

Jewish Federation of Ottawa

Strategic Plan 2014-2019



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“The only thing that is going to save mankind
is if enough people live their lives for something or
someone other than themselves.”
—Leon Uris

Jewish Federation of Ottawa Strategic Plan 2014–2019

VISION

Every great organization needs an inspirational vision to guide its actions and focus. The strategic plan is a road map to take Federation from where it is today to where it needs to be.

The Jewish Federation of Ottawa, building on its distinguished 80-year history as the heart of Jewish life in the nation's capital, has created such a vision to move the community forward.

"Be bold" was the key message that Federation kept hearing throughout its strategic planning process, which included community consultations with a wide spectrum of stakeholders. With this simple yet powerful message in mind, the new mission, vision, core values and corporate principles were created.

The community is clear in its desire that Federation needs to focus on outcomes driven by innovative and forward-thinking leadership. The feedback from the public consultations inspired the direction necessary to effectively outline Federation's five priority goals with measurable targets, to be achieved by 2019.

This plan focuses Federation's efforts on five priority goals over a five-year period. At the same time, ongoing functions of the organization will continue. These would include areas that define Federation as the central address for Jewish needs in Ottawa that require the attention and response of the organized Jewish community.

Federation professional staff will be developing detailed work plans to start implementing this strategic plan as of July 1, 2014, and are committed to reporting back to the community on a regular basis on its progress in achieving the stated goals.

Ultimately, this is not a plan for the Federation, but Federation's plan for the community. Through the successful execution of this plan, Federation strives to benefit both Jewish organizations and individuals in Ottawa.

focus

GOALS

Importance of Strategic Plans and History

Strategic planning is critical to any non-profit organization: it sets the tone for how board members govern, how professionals manage, how funds are raised, how lay leaders and staff are evaluated by the community, and how change and growth happens.

The committee began the current strategic planning process by seeing what it could learn from past Federation strategic plans. In 2003, a plan focusing on governance, process and delivery of services was adopted and led to the changing of the organization's name from Vaad Ha'Ir to the Jewish Federation of Ottawa. In 2007, a Federation symposium identified five strategic objectives to guide the organization's efforts and funding decisions. In 2012, seven new strategic objectives were identified to meet the evolving needs of the community.

"No individual can be constructed entire
without a link with the past."
- Achad Ha'am

change

Overview of the Strategic Planning Process

In the summer of 2013, Steven Kimmel, Chair of the Jewish Federation of Ottawa, asked Linda Kerzner, Vice-Chair and incoming Chair of Federation, to lead a process that would result in a new and invigorated strategic plan to set the tone for the community. The strategic planning committee that was subsequently struck including Steven Kimmel as well as Debbie Halton-Weiss, past Chair of Federation, and Federation board members Lauren Bronstein, Mike Shahin and Jason Shinder. The committee was professionally staffed by Andrea Freedman, President and CEO of Federation, and Bram Bregman, Vice-President of Community Building of Federation.

The committee first met in early October 2013 and embraced the process as an opportunity to build community, generate positive energy, and earn the confidence of the various stakeholders. The intent of the resulting strategic plan is that it would be meaningful, enhance the influence and impact of Federation, and create positive change through the achievement of its goals and targets.

In November and December 2013, the committee drafted, for discussion purposes, a new mission statement (what is the purpose of Federation), vision statement (what the community looks like in five years), list of core values (how to conduct itself based on guiding principles), and six goals (which activities are of most value and how is success measured). In January and February of 2014, the committee conducted eight community consultations to reach a large and diverse audience of Jews in Ottawa:

- Two for Jewish organizations in Ottawa (funded and non-funded agencies and synagogues)
- One for people who serve on a Federation committee or the board
- One for top donors
- One for the emerging generation (anyone in their 20s or 30s)
- One for Federation staff
- Two open to the entire community

130 people attended the eight sessions. The committee asked Michael Walsh, a professional facilitator, to lead the consultations, and he generously offered to donate his services.

Following the community consultations, feedback from all eight sessions was compiled into a 42-page document. The committee made significant changes to the draft mission, vision, core values and goals based on the feedback, including eliminating one of the six goals. Further, the committee began to add measurable targets for each goal with the intent to report back to the community on its progress.

Participants of the consultations were then invited to a follow-up session in March to see how their feedback was incorporated. A five-page summary document of the cumulative feedback was posted to Federation's website in advance of this session, and copies of the full feedback document were available at the session. 35 people attended the follow-up session and provided further feedback.

In April and May of 2014, the committee finalized the strategic plan. It was ratified by the Federation board on May 21, 2014, and presented to the community at the Federation AGM on June 18, 2014. This was not the end of the strategic planning process, but rather the beginning of developing work plans and reporting mechanisms for its five year implementation.



Current Environment

Undertaking a strategic planning exercise is a difficult task as it must incorporate current trends and realities within the Jewish world. There are statistics across North America that shows a decreasing level of Jewish affiliation and membership in organizations and synagogues, and Ottawa is not immune from it. Within Ottawa, common concerns include Jewish day school education, engaging the next generation, the high cost of Jewish living, dynamic adult programming and assisting the growing population of seniors. The philanthropic world is facing its challenges as donors today want more choice and directed giving, and fewer funds are being channeled towards Jewish causes despite the needs being greater than ever. Concurrently, the Ottawa Jewish community has an incredible spirit of care, commitment, and unity that is unsurpassed. Many young Jews move to Ottawa to work in politics or the government, or to attend law or medical school. Most impressively, Ottawa has a strong core group of volunteers who dedicate themselves to maintaining a flourishing Jewish community. All of these factors were considered by the strategic planning committee as they embarked on this plan.



New Mission, Vision, Core Values & Corporate Principles

One of the aims of the strategic planning process was to update the mission of Federation as well as to create a vision statement, list of core values, and corporate principles. The community consultations resulted in several recommendations:

- The mission statement should be short and poignant
- The vision statement should emphasize the importance of being open, welcoming and non-judgmental
- Initially, the core values included the corporate principles, but the consensus was that Federation had to distinguish between its core Jewish values, which make it unique, and its operational standards, which guides its activities

MISSION

To advance and promote an exceptional quality of Jewish life

VISION

A thriving Ottawa Jewish community that is 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

Goals & Measurable Targets

Through the Jewish Federation of Ottawa's strategic planning consultations, five goals were established, each containing specific targets that are bold and measurable. These goals are designed to strengthen Federation and the entire Jewish community of Ottawa. This strategic plan addresses the most pressing issues where Federation's skills and abilities are best suited to strengthen community.

Each of the goals will be achieved over the next five years, and completed with the conclusion of the fiscal year ending June 30, 2019.

THE FIVE GOALS ARE:

1. **Increase financial resources to support the Jewish communities of Ottawa, Canada, Israel and the world**
2. **Manage and communicate a transparent and responsible process to allocate funds from the Annual Campaign**
3. **Foster greater cooperation and partnership among community agencies and organizations**
4. **Expand involvement and engagement in Jewish life and learning, for all ages**
5. **Attract and develop diverse volunteers and leaders**

Each of the goals, including measurable targets, is explained in more depth in the following pages.

* The Centre for Jewish Philanthropy includes: holistic, year-round conversations with donors to understand what is important to them and then discuss any of the following giving vehicles – annual campaign, special projects, endowment and legacy giving.

GOAL 1

Increase financial resources to support the Jewish communities of Ottawa, Canada, Israel and the world

The fundraising landscape is complicated. Challenges include donor fatigue, a desire for greater choice and growing competition (Jewish and non-Jewish causes). Ambitious fundraising targets are needed to meet communal needs and new approaches are required to excite, inspire and motivate donors.

MEASURABLE TARGETS FOR GOAL 1 TO ACHIEVE BY 2019

1. In partnership with the Ottawa Jewish Community Foundation, Federation will:

- ✓ Grow the Annual Campaign each and every year
 - ✓ To support Jewish life, increase fundraising significantly by 2019 leading to a minimum of 25% more annual dollars available through multiple giving mechanisms including the Annual Campaign, supplemental giving opportunities, corporate sponsorships, and foundations directing annual disbursements to local Jewish causes & Israel-based charities
- CURRENT..... 2014 NUMBER: \$5.9M TOTAL**
- \$4.2M from 2014 Federation Annual Campaign (estimate)
 - \$1.5M from 2013 Ottawa Jewish Community Foundation disbursements to Jewish charities in Ottawa and Israel
 - \$0.2M from Other (golf tournament, corporate sponsorships, etc..)
- TARGET..... 2019 NUMBER: \$7.38M TOTAL (25% over 5 years)**

2. The emerging generation represents the future of our community. It is critical to engage this cohort in Jewish life while instilling a spirit of philanthropy. Federation will:

- ✓ Increase the dollars raised by the emerging generation division of the Annual Campaign by 30% each year
- CURRENT..... 2014 NUMBER: \$15,000 (Estimate)**
TARGET..... 2019 NUMBER: \$55,700
- ✓ Double the number of annual donors in the emerging generation division of the Annual Campaign by 2019
- CURRENT..... 2014 NUMBER: 120**
TARGET..... 2019 NUMBER: 240

3. In 2013, the Ottawa Jewish Community Foundation and Federation created the Centre for Jewish Philanthropy - an innovative, donor-centric approach to fundraising. Building on this initial effort, the goal is to deepen the fundraising relationship with the Foundation and consistently enhance The Centre for Jewish Philanthropy's * effectiveness and scope. Based on donor interests, additional dollars will be raised for local, Israel and overseas needs. Federation will:

- ✓ Perform an annual evaluation of the Centre for Jewish Philanthropy to ensure it is effective in meeting donor needs and increasing dollars available to the Ottawa Jewish community and Israel

4. Federation will explore new models of giving within the Annual Campaign that balance donor choice with the community's highest priority needs. Federation will:

- ✓ Conduct research, present options for consideration by the Board, and if appropriate, implement a pilot project with measurable objectives

GOAL 2

Manage and communicate a transparent and responsible process to allocate funds from the Annual Campaign

Funds from the Annual Campaign are the lifeline of our community and sustain our community's most vulnerable and disadvantaged members while supporting Jewish education and community building. Federation recognizes the importance of demonstrating how dollars donated are distributed to meet community priorities to ensure that campaign funds are maximized and that Federation is providing first-rate stewardship of dollars for donors.

MEASURABLE TARGETS FOR GOAL 2 TO ACHIEVE BY 2019

1. In consultation with key stakeholders, including beneficiary agencies, Federation will:

- ✓ Conduct a comprehensive review of our grants and allocations process and implement and evaluate a new model, based on best practices, for the fall 2015 application process
- ✓ Re-examine the formula used to determine allocations within the education envelope and present options for consideration by the Board, and if appropriate, implement the changes
- ✓ Ensure that agencies have a complete understanding of the criteria used to make funding decisions by implementing a minimum of three new strategies to improve transparency with agencies (e.g. published criteria)

2. An important aspect of ensuring a transparent process is excellent communication. Reporting outcomes to the community regarding decisions and effectiveness of grants is essential, and also educates individuals on the value of Federation and supporting it. Federation will:

- ✓ Develop a minimum of three new tools to share funding decisions and outcomes with the community (e.g. allocation decisions in the Ottawa Jewish Bulletin), as well as Federation's national and international financial contributions and their impact

"Without unity, there is nothing."
- Aaron David Gordon

communicate

GOAL 3

Foster greater cooperation and partnership among community agencies and organizations

By working together, we can accomplish more and make the best use of limited resources. Federation, in its role as a broker of services and as a convener, has a key role to play in forging community partnerships. This applies to both funded and non-funded Jewish organizations and synagogues.

MEASURABLE TARGETS FOR GOAL 3 TO ACHIEVE BY 2019

1. To significantly increase opportunities for Jewish organizations to work together, Federation will:

- ✓ Offer a minimum of three new joint initiatives that directly benefit Jewish organizations in Ottawa (e.g. professional development, shared purchasing, etc.)
- ✓ Create two new forums to share ideas, disseminate information and explore opportunities for cooperation (e.g. rabbis, agency presidents, etc.). There are currently two primary Federation forums that bring together Jewish professionals (supplementary school task force and quarterly meetings of agency executive directors)

2. According to the latest census data (2011), our population of seniors 65+ has grown by 25% as a percentage of Ottawa's overall Jewish community since 2001. This group of 1,600 individuals is diverse in terms of needs and interests. Accordingly, Federation will:

- ✓ Explore new models of cooperation and partnership to address the growing needs of seniors in our community (e.g., housing, transportation, etc.)



SHARE

GOAL 4

Expand involvement and engagement in Jewish life and learning, for all ages

Engaging Jews in what is personally meaningful to them is the foundation and the lifeblood of our community. Ottawa offers a plethora and a diverse menu of Jewish and Israel-related opportunities to connect and educate oneself. Federation believes in the importance of Jewish education for our children to ensure a brighter future, as well as continuing our focus from recent years on the emerging generation. Simultaneously, there is a need to ensure vibrant Jewish programming for adults, including, but not limited to, volunteering opportunities (Goal 5) and addressing the needs of seniors (Goal 3).

MEASURABLE TARGETS FOR GOAL 4 TO ACHIEVE BY 2019

1. There is an abundance of first-rate educational options for Jewish youth in Ottawa, many of which are not fully subscribed. Federation will:

- ✓ Initiate a community-wide endeavour to increase the number of children receiving a Jewish education (day and supplemental) by 35% by 2019

CURRENT..... 2014 NUMBER: 680

TARGET..... 2019 NUMBER: 918 (35% over 5 years)

- ✓ Initiate a community-wide endeavor to increase the number of local Jewish youth and students engaged in informal Jewish experiences (Israel trips, youth groups, Ottawa summer camps) by 20% by 2019

CURRENT..... 2014 NUMBER: 776

TARGET..... 2019 NUMBER: 931 (20% over 5 years)

Note: for measurement purposes, Federation is including partner agencies only, but all initiatives to grow Israel trips, youth groups, or summer camps will be open to all local Jewish organizations *

2. There is a communal need to secure additional financial resources to lower financial barriers to participating in Jewish life. Federation will:

- ✓ Create a program that increases affordability for families considering a Jewish experience (e.g. lower tuition for ADK, low introductory membership rate at synagogues, Jewish camping, etc.)

3. As a convener, Federation programming efforts should focus on community-wide efforts. Federation will:

- ✓ Initiate a minimum of two new community building activities (eg, joint synagogue program)
- ✓ Introduce two new shared marketing initiatives (eg, Passover in Ottawa flyer, active community calendar, etc.)
- ✓ Implement one new Israel engagement project to connect the local Jewish community to the history, culture and people of Israel

4. The community consultations strongly showed the need to create a more welcoming and inclusive Jewish community. Federation will:

- ✓ Strive for greater diversity of people participating in Federation events, boards and committees
- ✓ Use inclusive messaging (e.g. Federation tag-line emphasizing inclusion as a goal, language, choice of images, etc.) to brand Federation as being open and welcoming
- ✓ Increase the number of people being reached with our communication channels (social media sites, Ottawa Jewish Bulletin, bi-weekly newsletter, etc.)

GOAL 5

Attract and develop diverse volunteers and leaders

Volunteers are precious resources who require nurturing and attention. As a broker of services, Federation, in unity with local agencies, plays a key role in identifying, training and appreciating volunteers and leaders on behalf of the entire community.

MEASURABLE TARGETS FOR GOAL 5 TO ACHIEVE BY 2019

1. Many people want to volunteer but don't know where to start. Federation will:

- ✓ Create an active matching program that pairs volunteers with needs in the community. Through individual meetings and by maintaining a list of opportunities, we will place a minimum of 100 volunteers or 20 volunteers annually.

2. To renew energy to honour and thank a broad spectrum of volunteers (in terms of roles and also desire for recognition), Federation will:

- ✓ Implement a minimum of two annual initiatives to appreciate those who give of their time to local Jewish causes (e.g. annual supplement in the Bulletin highlighting volunteers)

3. Engaging and developing leaders through a continuum of leadership programs is essential for the future of our Jewish institutions. Federation will:

- ✓ Initiate a minimum of one annual volunteer or leadership program on a rotating basis (e.g. leadership engagement program, high-level leadership training for senior volunteers, etc.)

"Make the most of yourself by fanning the tiny, inner sparks of possibility into flames of achievement."

- Golda Meir

* 2014 measurement includes -
Youth Groups: NCSY 175, BBYO 39;
Camps: Camp Bnai Brith 116, SJCC day camps 364;
Israel trips: March of the Living 24, NCSY 7,
Birthright Israel 41 and Chabad Student Network 10.



Next Steps & Reporting to the Community

The next step for Federation is for its staff to develop clear work plans and concrete strategies to achieve the goals over the next five years.

Some goals may be met by Year 1, and some by Year 5, but each and every one of them will be accounted for.

There will be comprehensive reports to the community twice per year, primarily through Federation's Key Performance Indicators (KPIs – a series of quantifiable measures to gauge performance of an organization). The KPIs will align with the measurable targets set forth in this document so that all stakeholders can see how Federation is progressing through its strategic plan.



"Setting an example is not the main means of influencing others; it is the only means."
- Albert Einstein

Conclusion

Imagine the year is 2019. The quality of Jewish life in Ottawa is exceptional. The community – built on the cornerstones of inclusiveness, accessibility, education and engagement – is thriving. Jewish organizations are working together on common agendas, while Jewish schools are experiencing growth and are centres of excellence. Youth and adults are taking part in meaningful Jewish experiences in increasing numbers, and seniors and the vulnerable feel well looked after through a variety of options and services afforded to them. Volunteers from a broad spectrum contribute their skills and energy. Communal needs are better met through a rise in charitable dollars. Jews from all backgrounds and walks of life feel welcome.

In one word: **community**. It is why Federation exists and why this strategic plan matters. This entire process was fuelled by the contributions of countless members of the Ottawa Jewish community. Feel proud, we did this together!

Our community will thrive through Federation working in partnership with each and every Jewish member to advance and promote an exceptional quality of Jewish life in Ottawa. Ultimately this will be a Jewish community that we will all proudly call home.

Supporting documents used as background material to create this strategic plan can be found at www.jewishottawa.com/strategicplan.

This includes the following appendices:

*SWOT Analysis; Ottawa Jewish Community's Demographics;
Federation Strategic Plans for the Past 10 Years; and,
Feedback Summary from Community Consultations.*

JEWISH FEDERATION OF OTTAWA

BUILDS
Community



HELPS
the Vulnerable



EDUCATES
Jewishly



SUPPORTS
Israel



doing good
Together

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