

Ottawa Jewish Community Foundation 2019 Business Plan

Mission: The Ottawa Jewish Community Foundation provides donors the vehicles 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.



Vision Statement: As a trusted leader and the centre of Jewish philanthropic giving, the Foundation will engage, educate and inspire generations of donors, ensuring the long term security and financial viability of Ottawa's Jewish Community.

Guiding Principles

- **Determined Leadership:** the Foundation exercises innovative leadership, focused on respecting donor's rights, desires and aspirations.
- **Trusted Stewardship:** through professional financial management, the Foundation is committed to the responsible and transparent stewarding of all assets entrusted to us.
- **Jewish Values:** the Foundation's Jewish values of tikun olam, tzedakah, and dor l'dor, shape and direct our mission to strengthen the Ottawa Jewish Community. These values inspire us to work with all people in a collaborative, compassionate and respectful manner.
- **Commitment to Excellence:** the Foundation strives for excellence in all aspects of our work, which fosters trust with donors that we will meet their philanthropic goals.

INTRODUCTION

This is the first year of the Foundation's newly approved 5-year strategic plan. This plan is highlighted by celebrating the Foundation's 50th anniversary in 2021 and the expected participation in the *Life and Legacy Program* of the Harold Grinspoon Foundation (the "Program"), likely to begin in 2020 and last 4 years.

In 2019, priority will be given to appropriately setting both these significant endeavors up for success. This includes: a successful application to the Program, cultivating past leadership, positioning the Foundation brand, and operational improvements to support future enhanced fundraising.

FUNDRAISING

1. Successful application to the Harold Grinspoon Foundation's *Life and Legacy Program*, and secure a minimum of 10 partner organizations
2. Raise a minimum of \$325,000 in new dollars (e.g. endowments, tribute cards, etc.)
3. Secure a minimum of 4 new Legacy gifts, with a minimum estimated value of \$400,000
4. Minimum of 60 face-to-face meetings by professionals and volunteers
5. Maintain a minimum of 50 active prospects on the pipeline

GOVERNANCE

- 1) Minimum 85% engagement of board members in a facet of fundraising (e.g. solicitation, door opening, etc.).
- 2) Minimum 2 initiatives to engage past leadership to begin preparing for the Program and the 50th (e.g. special advisory board, communication, etc.)

- 3) Successful submission and approval of a 2019 business plan on continuous operational improvement. Over the course of the year, a minimum of 80% of identified targets will be met.

EDUCATION AND OUTREACH

- 1) Develop unique Foundation social media channels
- 2) Minimum one stewardship/outreach event (excluding joint top donor event with the Jewish Federation of Ottawa)
- 3) Minimum 5 donor touchpoints

CONCLUSION

While maintaining active fundraising, the Foundation will focus on strengthening its internal capacity to deliver even more stellar results in subsequent years. This is an exciting time for the Foundation - the 50th anniversary, the Program, and once in a lifetime wealth transfer events that are anticipated to occur.

The Foundation will strive to excel in its responsibility to secure significant financial resources to secure our community's future.
