



JEWISH FEDERATION OF OTTAWA

2020 STRATEGIC PLAN



According to management guru, Michael Porter:

*“Sound strategy starts
with having the right goal.”*

Strategic planning is critical to all organizations and provides a blueprint for how boards govern and how professionals manage. In Federation’s case, this aspirational plan is for both the organization and our entire community.

This strategic plan will ensure that our community thrives through these principles:

Meaningful Jewish journeys.

Vibrant Jewish life.

No one left behind.



Process

In November 2018, the Board of Directors of the Jewish Federation of Ottawa formed a strategic planning committee led by Michael Polowin and Nikki Shapiro, with the active support of committee members Stacy Goldstein and Jessica Greenberg and Federation professionals Sarah Beutel and Andrea Freedman.

The committee met between November 2018 and May 2019, and reported to the Board of Directors. From February to April, the committee held consultations with diverse stakeholders to solicit input and test hypotheses. This feedback was invaluable in drafting the plan and a summary is contained in Appendix A*. The Jewish Federation of Ottawa's Board of Directors approved the strategic plan in June 2019.

A short history of Federation Strategic Plans

- In 2003, Federation adopted a plan focusing on governance, process and delivery of services and later changed its name from the Jewish Community Council of Ottawa/Vaad Ha'Ir to the Jewish Federation of Ottawa.
- In 2007, a symposium identified five strategic objectives to guide the organization's efforts and funding decisions.
- In 2012, Federation identified seven objectives to meet the evolving needs of the community.
- In May 2014, Federation approved a new five-year strategic plan with five goals: increased financial resources, allocations, partnership, engagement in Jewish life, and volunteers.

Guiding principles

- In 2018, Federation introduced the Jewish Superhighway: meaningful Jewish experiences and journeys, where Jewish life is meaningful and no one is left behind. The 2020 strategic plan focuses on bringing this vision to fruition.
- The strategic plan will be supported by an annual business plan with specific initiatives and targets. The business plan will be approved and made public every September.
- It is important that outcomes are measurable and that the community receives reports.
- When the last strategic plan (2014-2019) was created, an excellent mission, vision, core values, corporate principles were approved that remain relevant and hence were not changed, with one exception: adding the word *welcoming* to the vision statement. Ensuring that community is welcoming is key to increasing engagement levels.

Community Consultations

Successful strategic plans are crafted specifically for their current environment and take into account: challenges, opportunities, where the organization is at that moment in time, and where it needs to go to execute its vision.

Accordingly, the committee prioritized consulting with the community and with specific stakeholders. More than 270 people participated in seven consultations.

Many ideas, viewpoints and strategies were expressed. This feedback has been collated and analyzed for consistent themes and thoughts and has been used extensively to shape the final plan.

* See Appendix A at the end of this document. A full summary of feedback can be found in Appendix B, available online at jewishottawa.com/giving/reports under Community Impact listing.



This strategic plan describes how the Jewish Federation of Ottawa will help lead our community to a thriving Jewish life.

A Jewish Superhighway with many on-ramps to engagement, access to Jewish life for more people, and a sustaining cycle where a vibrant community continuously reinvests in itself.

This **cycle of success** represents the work required for a flourishing future - where there are meaningful experiences and Jewish journeys; where Jewish life is vibrant and no one is left behind.



"How wonderful it is that nobody need wait a single moment before starting to improve the world."

- Anne Frank

The Jewish Superhighway's Cycle of Success

Build
community
capacity



20% increase in
fundraising revenue,
and major endowment
for sustainable
Jewish education



Partial shift
to strategic
funding



Our goal:
20% increased
Jewish engagement



Meaningful Jewish journeys.
Vibrant Jewish life. No one left behind.

Build Community Capacity

Enhance the Jewish Federation of Ottawa's capacity to build Ottawa's Jewish Superhighway.

Objective: 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.

Why this is important: Federation was established in 1934, and has been a strong and active community presence for over 85 years. At the same time, Federation's impact is multi-faceted and not easy to explain in a sound bite. For Federation to continue raising the bar and propel the community forward, more and more people require a deeper understanding of its work.

How will we know if we are successful? Reaching more people with a clear message that resonates is a necessary foundation to achieving other goals in the plan, such as a 20% increase in engagement (qualitative and quantitative) and financial resources. Accordingly, annual business plans will contain clear initiatives around communication strategies and will measure their effectiveness.

Objective: Optimize a strong and vital pipeline of professionals and volunteers who will lead the process of change.

Why this is important: The strength of any organization lies with its people. It is extremely important that Federation attracts, trains and retains a strong professional team to implement the bold goals in the strategic plan. Additionally, Federation has a responsibility to support volunteer identification and training for ourselves and other communal organizations, and to serve as an important resource for others through extensive reach and emphasis on diversity.

How will we know if we are successful? The measure of success for this objective is qualitative. We will know that the best possible people to lead change are in place, when the desired outcomes of the strategic plan are achieved.

"We are worth what we are willing to share with others."

- Rabbi Jonathan Sacks

Objective: Strengthen valuable community supports

The Jewish Federation of Ottawa adds value and leverages resources in countless ways. As in the past, Federation will consistently look for ways of improving efficiencies and effectiveness and working with partners to address gaps in the community.

Advocate for community and its interests:

Federation will continue to advocate for community locally and with all levels of government, and to work with communities across Canada and with partners in Israel.

Provide first-rate community services:

Federation will continue to manage the Ottawa Jewish Community Campus (serving thousands daily); provide crisis management, and bring the community together in times of need; preserve the history of our community through the Ottawa Jewish Archives; ensure that Jewish journeys take place in safety and security, and so much more.

Offer outstanding programming that increases engagement:

Federation will continue to leverage networks to bring programs such as PJ Library, Birthright Israel, and March of the Living to Ottawa. This is in addition to local offerings such as Mitzvah Day and Jewish Jumpstart (a program to incentivize new memberships to synagogues and the Soloway Jewish Community Centre).

Support community organizations to fulfill their missions:

Federation will continue to work, often behind the scenes, to support agency initiatives, help overcome challenges and provide guidance and assist community agencies in their work.

Build strong relationships with Israel:

Federation will continue to strengthen our bond with Israel through Israel experiences, and to build strong people-to-people relationships through programs such as Shinshinim and Partnership2Gether (P2G).

Convene and encourage partners on big picture challenges:

In our community consultations for the strategic plan and through on-going conversations, we heard concerns about the need for a Jewish high school and the challenge of political and denominational polarization. Federation will continue to work with partners to ensure the future vibrancy and cohesion of our community.



20% Increase in Fundraising Revenue, and Major Endowment for Sustainable Jewish Education

With enhanced capacity, Federation leads change to build the Jewish Superhighway.

Objective: 20% increase in fundraising revenue, including establishing the largest endowment for sustainable Jewish education in Ottawa's history.

Why this is important: Fundraising is a means to an end. The objective is to raise more money for the Jewish Superhighway and fulfill Federation's mission and vision. The Annual Campaign remains the lifeline of our Jewish community and growth is necessary each and every year to ensure the community's highest priority needs are met.

At the same time, Federation will work with donors according to their philanthropic passion, including for example, supplementary gifts or a legacy gift to the Ottawa Jewish Community Foundation.

Although already investing significant resources, the biggest current gap in community funding is in the realm of Jewish education. This gap is difficult to meet through annual fundraising, and can best be addressed through a significant endowment that will help fund Jewish education in perpetuity. Federation, along with the Foundation as a trusted partner, will help support the fundraising efforts to secure endowments and legacy gifts¹ for both the Ottawa Jewish Community School and Torah Day School, while also simultaneously working independently to support a communal endowment fund for both schools.

It is estimated that an endowment of approximately \$25 Million is required for sustainability and this will only be achieved over time. Other Jewish communities, such as Montreal and Toronto, have identified a similar path and are at various stages of planning and execution, so learning and strategy can be shared.

How will we know if we are successful? Increased funds are available to support the four outcomes of the Jewish Superhighway: Jewish experiences; Jewish education; helping the vulnerable; and safety and security.

"When you set aside part of your income for the purpose of charity, you are not losing money. Rather you uplift the money and yourself to greater heights."

- Rabbi Menachem Mendel Schneerson

1. A cornerstone of the Foundation's new strategic plan is participation in the Harold Grinspoon's Foundation's Life and Legacy program. A hallmark of the Life and Legacy program is partners working together to secure legacy gifts.

Partial Shift to Strategic Funding

Objective: Increase strategic funding for the Jewish Superhighway outcomes; 15% shift in allocations to strategic funding.

Why this is important: The organizational funding the community has provided through Federation to our beneficiary agencies remains core to our agenda. Federation funding is a lifeline to so many and “mission critical” for the community. At the same time, the delivery of services has changed over time, as has Jewish engagement. In order to be able to achieve our mission and vision, the funding process must adapt to be more personalized, responsive and nimble to meet strategic needs.

How will we know if we are successful?

There is a minimum 15% shift in funds to strategic funding. While operational funding will continue, there will also be consistent funding for new projects, ideas, and approaches (e.g. Jewish Jumpstart, microgrants).

Promote a Welcoming and Inclusive Community

Objective: Promote a welcoming and inclusive community.

Why this is important: The poet Maya Angelou once said “people will forget what you said, people will forget what you did, but people will never forget how you made them feel.” To promote a welcoming community, a multi-faceted approach is required. This includes everything from how you greet people at the door, to how affordable the program/activity is, to marketing Jewish Ottawa as an attractive place to live.

How will we know if we are successful? The incredible diversity (e.g. geography, language, denominations, LGBTQ, etc.) of our community is reflected in a 20%+ increase in Jewish engagement. Accordingly, annual business plans will contain specific outreach initiatives, such as microgrants for programming to engage a diverse population. Additionally, an initiative such as the Net Promoter Score will be used to gauge perception on welcoming and inclusivity.

In Genesis 18, 1-8, Abraham and Sarah model excellence
for how to create a welcoming community, including
“Let me bring you some water; bathe your feet and rest under the tree.”

20% Increased Jewish Engagement

A vibrant Jewish Superhighway.

Objective: 20% increase in Jewish engagement on the Jewish Superhighway.

Why this is important: An active and busy Superhighway translates into a flourishing, virtuous and self-sustaining cycle. The more we engage people, the greater our communal success becomes as each person brings new people onto the highway. Each person shares, contributes, supports, inspires and enriches the lives of others, as well as our institutions.

How will we know if we are successful:

We will use quantitative and qualitative measurements to determine Jewish engagement. Examples of quantitative measures include: enrolment in Jewish schools, synagogue memberships, Jewish membership at the SJCC and Ottawa Jewish summer camp enrollment; as well as the number of programs offered in the community (based on E-News).

Examples of qualitative measures include: results from the new strategic funding model survey and PJ Library family participation survey.

The first business plan will contain the starting point for this calculation and the criteria used will be applied consistently in subsequent years.

Imagine

The year is 2025. The Jewish Superhighway is heavily travelled and we have achieved a virtuous cycle of success.

An increase in engagement and education ignites dynamism. Organizations flourish and resources grow, establishing self-sustaining pathways of involvement and support for those who need it.

Every new journey begins with a first step.

Federation plays an invaluable role through a myriad of community supports

People – strong and dedicated professionals and volunteers are required to lead the process for change.

To be successful, our community and Federation must increase resources and optimize the use of every dollar.

And we know that to increase engagement, we need to welcome people and celebrate community diversity.

Appendix A - Seven Consultations

Six in-person community consultations were held, as well as one online consultation.

February 28 Federation staff	March 4 Community-wide consultation	March 6 Leadership of community organizations	March 19 Board of Directors, Jewish Federation of Ottawa	March 27 Emerging Generation	April 23 Federation top donors
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Community feedback and how it is reflected in the plan:

Feedback

There is not sufficient understanding of Federation's brand, unique value-add, and how funds are allocated.

Where this is reflected in the plan

Objective in the plan: Increase and deepen understanding of what Federation does and funds to communicate our value as a trusted Jewish leader with unique leverage and influence.

Example: The annual business plan will contain clear initiatives around communication strategies and their effectiveness.

More work is needed to create the welcoming and inclusive community we aspire to be.

Objective in the plan: Promote a welcoming and inclusive community. The incredible diversity (e.g. geography, language, denominations, LGBTQ, etc.) of our community is reflected in a 20%+ increase in Jewish engagement.

Examples: The annual business plan will contain specific outreach initiatives such as microgrants for programming to engage a diverse population; a tool such as the Net Promoter Score will be used to gauge perception on welcoming and inclusivity.

Leverage scarce resource through partnership and Federation adding new supports for community organizations.

Objective in the plan: Strengthen valuable community supports.

Example: Federation will continue to work, often behind the scenes, to support agency initiatives, help overcome challenges, provide guidance, and offer support to assist agencies in their work.

There is a need for more and diverse programming for people of all ages.

Objective in the plan: Achieve a 20% increase in Jewish engagement through diverse programming.

Example: Federation's Jewish Experiences Microgrant program will allow individuals and agencies to create diverse programs to meet previously unmet needs. Additionally, Federation will use technology to outreach and leverage connections and drive participation.

There is concern around the "big" issues affecting our community, such as the high cost of Jewish living, Jewish education, and denominational differences and perceived access to resources, etc.

Objective in the plan: Strengthen valuable community supports, which will include convening and encouraging partners on big picture challenges.

Example: The high cost of Jewish living will be tackled in different ways, including working with day schools to establish a significant endowment for sustainable Jewish education.

MISSION

To advance and promote an exceptional quality of Jewish life

VISION

A thriving Ottawa Jewish community that is welcoming, 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



Building meaningful Jewish journeys where **no one is left behind.**

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