

### **Strategic Plan: High Level 5-Year Work Plan**

The strategic plan is for five-years, while this work plan only focuses on the first 4 years. Work in the 5<sup>th</sup> year will be determined by progress made to date, an assessment of where further efforts are needed and by fine-tuning initiatives. The work plan is more detailed for Year 1, and activities planned for Years 2-4 are tentative and will be based on the outcomes of prior years. Detailed work plans will be created at the start of each year.

**There is a strong desire to demonstrate tangible and immediate success, as evidenced by the comprehensive Year 1 work plan (separate document).**

The years coincide with the Federation's fiscal year (July 1 to June 30).

**This plan only chronicles high-level new initiatives/emphasis and does not detail on-going work.**

Although not specifically outlined in the work plan, there are a few global actions/attitudes that will help us achieve success:

1. Making our mission, vision, core values and corporate principles actionable and a constant aspect of our work. Before Federation implements a new initiative or program, we will always question:
  - a. How can it be more inclusive or accessible?
  - b. Does it further our Jewish core values which make us unique?
  - c. With a broad and holistic understanding of what happens in the Jewish community, can we encourage partnership first and bring individuals and organizations together?
  - d. Can we increase transparency and accountability?
2. Professional staff and board members make the time for more 1:1 meetings and discussions, and to be present at community events and functions to understand community concerns, connect with agencies and community organizations, hear ideas and connect with an increasing number of individuals. Federation will focus on customer service and satisfaction in all interactions
3. Focused leadership – in order to successfully accomplish the strategic plan, we need to stay focused on activities that directly advance the goals within this strategic plan, and not be afraid to decline other important initiatives and ideas that do not align with these goals
4. While there is a need to demonstrate “quick wins”, this must be balanced by the needs to research best practices and consult with key stakeholders.

**GOAL 1 - Increase financial resources to support the Jewish communities of Ottawa, Canada, Israel and around the world**

|  | Year 1 (2014-2015)  | Year 2 (2015-2016)   | Year 3 (2016-2017)   | Year 4 (2017-2018)   |
|--|---|--|--|--|
| <b>Grow the Annual Campaign every year &amp; increase annual funds available by 25%</b><br>(2014: \$5.9M, 2019: \$7.38M)   | GROW ANNUAL CAMPAIGN<br>-Hire a director of development<br>-Initiative to increase face to face canvassing<br>-Top Donor upgrade task force<br>-Timely and increased thank yous<br>-Focus on expanding corporate partners<br><br>INCREASE ANNUAL FUNDS<br>-Enhance partnership with the Foundation<br>-Meet annual CJP benchmarks, Foundation business plan benchmarks and Annual Campaign KPIs<br>-Increase 1:1 relationship building meetings | GROW ANNUAL CAMPAIGN<br>-New database<br>-Focus on new and lost donors<br>-Challenge fund (matching fund) for new/lost donors and or to motivate increased giving<br>-Emphasize monthly giving on credit card<br><br>INCREASE ANNUAL FUNDS<br>- Increase grant proposals | GROW ANNUAL CAMPAIGN<br>-Arrears initiative<br>-Better connect donors to funded agencies<br>-Parlor meetings<br><br>INCREASE ANNUAL FUNDS<br>-Begin family philanthropic conversations, increase involvement of the adult children of top donors | INCREASE ANNUAL FUNDS<br>-Words and Deeds fundraising dinner |
| <b>Increase the dollars raised by the emerging generation division of the Annual Campaign by 30% each year, and double the number of its annual donors</b><br>(2014: \$15,000 by 120 donors, 2019: \$55,700 by 240 donors) | -Improve efficiency of database integration with event participants<br>-Start the Ben Gurion Society (BGS), with an emphasis on face to face canvassing<br>- EG Cell-A-Thon   | - Emphasize monthly giving on credit card<br>- Year round engagement with canvassers to cultivate leadership, special emphasis on BGS development  |  |  |
| <b>Perform an annual evaluation of the Centre for Jewish Philanthropy</b>  | -Fully implement Center for Jewish Philanthropy (CJP) pilot project by implementing the concierge service aspect<br>- Perform assessment of CJP metrics   | - Conduct evaluation of CJP  | - Based on evaluation of CJP, implement recommendations  |  |
| <b>Explore new models of giving within the Annual Campaign (directed giving)</b>   |   | -Form committee to research best practices on directed giving, consult stakeholders, develop 2-3 potential models, and make recommendations to the board   | - Possible implementation of a pilot project   |  |

**GOAL 2 - Manage and communicate a transparent and responsible process to allocate funds from the Annual Campaign**

|   | Year 1 (2014-2015)   | Year 2 (2015-2016)  | Year 3 (2016-2017)  | Year 4 (2017-2018)   |
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| <b>Conduct a comprehensive review of the grants and allocations process, including re-examining the formula</b> | -Fall 2014 task force to review the grants and allocations process and make recommendations to ensure we are | -Fall 2015 recommendations are implemented and fully shared | -Solicit feedback from key stakeholders on new grants and | -2 <sup>nd</sup> strategy to improve transparency is implemented |

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| <p><b>used to determine allocations within the education envelope. Further, Federation will implement a minimum of three new strategies to improve transparency with agencies</b></p> | <p>meeting needs AND providing excellent stewardship of donor dollars<br/> - By May 2015, report is presented to the board<br/> -Report includes recommendations to improve transparency and communication with agencies<br/> -May 2015 top donor briefings on new grants and allocations process</p> | <p>and communicated<br/> -Hold an all agency meeting and 1:1 meetings with each agency to review new process (1<sup>st</sup> strategy to improve transparency)<br/> - Form Education Envelope committee to research best practices, consult stakeholders, develop 2-3 potential models, and make recommendations to the board</p> | <p>allocations process and fine tune as appropriate<br/> - New Education Envelope formula is explained, implemented and communicated</p> | <p>-3<sup>rd</sup> strategy is implemented</p> |
| <p><b>Develop a minimum of three new tools to share funding decisions and outcomes with the community</b></p>   | <p>-1<sup>st</sup> new tool to share funding decisions is implemented based on funding recommendations for 2014-2016 passed by the board in May 2014</p>  | <p>-Staff report on how best to accomplish communication with community</p>   | <p>-2<sup>nd</sup> new communication tool implemented<br/> -3<sup>rd</sup> new tool implemented</p>                                      |  |

**GOAL 3 - Foster greater cooperation and partnership among community agencies and organizations**

|   | <b>Year 1 (2014-2015)</b>  | <b>Year 2 (2015-2016)</b>  | <b>Year 3 (2016-2017)</b>   | <b>Year 4 (2017-2018)</b>  |
|---|--|--|---|--|
| <b>Offer a minimum of three new joint initiatives that directly benefit Jewish organizations in Ottawa, and create two new forums to share ideas, disseminate information and explore opportunities for cooperation</b> | - Create forum for Rabbis (1 <sup>st</sup> new forum)  | -1/2 day retreat bringing together all community organizations to develop consensus on what initiatives and forums are most needed (consultation to ensure joint activities are the most beneficial to partners) | -Implement 1 <sup>st</sup> and 2 <sup>nd</sup> new joint initiative (based on consultation) | -Implement 3 <sup>rd</sup> new joint initiative<br>- Implement 2 <sup>nd</sup> new forum |
| <b>Explore new models of cooperation and partnership to address the growing needs of seniors in our community</b>   | -Bring together key stakeholders to explore Integrated Living Centre and seniors<br>-Survey of seniors completed |  |   | -Consult with key stakeholders to develop new areas of cooperation and partnership       |

| <b>GOAL 4 - Expand involvement and engagement in Jewish life and learning, for all ages</b>   |   |  |   |  |
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|   | <b>Year 1 (2014-2015)</b>   | <b>Year 2 (2015-2016)</b>  | <b>Year 3 (2016-2017)</b>   | <b>Year 4 (2017-2018)</b>  |
| <p><b>Initiate community-wide endeavours to increase the number of children receiving a Jewish education (day and supplemental) by 35%, and to increase the number of local Jewish youth and students engaged in informal Jewish experiences by 20%</b><br/>(2014: 680 in Jewish schools, 2019: 918)(2014: 776 Jewish experiences, 2019: 931)</p> | <ul style="list-style-type: none"> <li>-Advocate Hebrew Free Loan project for day schools</li> <li>-Concrete effort by Federation and the Bulletin to profile day schools</li> <li>-Explore marketing in local newspapers and other strategies to target the less affiliated</li> <li>-Assist day schools with marketing, as appropriate</li> <li>-Organize one collaborative joint project between all four Jewish day schools</li> <li>-Federation and Bulletin make a concerted effort to raise profile of informal youth experiences</li> <li>-Build “pipeline” of collaboration between Jewish organizations so that children move seamlessly from experience to experience</li> </ul> | <ul style="list-style-type: none"> <li>-1 or 2 joint marketing initiatives by all Jewish day schools</li> <li>-Joint marketing initiative undertaken with youth groups</li> <li>-Enhanced marketing of Israel experiences and scholarships</li> </ul>                          | <ul style="list-style-type: none"> <li>-Enhanced professional development for youth group professionals</li> </ul>  |  |
| <p><b>Create a program that increases affordability for families considering a Jewish experience</b></p>  | <ul style="list-style-type: none"> <li>-Comprehensive research of best practices with report to the board on holistic affordability models (e.g. shuls, schools, etc.)</li> <li>-Work with day schools on ways to collaborate and share resources</li> </ul>  | <ul style="list-style-type: none"> <li>-Raise necessary funds and build necessary partnerships to implement pilot affordability program</li> </ul>   | <ul style="list-style-type: none"> <li>-Implement pilot affordability program</li> </ul>  |  |
| <p><b>Initiate a minimum of two new community building activities, two new shared marketing initiatives, and one new Israel engagement project</b></p>  | <ul style="list-style-type: none"> <li>-1<sup>st</sup> new shared marketing initiative implemented to help build community</li> <li>-Plan Israel engagement program and raise necessary funds</li> </ul>  | <ul style="list-style-type: none"> <li>-New Israel engagement program initiated</li> <li>-1/2 day retreat with all community organizations to brainstorm and prioritize possible activities (same retreat as in Goal 3)</li> <li>-Staff drafted report to the board</li> </ul> | <ul style="list-style-type: none"> <li>- 1<sup>st</sup> new community building activity implemented</li> <li>-2<sup>nd</sup> new shared marketing initiative implemented</li> </ul> | <ul style="list-style-type: none"> <li>2<sup>nd</sup> new community building activity implemented</li> </ul> |
| <p><b>Strive for greater diversity of people participating in</b></p>   | <ul style="list-style-type: none"> <li>-Encourage community organizations to</li> </ul>   | <ul style="list-style-type: none"> <li>-Create customized e-</li> </ul>  |   |  |

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| <p><b>Federation events, boards and committees; use inclusive messaging ; and increase the number of people being reached with our communication channels</b></p> | <p>publicize our events<br/>         -Mandate explained to all committee chairs, with ideas on how to achieve greater diversity<br/>         -Communications committee to develop recommendations on inclusive messaging including use of a new tag-line<br/>         -Revamp website<br/>         -Increase social media, paid advertising and encourage staff and volunteers to personally use social media channels</p> | <p>blast lists (based on expressed interests)<br/>         -Comprehensive initiative to gather more emails<br/>         -Implement committee's recommendations on inclusive messaging</p> |  |  |
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**GOAL 5 - Attract and develop diverse volunteers and leaders**

|   | <b>Year 1 (2014-2015)</b>   | <b>Year 2 (2015-2016)</b>  | <b>Year 3 (2016-2017)</b>   | <b>Year 4 (2017-2018)</b>  |
|---|---|--|---|--|
| <b>Create an active matching program that pairs volunteers with needs in the community, and place a minimum of 100 volunteers or 20 volunteers annually</b> | -Informally place volunteers on an ad hoc basis   | - Implement Volunteer Matching Program   | - Enhance Volunteer Matching Program based on first year experience                                   |  |
| <b>Implement a minimum of two annual initiatives to appreciate volunteers</b>   |   | -Consultation at a members' meeting and with agency execs on how best to appreciate volunteers | -1 <sup>st</sup> new volunteer appreciation initiative implemented                                    | -2 <sup>nd</sup> new volunteer appreciation initiative implemented |
| <b>Initiate a minimum of one annual volunteer or leadership program on a rotating basis</b>   | -New community engagement program (ages 35-55) – learning about community, followed by volunteer placements | -Young leadership outreach/development program (22-40)   | -High level “executive education” leadership development program for current leaders of organizations | -Community engagement program                                      |