

Jewish Federation of Ottawa 2020 Strategic Plan

Year 3 Business Plan

Introduction

In June 2019, the Board of Directors of the Jewish Federation of Ottawa approved and introduced a bold new five-year strategic plan with tremendous excitement. At the start of the pandemic, in May 2020, as part of Federation's Emergency Campaign for Community Resilience, we recognized Federation's key role in seeing the community through the crisis and took immediate action that reflected our insight and understanding that introduced a concept that has become one of our North Stars *"Everything we do as individuals, as leaders, and as a community, will define who we are when this crisis is over."*

Currently, the Year 3 Business plan is being written (August 2021) in an environment of cautious optimism that there will be a return to the "next normal," tempered by concerns about the pandemic's fourth wave.

Federation recognizes that this is a historic moment in time, with unique opportunities, in addition to challenges.

- **Engagement in the Jewish community:** After 18 months of isolation, there is a yearning for physical connection and to be together as a community. Virtual programs have opened new doors to connect the world making it easier to participate (e.g. free programs, no travel or dressing up required, programs/speakers from around the world, etc.).
- **Pride in what has been accomplished:** The success of Federation's Emergency Campaign for Community Resilience, unprecedented local allocations, outstanding relationships with key agencies, and the new communications vehicles (particularly weekly Shabbat messages) have significantly increased positive perceptions of Federation and many agencies and community organizations. It has been a tough 18 months, but the perceived value and importance of community and Federation is high.
- **The "next" normal:** The pandemic shattered many long-held perceptions, meaning that if ever there was a time to tackle the "sacred cows" in our lives and the community, it is now. Furthermore, many experts are predicting a highly fluid employment environment as people re-consider their values and what is important to them. **The pandemic's generational challenge is creating generational change.** Federation will continue to be a nimble and thoughtful change agent.

With this in mind, the focus of Federation's work this year will be continuing to keep the foundation of Jewish Ottawa strong, to prioritize meeting the needs of the vulnerable, and to lead from a position of strength and possibility in building and widening the Jewish Superhighway - meaningful Jewish experiences and journeys, with no one is left behind.

Specific Initiatives

Strategic Plan Objective #1: Increase and deepen understanding of what the Jewish Federation of Ottawa does and funds, to communicate value as a trusted Jewish leader with unique leverage and influence.

Context: New communication tools were introduced by Federation last year, including the E-Bulletin, use of more video, Reports from the Field, and weekly Shabbat messages. The pace of change was rapid, and this year, priority will be given to evaluating and adjusting these new vehicles to optimize communication.

Specific Communication Initiatives

1. Evaluate the reach and impact of Federation's new communication vehicles (e.g. E-Bulletin, weekly Shabbat messages) and make any necessary changes.
2. Target specific audiences with more personalized messaging relevant to them (e.g. at least three specific groups with quarterly messages).
3. Continue to broaden Federation's reach through social media, reaching more people (Minimum 8% increase in new emails and 10% increase in social media reach).

Strategic Plan Objective #2: Build a strong pipeline of volunteers & professionals

Context: Emerging from the pandemic, many in our community have endured personal and professional challenges. Amazingly, there continues to be a desire for connection and for meaningful ways to help others as volunteers. At the same time, there appears to be a significant shift in the workforce, with analysts pointing to noteworthy transitions taking place. The impact of this societal workplace transformation requires careful thought and purpose.

Specific People Strengthening Initiatives

1. Federation Employee Engagement
 - For the second time, Federation participated in the Leading Edge survey on employee engagement. Understanding, sharing and then remediating (minimum three strategies/initiatives) on the results from the employee engagement survey will help further strengthen the Federation team.
 - Pending public health advisability, implement a successful hybrid return to the office.
2. Federation has many excellent and active committees, for example the Grants and Evaluation Committee. However, some important committees have been less active and require revitalization. This year, Federation will revitalize the Finance and Audit Committee and the Communication and Community Relations Committees.
3. J-Fellows provides leadership skills and a pipeline into community activism for young adults. Through speaker series and volunteer opportunities, engage young adults and help them to find their place to volunteer in the community.

Strategic Plan Objective #3: Strengthening Community Supports

Context: There is a continued need to support individuals and community organizations throughout the pandemic, with funding, skills training and the sharing of best practices/skills. The significant rise in antisemitism and the societal focus on systemic racism and issues affecting Black, Indigenous and People of Colour, necessitates enhanced advocacy efforts.

Specific Initiatives to Strengthen Community Supports

1. Enhance Allocations:
 - a. Continue Emergency Allocations into 2022 as required to meet all requests that are recommended for funding by the Grants and Evaluation Committee. **Federation will ensure that individuals and organizations are given all the tools required to successfully navigate the pandemic.**
 - b. Increase strategic funding in 2022 (minimum \$300,000).
2. Federation will increase efforts to fight antisemitism, along with our advocacy partner CIJA. This will include active “lobbying” for concrete proposals submitted to the government at the Emergency Summit and holding the Ottawa Carleton District School Board accountable to ensure the safety and well-being of Jewish students.
3. Federation will participate in societal reconciliation efforts with the Indigenous community and implement at least two opportunities for learning and understanding.
4. Recognizing the need for grant writing support, and the many new grant opportunities available, Federation will provide a grant writing training session for agencies and will create a centralized listing of available grants that are relevant to our community.

Strategic Plan Objective #4 - 20% increase in fundraising revenue, including establishing the largest endowment for sustainable Jewish education in Ottawa’s history.

Context: Many donors were exceptionally generous last year and at the same time, some individuals and businesses continue to suffer financial setbacks. Additionally, some community campaigns (e.g. Generations Trust) and fundraising events were either delayed, not held, or modified. All those who are in position to do so, will be asked to step up yet again and in unprecedented ways.

Specific Fundraising Initiatives

1. Work with our partners, the Ottawa Jewish Community School and Torah Day School of Ottawa to launch the **Generations Trust Campaign for Jewish Education**. The Generations Trust will be the largest endowment in our community’s history to make day school more affordable for families. This includes finalizing preparations and beginning to fundraise, with a minimum of \$15M pledged of the total \$25M goal.
2. Successful participation in Year 2 of the Life & Legacy initiative with a minimum of 18 community members signing a letter of intent to leave a bequest to Federation (of any size) in their will.
3. A best practise in donor retention is increasing the number of monthly donors. As a pilot project, a minimum of 25 first-time monthly donor will be secured.

Strategic Plan Objective #5: 20% increased Jewish engagement.

Context: Much changed in the past year, as by necessity we found new ways to engage and stay connected with others and in Jewish life. This year, we will seek ways to decrease the barriers to engaging in Jewish Ottawa and find ways to inspire people to re-connect with our Jewish community.

Specific Engagement Initiatives

1. Build on the micro-communities approach, focusing on specific groups with shared interests, and create Jewish cultural opportunities to engage people in Jewish life (minimum six micro events).
2. Through Microgrants, Federation will continue to support those in the community to provide creative and meaningful opportunities to connect to community and engage in Jewish life (heavy promotion of the program, leading to a new record investment of \$70,000 in worthwhile initiatives).
3. Federation will continue to use national partnerships to bring high-level programming to the community via virtual and hybrid events (minimum three events).

What does success look like?

There are many initiatives in this plan, and there are three overarching themes that will lead to success:

- Federation can only be successful, if the necessary resources are in place and achieving the desired results. In this case: human resources (volunteers and professionals), financial (three simultaneous major campaigns – Annual, Generations Trust and Life & Legacy), and evaluation (make sure that the actions we are taking are having the desired impact).
- Continued investment of the emergency allocations required to safely see the community through the pandemic.
- New pathways are continuously offered onto the Jewish Superhighway, fostering more and more Jewish engagement.

Federation is confident that with generous donors and continued partnership with outstanding community organizations, we will be successful.