

Ottawa Jewish Community Foundation 2014 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.

Introduction

This is a time of exciting change for the [Ottawa Jewish Community Foundation](#) (OJCF).

1. Building on the Collaborative Fundraising Model, the Centre for Jewish Philanthropy (CJP), a partnership with the [Jewish Federation of Ottawa](#) (JFO) was launched in the Spring of 2013.
2. Flowing from the 2009-2014 Strategic Plan which focused our work for the last 5-years, under the leadership of vice-chair Michael Landau, a new 5-year [strategic plan](#) is being drafted to guide our activities and by which we will measure our success.
3. A new partnership has been forged with the JFO, which, in addition to the CJP, includes a shared CEO and a new staff structure whereby roles are more clearly defined between fundraising and operations.
4. A new donor friendly [website](#) has been built to support fundraising and help promote our overall brand.

The primary focus of this business plan is the growth of fundraising initiatives. In reviewing the business plans of the past few years, there was a great deal of emphasis on building a strong foundation (e.g. marketing tools, strong governance, etc.). With such a sturdy foundation in place, we are now in position to take our fundraising to the next level.

Education and Outreach

To better reflect the Marketing Committee's scope of work, the Strategic Planning Committee will be recommending that the committee be renamed Education and Outreach.

Key initiatives in this area include:

1. **New [Website](#)**
 - a. Launch and general promotion
 - b. Specific [tribute card](#) promotion, including the promotion of non-holiday tribute cards
 - c. Track metrics (e.g. online donations)
 - d. Explore the feasibility of an e-card program

2. **Develop and implement year-round communication touch points with donors**
 - a. Early Fall – annual reminder about fund allocation deadline
 - b. Winter (December) – newsletter
 - c. Early Spring – letter on investment results and annual fund activity reports to be sent to all fund holders
 - d. Late Spring – Agency thank you letters. Possibly also send annual report

3. **Work on greater customization in donor communication** (e.g. whenever possible, a newsletter customized with an agency story that is directly impacted by their fund's allocation).

4. **Develop greater relationships with [funded agencies](#)** (top 10) – In order to improve donor recognition process (e.g. thank you letters) and the compilation of stories from beneficiary agencies and donors alike, etc.

Governance

To better reflect the Board Development Committee's scope of work, the Strategic Planning Committee will be recommending that the committee be renamed Governance. Key initiatives in this area include:

1. Examine increasing the [board's](#) size for 2014/2015, with a view to adding philanthropists and community leaders.
2. At [board meetings](#), plan sessions to further develop the board's level of expertise (e.g. agency presentation, learning about giving vehicles, etc.)
3. Review current [committee structure](#) and make appropriate recommendations
4. Engage past leadership (e.g. invitations to board meetings, serve on committees, gatherings of past chairs, etc.)

Fundraising

Pipeline and Prospect Development

1. Develop a robust pipeline of prospects. At present, there are 26 names on the list; in order to be successful, in 2014, this list needs to be expanded to 125-150 potential donors
2. Encourage face-to-face cultivation, solicitation and fundraising meetings
3. Marquee annual events – currently [Pearls of Wisdom](#) and the Power Breakfast
 - a. Pearls of Wisdom to take place again
 - b. Discuss potential changes to the Power Breakfast that considers the following aspects: stewardship (existing donors), encouraging existing donors to contribute additional \$, brand awareness (Foundation profile) and outreach/identification of new donors
4. Form and establish Professional Advisory Council (PAC) with the goal of identifying prospects and new “product” (e.g. flow through shares) to a specific niche market
5. Always look for vehicles in which to promote giving (e.g. participate in International Giving Tuesday program)

Key Deliverables:

- 1) 125-150 Person Pipeline Developed
- 2) 125 1:1 Cultivation Meetings
- 3) PAC Established
- 4) Develop Power Breakfast Event Plan

Specific Initiatives

B’nai Mitzvah

1. **Develop prospect list**
 - a. Reach out to all synagogues and request list of upcoming [B’nai Mitzvot](#)
 - b. Arrange meeting with CBB, NCSY, etc. to discuss the program and ask for assistance
 - c. Arrange meeting with schools (day and supplemental) to discuss the program and ask for prospects
2. **Outreach**
 - a. Develop direct mail to appropriate families and follow-up with calls
 - b. Offer to make presentations to groups or Board
3. **Post B’nai Mitzvah Outreach**
 - a. Develop direct mail to all families with funds established before 2012 to encourage continued use (e.g. to celebrate graduations from high school/college)

Key Deliverables:

- 1) All synagogues contacted
- 2) All identified families followed-up with (mail and phone)
- 3) One mailing to all previously established B'nai Mitzvah funds

Legacy Giving

1. Data mining from the annual campaign (e.g. consistent givers 15+ years) leading to the creation of a 200+ person list (number may be adjusted following data mining process)
2. Develop a mailing with an ask, followed by “cold” calls
3. Use Legacy month in May to promote legacy giving (e.g. ad in the [OJB](#), PAC program, e-blast, etc.)
4. Maximize use of the [Legacy Challenge](#) (e.g. look for venues/locations at which the legacy challenge brochure can be distributed)

Key Deliverables:

- 1) 200+ person potential target list created
- 2) Of the potential target list, a minimum 25% personally approached
- 3) The Legacy Challenge Program promoted through a minimum promotion of 2 vehicles (e.g. the Bulletin, lawn sign etc.)

Lion of Judah Endowment

1. Develop a specific prospect list
2. Form small working committee focused on fundraising
3. Work with annual campaign canvassers to help develop sales force (e.g. could be part of annual ask)

Key Deliverable: 1) Discussion with 7-10 current Lions

Tribute Cards

1. Develop card design for Passover
2. Continued holiday promotions and outreach (e.g. including calls to repeat customers)
3. Minimum 2 e-blast promotions, non-holiday related

Deliverables are clear from above points

Women's Collective Philanthropy Program

1. Engage new women in the Jewish community and foster a spirit of inclusiveness, primarily through [Pearls of Wisdom](#)
2. Increase fundraising
 - a. Capitalize on key moments in time (e.g. Mother's Day, highlighting unfunded [grant applications](#), etc.) to secure renewed commitments from members of the Collective
 - b. Secure new donors to the Collective (e.g. follow-up with past attendees of Pearls of Wisdom)

Key Deliverables:

- 1) A minimum of 10% Pearls of Wisdom attendees are new to the “system”
- 2) An additional \$25,000 raised for the Women’s Collective Endowment Fund
- 3) From the \$25,000 raised: 25% current members of the Collective make a renewed financial contribution and 8-10 new members join

Centre for Jewish Philanthropy

The Foundation and [Federation](#) should continue to deepen their partnership and collaboration. The pilot project with approximately 100 donors will continue (although the list will be revised) and increase as high as 125 individuals. Specific actions include:

1. Place a greater emphasis on the year-round relationship building aspect
2. Determine key metrics for success
3. Emphasize the Foundation’s ability to steward multi-year gifts (e.g. gift for a specific 10-year project)

What does success look like?

Our deliverables are not “product” or initiative specific (e.g. insurance, women’s collective), but rather focused on increased giving in general – both in terms of the # of new philanthropists and the \$ raised. As the pipeline becomes more robust, fundraising targets can become increasingly ambitious.

	Action Item	Minimum deliverable
Foundation-wide	Board approved strategic plan 2014-2018	
Active Prospect Development	Prospects on pipeline (people and agencies)	125
	Cultivation meetings (includes face to face canvasses through CJP)	125
	Stewardship 1:1 meetings	30
	Professional Advisory Committee	2 meetings
Fundraising Targets	New endowments	10% increase
	New \$ contributed into foundation (e.g. tribute cards, new \$ into existing funds, etc.)	10% increase
	% active endowment funds (gifts within last 12 months)	10% increase
	# new legacy expectancies	10% increase
	\$ new legacy expectancies (est.)	10% increase
	# new agencies establishing funds	2
Marketing	Events	1
	Communication touch points	4
Board Development	Learning sessions at board meetings	75% of board meetings (e.g. includes agency presentations)
	Board composition	Addition of 2 new philanthropic and community leaders 2014/15
	Gatherings of Past Chairs	1

Note: Based on the Strategic Plan (approved in March), new deliverables may be added in terms of dollars raised and/or deferred gifts secured and others may be adjusted slightly so that our Strategic Plan and Business Plan are appropriately aligned.