
Introduction

2020 was defined by the pandemic and how individuals and organizations responded to it. While it was not possible for the Foundation to implement all aspects of the 2020 Business Plan, much was still accomplished, particularly with respect to key fundraising metrics and *Life & Legacy*. Additionally, new initiatives were added such as bi-monthly communication with fund holders and a virtual speaker series.

Most importantly, in 2020, the Foundation's intrinsic value and leadership were clearly demonstrated. Particularly noteworthy was the Board's decision to maintain disbursements at 4%. This disbursement came at a time when needs were the greatest and the markets were at their lowest. It was the correct decision for the community.

It was not the year that any of us planned for, but it was one which the Foundation handled exceptionally well and to the benefit of Jewish Ottawa.

Management guru Michael Porter has said that "sound strategy starts with having the right goal." In 2021, the Foundation's goal and focus will be on a successful Year 2 of the Life & Legacy initiative (the Foundation's most significant fundraising effort since the Community Endowment Campaign) and celebration of the Foundation's 50th anniversary; while being nimble, thoughtful and ready to pivot on how best to achieve overall goals and best serve the community.

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

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 tikkun olam, tzedakah, and l'dor v'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.

2021 Objectives

Foundation's 50th Celebration and Fundraising

Please consult Appendix A for the complete plan of the celebration of the Foundation's 50th.

- Successful implementation of core promotional elements of the plan to celebrate the Foundation's 50th anniversary.
 - 50th promotional material (e.g. logo, new tribute cards)
 - Events (e.g. virtual speaker series and pandemic permitting, small cheque presentation events, AGM honouring past chairs)
 - 50th profile raising educational materials (e.g. podcast, impact report, monthly stories on social media)
- Successful implementation of fundraising promotional efforts (e.g. year-end direct mail, tribute card promotions), resulting in a minimum of \$600,000 raised.

Life and Legacy Initiative

- Minimum 10/14 partner organizations meet or exceed their legacy targets by March 1, 2022 (as per *Life & Legacy* metrics); resulting in 40 new commitments, minimum estimated value \$2.5M.
- Participation in all *Life & Legacy* training sessions by a minimum of 80% of partner organizations.

Foundation Operations

- Containing fewer items than past years, 100% success at implementing the initiatives in the 2021 continuous operational improvement plan.
- Review of current investment management model.
- Minimum of 7 annual touch points with donors and event participants.

2021 New Commitments Report – what does success look like?

Action Item	2021 Minimum Deliverable	2020 Actual	2020 Minimum Deliverable
<p>New \$ Contributed Into the Foundation Tribute Cards, new funds, new \$ into existing funds, new 3rd party managed funds, etc. Does not include CEC contributions or realized Legacy gifts</p>	\$600,000	\$669,244	\$250,000
<p>New Legacy commitments</p>	40 new commitments, minimum estimated value \$2.5M	122 new commitments, estimated value of \$8.3M	50 new commitments, minimum estimated value \$4M
<p>10/14 partner organizations meet or exceed legacy targets</p>	10/14	7/14	10/14
<p>Operational improvements achieved</p>	100%	66% fully or partially achieved	80%
<p>Successful implementation of the Foundation’s 50th celebration Plan</p>	At least 10 elements delivered (e.g. new tribute cards, speaker series, monthly social media posts)	N/A	N/A

Appendix A
Ottawa Jewish Community Foundation 50th Anniversary Celebrations

The Ottawa Jewish Community Foundation's milestone anniversary of 50 years deserves to be celebrated and is a meaningful platform on which to further promote the Foundation and giving. This 2021 plan is for a year-long celebration and is being continuously updated.

The plan includes the following key elements:

- Promote 50 years of Impact (the people and organization that have been helped)
- Promote 50 years of helpers (the people who have been doing the helping – donors)
- Celebrate 50 years of leadership (board, chairs and founders)
- Limited and specifically targeted fundraising
- Special moments to raise the Foundation's profile (events and promotional material)

The plan combines new initiatives and special twists and upgrades on existing activities and any planned in-person activity later in the year can be adjusted to virtual if needed.

January Launch

- **Special 50th logo** unveiled and used in 2021
- Launch **5 new tribute card designs** in honour of the 50th
- **3-part virtual speaker series** (winter/spring). Utilize every possible connection for exceptionally high level speakers (e.g., titans of Wall Street, sports franchise owners, philanthropists, etc.)
- **Year-long social media and eBulletin promotion**
 - **January** history of founders and their families today (series of social media posts on some of the founding families).
 - **February** – Impact: Hillel Lodge
 - **March** – featured fund holder interview
 - **April** – Impact: SJCC
 - **May** – behind the scenes – our professional team, committee and volunteers
 - **June** - Torah Day School of Ottawa
 - **July** – Foundation by numbers, growth of assets under management
 - **August** – Impact: Tamir
 - **September** – interview with Bernie Shinder, Founder
 - **October** – Impact: Jewish Family Services
 - **November** – History of past Foundation chairs
 - **December** – Impact: Ottawa Jewish Community School

March-April

- Special **Passover tribute card** promotion
- Special podcast on the Foundation

May

- **Small cheque distribution “events”** held at each of the top 10 recipients (organized by them, we just show up). Note: provide each recipient grant up to \$250 for event expenses.
 - Photos subsequently shared on social media 2-3/week

June – July

- AGM-special program honouring all Foundation past chairs (and their descendants)
- **Special fund holder report**, which includes a beautiful card and a package of seeds
- **Impact report** – 50 years of supporting the community (including 10+ years of support for top 10 beneficiaries [by the numbers], archival and quotes from the first few decades, and repackaging some of the profiles done earlier in the year). Distributed to all endowment fund holders, legacy commitments, and donors to Federation’s Annual Campaign.

August

- Special **High Holiday tribute card** promotion

October

- **Life & Legacy celebration event** - special twist – focusing on historical legacy gifts received in addition to those received through the Life and Legacy program

November

- Special **Chanukah tribute card** promotion

December

- Year-end **direct mail campaign** to existing fund holders – top up your fund by \$50, \$500, or \$5000. Can we get a matching donor (Note: 29% of all donors to Federation’s Emergency Campaign for Community Resilience did so in the 48-hour window when dollars were matched)?

Due to the exceptional circumstances of the pandemic, fundraising will be limited, but the extra promotional activities will set the Foundation up for future fundraising success.

Appendix B
Evaluation of 2020 metrics

Education and Outreach

- Comprehensive promotion of *Life & Legacy*. Examples include: video, ads, social media, and newly created signage (minimum 4 avenues).
Achieved: these were adapted to 2020 realities (e.g. no in-person events with signage) included: video, significant social media, e-blasts, email taglines, etc.
- Customized donor touchpoint based on fund designation (10 most frequent designations).
Not achieved: due to other priorities, this was not accomplished.

Fundraising

- Minimum 10/14 partner organizations meet or exceed their legacy targets (as per *Life & Legacy* metrics).
Not yet achieved: to date 7 have met or exceeded their legacy targets. Note: this will be updated on March 1, 2021 which is the deadline.
- Minimum 50 new legacy commitments (per person/household, not organizational), with a minimum estimated value of \$4M.
Achieved: this was exceeded with 122 new legacy commitments with an estimated value of \$8.3M.
- Raise a minimum of \$250,000 in new dollars (e.g. endowments, tribute cards, etc.).
Achieved: this was exceeded with \$669,244 raised.
- Minimum 85 face-to-face meetings (including those done by partner organizations).
Achieved: There were 97 meetings.

Governance and Operations

- 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.
Partially achieved: While the plan was created and approved, only 3/6 of metrics (50%) were successfully achieved (1/6 was partially achieved). A key metric not achieved was the preparation for the Generations Trust Campaign (\$25M endowment fund for Jewish education). When Federation postponed implementation of the campaign due to the pandemic, management felt Foundation's efforts could be better used elsewhere.
- Minimum 2 initiatives to engage past leadership with *Life & Legacy* initiative and the 2021 celebration of the Foundation's 50th.
Not achieved: Plans for the 50th were constantly shifting.
- Participation in all *Life & Legacy* training sessions by a minimum of 80% of partner organizations.
Achieved: Though shifted to virtual, this metric was surpassed.

Appendix C
2021 Continuous Operational Improvement plan

The Foundation’s new 2019-2023 Strategic Plan explicitly states the Foundation’s continued commitment to being transparent, efficient and having strong day to day operations. These are essential to achieve fundraising objectives and core to inspiring donor confidence.

As part of this effort, on an annual basis, management submits a plan to the board for approval focused on initiatives to support operations. This year’s plan is somewhat attenuated as most efforts will be focused on celebrating the Foundation’s 50th and implementing Year 2 of the Life & Legacy program.

	Opportunity/Need	Initiative
Life and Legacy	With 14 partners, there is a need for administrative systems to properly support partners, track metrics and steward legacy donors.	<ul style="list-style-type: none"> • Better/appropriate use of prospect tab in database • New system for reporting and tracking donor meetings
General Operations	The Jewish Federation of Ottawa, Torah Day School of Ottawa and the Ottawa Jewish Community School are embarking on a \$25M endowment campaign for Jewish education. The endowment will be held at the Foundation.	<ul style="list-style-type: none"> • Preparation of deed of gift, MOU, etc. • As needed, information/expertise to be shared with the schools for stewardship purposes

