

Jewish Federation of Ottawa 2025-2030 Strategic Plan

Year 1 Business Plan (September 2025)

CONTEXT

This annual business plan is built on the work done over the last year to create Jewish Federation of Ottawa's latest strategic plan. In digesting the stakeholder engagement feedback, we are striving to cement Federation as the catalyzer, convener, and connector for the community. It is our role to demonstrate leadership by bringing our diverse community together – individuals, grassroots groups, and organizations – to address bigger themes and issues, while maintaining our position as the central voice for Ottawa's Jewish community, internally and externally, as well as locally, nationally, and internationally.

As we animate our strategic plan, we place focus on our human and financial resources, as well as attention to the key priorities and recommendations emanating from the plan. Federation will also continue to ensure our actions are not simply transactional, but relational. That is, we will engage with our community, our partners, and others in ways that build authentic, trusting, and long-lasting relationships.

The strategic plan's priorities and recommendations are ambitious and transformational. This business plan leverages the yearly workplan connected to our strategic plan, mostly considering years one and two, evaluating opportunities to begin the work in earnest, as well as establish a foundation for future work. The first business plan connected to our next five years will assist in determining those things we will do more of, as well as the things we will consider moving, or cease doing. In that sense, this first business plan is a learning and testing process – will our animating of the strategic plan be met with success, challenge, or a mix.

Our efforts in all facets will be focused on establishing and maintaining an organizational reputation of transparency, efficiency, effectiveness, and authenticity.

Per the strategic plan, Federation is entrusted with and dedicated to the overall welfare and vitality of the Ottawa Jewish community because no other entity can engage, convene, fund, and steward the entire community towards an expansive and inclusive ecosystem. When at its best, Federation ensures a notable Jewish presence with unmistakable signs of diverse Jewish life across Ottawa that attracts and retains Jewish families, donors, businesses, and allies.

This plan contains key initiatives that measurably address the various strategic plan objectives, but in no way reflect the totality of Federation's work.

Specific Initiatives

Strategic Plan Priority #1: Sharpening our distinct value proposition: Enabling our community to achieve more together.
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1. Each department, and the organization, will review current and planned offerings to determine how they fit with the Catalyze/Convene/Connect framework.
2. Current funding architecture and processes will be reviewed to redesigned to align with the intent and initiatives of the 2025-2030 strategic plan. Part of this process will involve assessing necessary volunteer infrastructure, as well as suggested funding envelope amounts going into year two.
3. Communications tools/platforms and methods will be evaluated to ensure a storytelling approach is used. The assessment and redevelopment of key elements for our communications and marketing suite will be considered, including refreshing our brand and digital assets to reflect our leadership role, and

measuring the success of our efforts by tracking followership and engagement, as well as creating feedback opportunities. Growth should be steady, and satisfaction/resonance should be favourable (75% or higher).

4. Engage in activities that position us as the central and trusted voice with civic, government, interfaith, business, and media partners. Continue to leverage the good will and talent of CCRC and CEAC in this work.

Strategic Plan Priority #2: Develop a culture of giving that resonates with and is adopted by all ages and stages.

1. Pilot at least two digital/alternative giving tools/campaigns (i.e. tiptap, rafflebox).
2. Continue to deepen the connection between BGS, Capital J, J-Fellows, and the broader donor base, including at least two gatherings, one directed to young adults specifically, and the other bridging generations (Dorot or another initiative).
3. Draw connections to the volunteer work of Federation's committees to campaign and other fundraising. Strive for 80% of committee members donating.
4. Successfully launch and run this year's J-Fellows cohort. Bring multiple cohorts together under one event.

Strategic Plan Priority #3: Provide cohesive leadership and responsive support against external threats.

1. Cultivate interest in, and lay the groundwork for three sector councils:
 - Aging and Vitality
 - Essential Jewish Services
 - Grow Jewish Ottawa
2. Identify tools for enhancing Israel education, experience, and engagement in the community. For example, shinshinim, Israel Fellow for Hillel, Partnership2Gether (P2G), Missions, etc. Implement or plan for appropriate tool use based on opportunities, cost, and potential impact.
3. As migration to a new CRM is implemented, ensure a plan is in place to collect and map more complete data including charitable giving (campaign, designated), participation (events, volunteering), and personal info and relationships (birthdate, family, business, etc.)
4. Build the community security strategy, leveraging JFNA's LiveSecure grant and a potential supervisory relationship with Jewish Security Network (JSN) from UJA-Federation of Greater Toronto. Create and populate a Community Security Committee for Jewish Ottawa.

Strategic Plan Priority #4 – Improve organizational operations and culture to transform Federation from good to great in order to best serve our community.

1. Review organization chart and current human resources and assess alignment with strategic priorities and recommendations. As part of the exercise, identify appropriate collaborative/alternative opportunities to ensure best talent and services are available (i.e. CIJA, Hillel).

2. Research and implement best options for enhanced benefits and technological improvements (i.e. online pay/leave access).
3. Identify and implement Human Resource professional solution (sub-contract or other).
4. Plan and execute all-staff retreat, complete with teambuilding and strategic plan focus.
5. Create a new process and timeline for financial reporting to staff and board, providing accurate, timely, and useful information.

What does success look like?

Federation's strategic plan and related initiatives will take flight. Our relational approach will be evident. Our community partners will feel valued and included in the work.

- Maintain at least flat revenue for the 2026 annual campaign despite current challenges, with a focus on donor retention and strategic engagement. We will begin to see benefit from alternative giving tools and corporate sponsorship.
- The three core councils included in the plan will attract attention and support from our community partners and others and will begin to establish solid foundations upon which to build.
- Our internal staff structure, processes, and trainings will be favourably received and support our plan.
- At least 80% of the initiatives in the Year 1 Business Plan are achieved.
- We will see and feel greater levels of participation by more diverse members of our community.
- Our community (especially donors and volunteers) will understand and appreciate Federation's efforts and will feel valued for their roles in animating our community.

Federation is confident that with generous donors and the continued partnership with outstanding community organizations, our community will move forward and thrive.