



Jewish Federation of Ottawa
Strategic Plan Report
3 Year Update





MISSION

To advance and promote an exceptional quality of Jewish life

VISION

A thriving Ottawa Jewish community that is inclusive, accessible, educated and engaged

CORE VALUES

Torah, chesed (loving-kindness), k'lal Yisrael (Jewish peoplehood),
tzedakah (philanthropic giving), and tikkun olam (repairing the world)

Enduring affinity and support for the Jewish State of Israel

CORPORATE PRINCIPLES

Collaboration and partnership

Care, acceptance and respect for every individual

Transparency and accountability

Innovative and forward-thinking leadership

*"It is not your responsibility
to finish the work,
but you are not free
to desist from it either." (2:16)*



Dear friends,

June of 2017 marked the conclusion of the third year of the Jewish Federation of Ottawa's five-year strategic plan. As promised, while balancing other important community issues and priorities, we have maintained a constant focus on our strategic objectives. In Year 3, over 85% of initiatives were either fully or partially achieved.

Having passed the mid-point of the plan, this year, Federation is also reporting on overall progress toward all goals. We feel confident that with continued efforts and focus, the majority of goals will be achieved by 2019 and a great deal has already been accomplished! This includes:

- Introduction of exciting new programs, such as the Shinshinim program, that benefit so many in the community;
- A consistent and holistic effort to create a more welcoming and inclusive community – from training on inclusive messaging, to advertising for committee members and the dramatic increase in the effectiveness of social media as an outreach tool;
- A complete revamping of volunteer engagement – from a new student award, volunteer engagement programs to a volunteer matching program;
- Renewed commitment to Israel experience programs for adults – young leadership mission and JWRP trips;
- Annual Campaign growth and increase in other revenue sources as well;
- A strategic overhaul of our allocations process and how we share impact with donors and the community;
- The building of a strong future pipeline for Jewish education through a stellar and expanded PJ Library program; and
- The consistent strategic execution of our work in partnership with other organizations and convening others to partner together.

The notable exception to our strong success has been Federation's goal to support increased day school enrolment. With the unification of the two Orthodox day schools and with renewed leadership at the Ottawa Jewish Community School, even greater efforts will be made towards this important goal. At the same time, significant efforts will be made to raise even more dollars to support Jewish life in Ottawa.

We take great pride in all that has been accomplished and know that much work remains to ensure a vibrant future for our community. We look forward to working with you to achieve all our strategic objectives.

Sincerely,

Andrea Freedman
President and CEO

Hartley Stern
Chair

Goal # 1

Increase financial resources to support the Jewish communities of Ottawa, Canada, Israel and the world

Year 3 Results

Year 3 Specific Initiatives	Key Performance Indicator/Outcome	Outcomes
Increase resources available for allocation in the community	Expand corporate partners by two.	Not achieved - struggles continue in this area.
	Increase Annual Campaign over previous year.	Likely Achieved – as it currently stands, the Campaign is experiencing a very small increase, however some gifts remain outstanding.
	Evaluate the Centre for Jewish Philanthropy, including an exploration of new models of giving.	Achieved – The evaluation was completed and the Centre for Jewish Philanthropy is a successful model that should continue to be expanded. Several recommendations are now being implemented in this area.
Focus on the Emerging Generation	Increase dollars raised by the Emerging Gen Campaign by 20%.	Achieved – the Emerging Generation campaign increased by 22%.

Overall Progress After 3 Years

Strategic Plan 5 Year Measurable Targets	Strategic Plan Outcomes to date	To the goal
Increase Annual Campaign each year	The Annual Campaign has been increasing, but modestly.	Continued growth is necessary in order to achieve this goal.
Increase fundraising significantly by 2019, leading to a minimum of 25% more annual dollars available through multiple giving mechanisms. Vehicles include the Annual Campaign, supplemental giving, corporate partnerships, and the foundation directing annual disbursements to local Jewish causes and Israel-based charities	In 2014, from all revenue sources (e.g. Annual Campaign, Foundation, supplemental gifts, events, etc.) \$6.362M was raised. In 2017, revenue has increased to \$7.236M from all revenue sources. This represents an increase of more than 13%.	Revenue from all sources has increased and the overall goal is within reach. However, enhanced efforts will be made to raise additional funds.
Increase the dollars raised by the Emerging Generation division by 30% each year	The campaign has grown from \$15,000 to \$39,000 over the last 3 years.	The Emerging Generation is on track to achieve the overall goals of revenue and the number of donors.
Double the number of annual donors in the Emerging Generation by Campaign 2019	The number of donors has grown from 120 to 211.	
Perform an annual evaluation of the Centre for Jewish Philanthropy to ensure it is effective in meeting donor needs and increasing dollars available to the Ottawa Jewish community and Israel	This has been done each year to date and results are positive.	The model is successful and several aspects (e.g. Legacy Campaign) have been identified as areas for further development.
Explore new models of giving with the Annual Campaign that balance donor choice with the community's highest priority needs	A three-year pilot project for the Emerging Generation was created to explore donor choice by allowing donors to direct their gift to the pillar of their choice (e.g. helping the vulnerable).	When concluded, the results will be analyzed to determine if the pilot should be expanded.

Summary: While resources have increased and the goal is within reach, it has become increasingly clear that significantly more dollars are required to meet needs, in particular for Jewish education in Ottawa. The Emerging Generation, the future of our campaign, has experienced tremendous growth and is on track to exceed all goals.

Goal # 2

Manage and communicate a transparent and

responsible process to allocate funds from the Annual Campaign

Year 3 Results

Year 3 Specific Initiatives	Key Performance Indicator/Outcome	Outcomes
Expand reporting on the impact of funding to agencies in the community	Develop a new report on allocations and widely promote across multiple platforms.	Achieved: A newly created Impact Report, highlighting the community-wide impact of funding, has been widely distributed across multiple platforms.
	Communicate a minimum of 10/year, emphasizing the impact funding is having in the community highlighting key accomplishments.	Achieved: 12 new messages were shared across social media channels, highlighting funding to agencies, linking directly to partner agencies and to Federation funding reports. The posts generated significant traction.

Overall Progress After 3 Years

Strategic Plan 5 Year Measurable Targets	Strategic Plan Outcomes to date	To the goal
Comprehensive review of allocations process to agencies	Completed in May 2015.	This goal has been achieved.
Review of funding formulas for Jewish schools	Completed in November 2016.	The goal has been achieved, however more work remains to ensure that day schools receive increased funding.
Implement a minimum of 3 new strategies to improve transparency around funding decisions	To date, three new strategies have been implemented: <ul style="list-style-type: none"> Funding criteria are clearly stated on Federation's website, and are clearly articulated at face-to-face meetings with funded agencies; Reasons for funding (or not) are clearly explained to agencies; and A new infographic explaining the allocations process was shared with the community. 	This goal has been achieved and its effects remain ongoing.
Minimum 3 new tools to share funding decisions and outcomes with the community	To date, two new tools were developed: <ul style="list-style-type: none"> A new Impact Report; and Year-round social media campaign to share funding decisions and outcomes. 	One new tool remains to be implemented and is likely to be achieved.

Summary: Important steps have been taken to review and revamp the allocations process and to better share outcomes and impact. This is an area of success.

Goal # 3 Foster greater cooperation, partnership among community agencies and organizations

Year 3 Results

Year 3 Specific Initiatives	Key Performance Indicator/Outcome	Outcomes
Significantly increase opportunities for Jewish organizations to work together	Offer one high-level training program aimed at enhancing the welcoming nature of all Jewish organizations and the sharing of best practices, with an 80%+ satisfaction rate among participants.	Achieved: A workshop was presented by Dr. Ron Wolfson (“The power of relationships to transform the Jewish community”). Eighty people participated, representing more than 15 Jewish organizations, and gave the session an average rating of 8/10.
	Successful implementation of Young Leaders mission to Israel, with participant satisfaction rate of 85%+, and a comprehensive strategy to build group cohesion and a broad understanding of community challenges and participants' role in meeting them.	Achieved: Eleven young leaders were nominated by local organizations in which they are actively involved, to participate in a leadership mission to Israel in January 2017. Participants rated the experience an average of 8.7/10. The group continues to meet and discuss ways to strengthen the community, though more work is needed in this area.
	Successful implementation of the Jewish Women's Renaissance Project (JWRP) mission to Israel with a minimum of five follow-up programs involving a minimum of five different organizations.	Achieved: Thirty-six women participated in the November 2016 JWRP trip. Since their return, there have been a minimum of three opportunities per month to participate in follow-up programs. To date, seven organizations have provided programs and engagement is on-going.

Overall Progress After 3 Years

Strategic Plan 5 Year Measurable Targets	Strategic Plan Outcomes to date	To the goal
Minimum of three new joint initiatives to benefit Jewish organizations	To date there have been three new joint initiatives: <ul style="list-style-type: none"> Joint professional development for teachers and for volunteers and lay leaders of Jewish organizations (Two sessions/year for teachers, two/year for agencies). Feedback from sessions is extremely positive; Young leadership mission to Israel; and JWRP mission to Israel. 	This goal has been achieved and efforts will continue.
Create two new forums to share ideas and explore opportunities for collaboration	To date, one new forum has been operationalized: <ul style="list-style-type: none"> Federation convened Torah Academy and Rambam, and through negotiation and facilitation, was actively involved in the unification of the schools into Torah Day School. 	This goal is tracking well, at the same time, adjustments have been made to convene forums for particular projects such as the high school task force, the Shabbat project, etc., as opposed to regular forums.
Explore new models of cooperation to address the growing needs of seniors	To date, two new initiatives have been implemented: <ul style="list-style-type: none"> Federation undertook a survey of seniors in the spring of 2015, to determine the demand for and feasibility of adding housing for seniors as part of Tamir's plan for an Integrated Living Centre on the Jewish community Campus. It was determined that there was a lack of commonality in the desired type of housing. A survey of Jewish baby boomers was conducted across Canada by our partner, JFC-UIA, and Federation shared results. 	While models have been explored, more dialogue and discussion is needed to determine if additional models of cooperation should be considered.

Summary: As a result of the strategic plan, positioning Federation as a convener, partnerships and cooperation have been a priority which has benefited the entire community.

Goal # 4 Expand involvement and engagement

in Jewish life and learning for all ages

Year 3 Results

Year 3 Specific Initiatives	Key Performance Indicator/Outcome	Outcomes
Expand involvement and engagement in Jewish life and learning for all ages	Increase holistic efforts around the importance of Jewish education: minimum two initiatives promoting Jewish education and building a Jewish pipeline, leading to a 15% increase in SK and 10% increase in supplementary school enrollment.	<p>Partially Achieved: While enrollment in Day School SK remained flat compared to the previous year, there was an 18% increase in enrollment in supplementary schools over the previous year. Several supplementary schools overhauled their programs which contributed to this increase.</p> <p>Federation undertook several initiatives to promote Jewish education including connecting PJ Library families to educational options by providing information, a personalized concierge service, and joint professional development opportunities for teachers to promote quality and excellence in education.</p>
Increase involvement in Jewish life	Utilizing results of the young family survey, work with community organizations to improve perceived value: customized presentations for all organizations, and at least five organizations implement specific initiatives to address issues.	Achieved: Customized presentations of survey results were provided for all organizations. From this, two organizations used the results to reinforce their successful programs, four have undertaken new initiatives to address opportunities, and two organizations did a deeper dive into the results to learn more (SJCC and OJCS).
Create a more welcoming and inclusive Jewish community.	Launch a revitalized Jewish Infocentre online that increases inquiries by 50% over the previous year.	Achieved: A new online Infocentre was launched and promoted in the spring, significantly increasing inquiries.
	Start to implement the various recommendations made through the Inclusivity Outreach initiative.	Achieved: An audit of Federation's website and marketing collateral material was conducted to ensure that images and text is diverse and inclusive; Federation has also created a new inclusive tagline: <i>A Place for Everyone</i> , that will appear on promotional material; and Federation will actively recruit new and diverse people for its committees.

Overall Progress After 3 Years

Strategic Plan 5 Year Measurable Targets	Strategic Plan Outcomes to date	To the goal
Increase enrolment in day and supplementary schools by 35% by 2019	<p>Despite many efforts, over three years, enrolment in day and supplementary schools has only increased by 13 students (-51 students in day school and +64 students in supplementary school. Efforts to date include:</p> <ul style="list-style-type: none"> • PJ Library books reach 550+ children, and regular programming attracts hundreds; • Expanded PJ focus on parents, creating social networks, etc; • PJ programs offered in partnership with education institutions; • Social mapping, and outreach; • Promotions through multiple channels; and • Increased annual funding. 	<p>Great efforts have been made in this area and need to continue.</p> <p>With the successful unification of one excellent Orthodox day school – Torah Day; a dynamic new leadership team at the Ottawa Jewish Community School; exciting and new developments at several supplementary schools – the trend can hopefully become more positive.</p>
Increase number of youth engaged in informal Jewish experiences by 20% by 2019 (Israel trips, Ottawa camps, youth groups)	To date, there has been a 13% increase in the number of youth participating in informal Jewish opportunities. In 2014, there were 776 youth, and in 2016 there were 875 youth who participated in activities such as Israel trips, Jewish camps, youth groups and programs.	With additional efforts, this goal is within reach.
Increase affordability for families considering a Jewish experience	Using the results of the young family survey, and building on the success of the PJ Library program, Federation has been working to create a strong pipeline of feeder programs that will engage families in more Jewish programs and schools.	This goal requires funding.

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Goal # 4 Expand involvement and engagement

in Jewish life and learning for all ages (CONTINUED)

Overall Progress After 3 Years

Strategic Plan 5 Year Measurable Targets	Strategic Plan Outcomes to date	To the goal
A minimum of two new community building activities	To date, 3 new initiatives have been implemented: <ul style="list-style-type: none"> • In 2014, Federation launched the Fund for Innovative Capacity Building, providing grants to partner agencies for projects that aim to improve operations and strengthen organizations. In 2017, the fund was extended to include synagogues. From 2013-2016, over \$195,000 was distributed for 26 projects that have benefited 14 agencies; • In 2014, the Shabbat Project was initiated and continues; and • In 2016, a new family friendly Campaign kick-off event was added and continues. 	This goal has been exceeded and efforts will continue.
Introduce 2 new shared marketing initiatives	To date, 2 new initiatives have been implemented: <ul style="list-style-type: none"> • Federation launched a community listing for Jewish holidays promoting happenings in synagogues and other organizations; and • New social media campaign to share the impact that funding has in the community. 	This goal has been met and efforts will continue.
Implement one new Israel engagement project to connect the local community to the history, culture and people of Israel	The Shinshinim program brought two young Israeli emissaries to Ottawa in September 2016, to work with multiple organizations and organized various community events.	The Shinshinim program is tremendously successful and is now entering its second year.

Overall Progress After 3 Years

Strategic Plan 5 Year Measurable Targets	Strategic Plan Outcomes to date	To the goal
Create a more welcoming Jewish community: <ul style="list-style-type: none"> • Strive for a greater diversity of people in Federation boards, events and committees; • Use inclusive messaging; and • Increase the number of people being reached with our communication channels. 	An inclusivity task force was formed and their recommendations are being implemented (see section in report on Year 3 work plan). Additionally, a greater emphasis was placed on social media which has increased our reach by more than 200%.	Federation has made significant strides in this area and efforts continue.

Summary: With the notable exception of increasing enrolment in Jewish day school, significant progress has been made in all areas, and all targets have either already been met, or are likely to be met.

Goal # 5 Attract and develop diverse volunteers

Year 3 Results

Year 3 Specific Initiatives	Key Performance Indicator/Outcome	Outcomes
Engage an increased number of volunteers	Create and implement a personalized volunteer-matching program, including professional skills donation and concierge follow-up services, placing a minimum of 30 volunteers within a minimum of eight different community organizations.	Achieved: The Volunteer Centre was launched with a personalized matching program with concierge follow-up services. To date, 44 volunteers have been placed in eight organizations through the new program.
Renewed energy to thank volunteers	Initiate a new volunteer appreciation program to better thank volunteers and further encourage active volunteerism.	Achieved: The appreciation program has several components: special newsletter devoted to volunteerism, monthly volunteer spotlight, significant promotion efforts of the volunteer centre (e.g. table at major community events) and periodic eblasts to the community with volunteer opportunities.

Overall Progress After 3 Years

Strategic Plan 5 Year Measurable Targets	Strategic Plan Outcomes to date	To the goal
Create a volunteer matching program that places a minimum of 100 volunteers or 20 volunteers annually	Volunteer matching program was created in Year 3 and 44 volunteers have been placed.	Prior to the creation of the volunteer matching program, there were informal efforts to place volunteers and approximately 25 were placed. Accordingly, there remains a minimum of 31 volunteers to place, which is likely to be exceeded.
Honor and thank a broad spectrum of volunteers by implementing a minimum of two annual volunteer appreciation initiatives	To date, two new initiatives have been implemented: <ul style="list-style-type: none"> • A new annual award recognizing student leadership; and • A new "Volunteer Spotlight" has been created to highlight and show appreciation for community volunteers using social media 	This goal has been met and efforts will continue.
Initiate a minimum of one annual volunteer or leadership program on a rotating basis	To date, three initiatives have been implemented: <ul style="list-style-type: none"> • 2014: Volunteer engagement initiative brought 11 adults, aged 35-55, together to help them identify volunteer opportunities; • 2015/16: Young Adult Leadership Mission to Israel with 11 young adults (group was formed in 2015 and the trip took place in early 2016); and • 2016: JWRP trip to Israel engaged 36 women in a life enhancing experience that inspired them to become more engaged in their own community (e.g. 19 are now active community volunteers). 	We are on track to achieve this goal and have made an effort to target different programs to different demographics.

Summary: By adhering to the strategic plan, Federation has significantly and successfully renewed efforts at engaging volunteers and the work will continue.

Strategic planning is critical to any non-profit organization: it sets the tone for how board members govern, how professionals manage, how funds are raised, how lay leaders and staff are evaluated by the community, and how change and growth happens.

In the summer of 2013, Federation began a process that resulted in a new and invigorated strategic plan to set the tone for the community.

This plan focused Federation's efforts on five priority goals over a five-year period. The Federation team is committed to reporting back to the community on a regular basis on its progress in achieving the stated goals.

Ultimately, this is not a plan for the Federation, but Federation's plan for the community. Through the successful execution of this plan, Federation strives to benefit both Jewish organizations and individuals in Ottawa.

Reports can be found on our website under the [Giving](#) tab at jewishottawa.com/giving/reports



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