

Ottawa Jewish Community Foundation

2020 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

2019 was successful with the vast majority of metrics having been achieved, including acceptance into the Harold Grinspoon's *Life and Legacy* initiative. In the strategic plan's second year, the primary focus will be on the initiative's successful launch and preparing for the Foundation's 50th anniversary celebration.

EDUCATION AND OUTREACH

Evaluation of 2019 metrics

1) Develop unique Foundation social media channels.

Achieved: Since March 2019, Foundation has had a dedicated Facebook page and twitter account and at the same time, continues to benefit from promotion on Federation's social media channels. Facebook followers are now at 362, with a regular reach of approximately 550 people. The Foundation's reach on twitter is minimal.

2) Minimum one stewardship/outreach event (excluding joint top donor event with the Jewish Federation of Ottawa).

Achieved: There were two capacity filled events: 1) with Shopify COO Harley Finkelstein on May 6; 2) Sisters on Board on October 24. Additionally, the AGM was well attended, with Bruce Linton, former CEO Canopy Growth as the keynote speaker.

3) Minimum 5 donor touchpoints.

Achieved: the Foundation maintains a year-round calendar of communication with donors – including the annual report, fund activity report, newsletter and communication re: events, promotions and initiatives.

2020 Goals

- Comprehensive promotion of *Life & Legacy*. Examples include: video, ads, social media, and newly created signage (minimum 4 avenues).
- Customized donor touchpoint based on fund designation (10 most frequent designations).

GOVERNANCE & OPERATIONS

Evaluation of 2019 metrics

- 1) **Minimum 85% engagement of board members in a facet of fundraising** (e.g. solicitation, door opening, etc.).

Partially achieved: 92% of board members have now taken on prospect(s) and/or joined a *Life & Legacy* team. However, not all have begun meeting with prospects yet.

- 2) **Minimum 2 initiatives to engage past leadership to begin preparing for *Life & Legacy* and the 50th anniversary** (e.g. special advisory board, communication, etc.).

Not achieved: Due to other priorities and the fact that these initiatives were not time-sensitive, this was deferred.

- 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.

Achieved: An operational improvements plan was approved in February 2019 and 89% of all targets were met.

2020 Goals

- Successful submission and approval of a 2020 continuous operational improvement plan. Over the course of the year, a minimum of 80% of initiatives are successfully implemented.
- Minimum 2 initiatives to engage past leadership with *Life & Legacy* initiative and the 2021 celebration of the Foundation's 50th.
- Participation in all *Life & Legacy* training sessions by a minimum of 80% of partner organizations.

FUNDRAISING

Evaluation of 2019 metrics

1. **Successful application to the Harold Grinspoon Foundation's *Life and Legacy Program*, and secure a minimum of 10 partner organizations.**

Achieved: The Foundation was accepted in August 2019 and 13 partner organizations have signed an MOU (a 14th is expected to sign).

2. **Raise a minimum of \$325,000 in new dollars** (e.g. endowments, tribute cards, etc.).

Achieved: With a late year surge, \$334,714 was raised, in addition to \$7.6M in 3rd party managed funds.

3. **Secure a minimum of 4 new Legacy gifts**, with a minimum estimated value of \$400,000.

Achieved: 5 new legacy commitments have been made, with a minimum estimated value of \$670,000.

4. **Minimum of 60 face-to-face meetings** by professionals and volunteers.

Achieved: 77 meeting took place - 49 donor meetings and 28 meetings with organizations (mostly around *Life & Legacy*).

5. **Maintain a minimum of 50 active prospects on the pipeline.**

Achieved: There are currently 51 prospects on the pipeline (excluding *Life & Legacy*).

2020 Goals

- Minimum 10/14 partner organizations meet or exceed their legacy targets (as per *Life & Legacy* metrics).
- Minimum 50 new legacy commitments (per person/household, not organizational), with a minimum estimated value of \$4M.
- Raise a minimum of \$250,000 in new dollars (e.g. endowments, tribute cards, etc.).
- Minimum 85 face-to-face meetings (including those done by partner organizations).

What does success look like? 2020 Key Deliverables

	Action Item	2020 Minimum Deliverable	2019 Actual
Fundraising	New \$ Contributed Into Foundation Tribute Cards, new funds, new \$ into existing funds, new 3 rd party managed funds, etc. Does not include CEC contributions or realized Legacy gifts	\$250,000	\$334,714
	New Legacy commitments	50 new commitments, minimum estimated value \$4M	5 new gifts, \$670,000 estimated value
	10/14 partner organizations meet or exceed legacy targets	80%	N/A
	Face to Face meetings	85	77 total 49 donors 28 organizations
Education and Outreach	Promotion of Life Legacy (4 initiatives)	+4	N/A
Governance	80%+ of operational improvements achieved	80%	89%