

Jewish Federation of Ottawa 2020 Strategic Plan

Year 4 Business Plan

Introduction

With tremendous enthusiasm, in June 2019, the Board of Directors of the Jewish Federation of Ottawa approved and introduced a bold new five-year strategic plan. Much has changed in the world since then. As of the writing of this plan (August 2022), we continue to live through a pandemic. Moreover, the devastating war in Ukraine persists, antisemitism has risen sharply with no signs of abetting, inflation is high, the markets are unstable, and the “*great resignation*” and “quiet quitting” has challenged organizations’ ability to retain and recruit team members.

There remains a great deal of uncertainty and unrest in the world, and at the same time, there are tremendous opportunities: the yearning of people to connect, the continued passion of people to help, dedication of so many to fight antisemitism, and an occasion to rethink the best business models for 2022 and beyond. Forward-thinking organizations like Federation are finding success by quickly adapting business models and staying ahead of the curve. In doing this, Federation can rely on its many strengths including: the strength and depth of community leadership, a strong balance sheet, and our ability to act as convener to leverage resources and partnerships. These strengths are critical as we continue to work with others to push back against antisemitism and demand accountability from institutions like the Ottawa-Carleton District School Board. While we wish it were otherwise, combatting antisemitism continues to be a core aspect of our agenda.

The vision for the Jewish Superhighway – meaningful Jewish experiences and Jewish journeys, with no one left behind, remains relevant and appropriate for Jewish Ottawa. However, what has shifted are some of the means to achieve this vision, emerging needs in the community, and the overstretched bandwidth of many (organizations and individuals). Federation has fundamentally shifted our engagement strategies away from large-scale, profile-building events. Instead, we are focused on the development of niche events and building on the successful microgrants model to boost engagement. Federation will capitalize on the yearning for meaningful connection, while also using technology to include those who might not otherwise be able to participate.

This year’s business plan is focused on leveraging relationships and the areas where Federation is uniquely positioned to add value. It also demonstrates continued bravery in ceasing activity in areas with a more limited Return on Investment (ROI). For example, activities like the Campaign Kick-Off and formal annual reports are on pause as Federation continues to focus on delivering efficient and high-quality value for the community.

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.

Specific Communication Initiatives

1. Increased use of video to better explain Federation to the community (minimum 3 new videos).
2. To better reach a younger demographic, expand Federation’s reach on Instagram by 35%.
3. Implement a Humans of Federation campaign on social media.

Stay focused on (initiatives in past years that remain critical): make data-driven decisions (and cease any initiatives with a limited ROI), collection of email addresses to expand reach, ask partners to help amplify our message, and segment communication initiatives for particular groups.

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

Specific People Strengthening Initiatives

1. Enhanced efforts to recruit new and diverse volunteers by implementing a minimum of 2 new initiatives, resulting in a minimum of 20 new volunteer placements (e.g. volunteer “ads” in Shabbat messages).
2. Increased training for leaders and boards of all community organizations with a minimum of 3 sessions organized on topics most relevant for current times and with structured opportunities for relationship building between organizations.

Stay focused on (initiatives in past years that remain critical): Federation employee engagement based on Leading Edge survey results and J-Fellows as a leadership pipeline into community activism for young adults.

Strategic Plan Objective #3: Strengthening Community Supports

Specific Initiatives to Strengthen Community Supports

1. Maintain a 3rd year of emergency funding to assist with food insecurity.
2. In 2019, Federation implemented the successful Jewish Jumpstart program to incentivize memberships at the Soloway Jewish Community Centre and Synagogues. Develop a new Jewish Jumpstart program to boost enrolment in supplementary schools, which will be implemented in time for the 2023/24 academic year.

Stay focused on (initiatives in past years that remain critical): fighting antisemitism with a particular focus on the Ottawa Carleton District School Board and continued participation in National Truth and Reconciliation efforts.

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

Specific Fundraising Initiatives

1. Together with our partners the Ottawa Jewish Community School and Torah Day School of Ottawa secure a minimum of \$15M in new pledges for the **Generations Trust Campaign for Jewish Education**.
2. Successful participation in Year 3 of the Life & Legacy initiative, including formalizing at least 50% of all previous Letters of Intent.

Stay focused on (initiatives in past years that remain critical): Build on the success of last year’s monthly donors pilot program by doubling the number of monthly donors.

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

Specific Engagement Initiatives

1. Build on the micro-communities approach begun last year, focused on specific groups with shared interests, and create opportunities to engage people in Jewish life (minimum 5 micro-community events).
2. Leverage the PJ Library program to drive participation in other community organizations (e.g. synagogues, camps, SJCC, and schools) through programming (minimum 4 events organized by partners).
3. Launch the Jewish Journeys Strategic Funding stream, building new on-ramps to the Jewish Superhighway for deeper community experiences.
4. Implement changes to agency program funding agreements, by including the goal of attracting 15% new participants to programs funded by Federation.

5. Re-imagine Federation's efforts to engage the Emerging Generation. This includes hiring a new professional and implementing a strategic plan.

Stay focused on (initiatives in past years that remain critical): successfully allocate a minimum of \$70,000 in microgrants.

What does success look like?

In developing this business plan, members of the Federation team and board engaged in Q-Storming sessions - rather than start with strategies and potential solutions, the team began with questions. Questions included:

What does the Jewish community need from Federation at this particular moment in time?	How has Federation kept pace with the change of technology?
How has COVID impacted Federation's long-term strategic plan?	How has the Israel/Diaspora relationship changed over the years?
Is all engagement equal?	Are we doing enough to promote Federation?
Are there things that are no longer priorities, less relevant or someone else can do them?	Can our decision making continue to evolve by better understanding impact and decision making?
How to maintain strategic funding in a tough economy?	What is the impact of the current economic situation on our ability to fundraise?
How do we measure progress?	Are there opportunities to leverage technology?
What is the impact of the economy in achieving our goals?	Are we doing enough to move from 1-time engagement to deeper experiences on the Jewish Superhighway?
How can we build better/more partnerships (Jewish and non-Jewish)?	What are the new unmet needs in the community and are there gaps in services?
How best to fight antisemitism?	Are people burned out?

In this spirit, Federation will be successful if:

- We continuously challenge assumptions, take time to evaluate the ROI of long-standing activities and be forward thinking and unafraid to make thoughtful change.
- At least 80% of the initiatives in the Year 4 Business Plan are achieved.
- Despite challenging economic times, the Annual Campaign continues to support needs today, while Life and Legacy and the Generations Trust will secure our community's future.

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