integrate past chairs as part of our fundraising team, focusing on legacy and bequest-based giving
- Coordinate bi-annual gatherings of past chairs / presidents for update and advice-gathering purposes

OJCF 2013 Business Plan Measurables & Deliverables

| | Action Item | Minimum deliverables |
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| FUNDRAISING TARGETS | Legacy Challenge Gifts | 15 |
| | Annual CFM active relationships | 15 |
| | CJL partnerships | 5 |
| | B'nai Tzedek gifts | 20 |
| | Face-to-face OJCF canvasses | 50 |
| | Money raised re: new gifts | \$500,000 |
| | Money raised re: deferred gifts | \$1,000,000 |
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| MARKETING & COMMUNICATIONS TARGETS | Newsletters | 2 |
| | Events | 3 |
| | Directed donor communiqués | 3 |
| | Parlor meetings | 3 |
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| BOARD EDUCATION TARGETS | Board-directed education seminars | 3 |
| | Disseminate Board education materials / articles | 6 |
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