

Ottawa Jewish Community Foundation 2015 Business Plan



Mission: The Ottawa Jewish Community Foundation provides donors the vehicles to contribute to the long term financial stability and support of the needs of the agencies which serve the Ottawa Jewish Community. The Foundation acts as a steward for these gifts and links the past, the present and the future while building trust with everyone we serve.

Introduction

In 2014, the Foundation's board of directors approved a new [5-year strategic plan](#). The strategic plan contains many important initiatives in the Foundation's 3 pillars (governance, education and outreach and fundraising) and they are all designed to answer one basic question: how can we generate more revenue (fundraising and stewarding capital)?

1. [The overall objective of the Foundation is to secure \\$5 Million in new capital from fundraising and 40 new legacy commitments by 2018.](#) As such, the 2015 business plan primarily focuses on annualizing the 5-year goals contained in the strategic plan.
2. On an annual basis the Foundation strives to [achieve a minimum annual return of 7%](#) for the Foundation's portfolio.

New this year, the business plan contains a high-level evaluation of the [2014 business plan goals](#).

EDUCATION AND OUTREACH

High-level 2014 evaluation:

1. **New website:** [a new website](#) was launched and there were several timely and specific tribute card promotions. There is currently a challenge in that the website cannot accept tribute card promotions (e.g. buy 5 get 1 free) on-line.
2. **Develop and implement year-round communication touch points with donors** – this goal was exceeded, and although there was improvement in agency thank you letters, this remains a work in progress.
3. **Work on greater customization in donor communication** – despite best efforts, this goal has not yet been accomplished.
4. **Develop greater relationships with [funded agencies](#)** (top 10) – in part, this was accomplished through thank you letters, the [video project](#) and through partnership with [Federation](#).

2015 Goals:

- 1) Minimum pipeline of 150 potential donors is maintained.
- 2) One new marketing initiative promoting living legacies.
- 3) One new initiative co-branding Federation and Foundation.
- 4) Minimum 4 [donor touch points](#) (e.g. newsletter) and development of a plan for a 5th touch point.
- 5) Minimum 1 customized communication and 2 low-cost experiments on how to increase response rates (e.g. note on the envelope).
- 6) Minimum 1 marquee event (e.g. in 2014, the event was [Pearls of Wisdom](#)).

- 7) Launch of planned giving handbook, with a minimum 2 small events (tentative pending completion of the handbook).

GOVERNANCE

High-level 2014 evaluation:

1. **Examine increasing the [board's](#) size for 2014/2015** (with a view to adding philanthropists and community leaders) – while the size of the board remained the same, new members include philanthropists and community leaders.
2. At [board meetings](#), **plan sessions to further develop the board's level of expertise** (e.g. agency presentation, learning about giving vehicles, etc.) – this was accomplished with an appropriate mix of learning as 75% of meetings contained a learning component.
3. **Review current [committee structure](#) and make appropriate recommendations** – a formal review was not conducted, but changes were made, including merging the B'nai Tzedek and fundraising committees.
4. **Engage past leadership** (e.g. invitations to board meetings, serve on committees, gatherings of past chairs, etc.) – this was accomplished through invitations to board meetings, receiving all materials and some past leaders serving or chairing committees.

2015 Goals:

1. Complement the Foundation's [mission statement](#) with an appropriate vision and values statement developed and approved by the board.
2. One new initiative to enhance the Foundation's culture of transparency and accountability.
3. Ensure the composition of the Board of Directors is diverse and comprised of philanthropic leaders by adding 2 new members (specifically, more women and philanthropic leaders are needed).

FUNDRAISING

Pipeline and Prospect Development

High-level 2014 evaluation:

1. **Develop a robust pipeline of prospects** (minimum 125) - this was accomplished as the pipeline grew from 26 to 125.
2. **Encourage face-to-face meetings** – while the metrics for face-to-face meetings was not attained, significant progress was made over the previous year.
3. **Marquee annual events** – the Pearls of Wisdom event successfully took place once again and discussions on the power breakfast continue, however, there is not yet agreement on what the event ought to look like.
4. **Form and establish Professional Advisory Council (PAC)** – the committee was formed, has been meeting regularly and is working on an exciting product in the gift planning handbook.
5. **Always look for vehicles in which to promote giving** (e.g. participate in International Giving Tuesday program) – this was partially accomplished through legacy month and promotions with the Federation. More work is still needed.
6. **Specific initiatives (B'nai Tzedek, Legacy Giving, Lion of Judah, Tribute cards, and the Centre for Jewish Philanthropy)** – as reflected in the overall deliverables regarding fundraising targets, with revenue below expectations, not all initiatives were implemented this year. In some cases (e.g. tribute cards), even when all the specific deliverables were achieved, revenue still not did increase.

2015 Goals:

1. Raise a minimum of [\\$1 Million](#) (excluding CEC commitments, realized legacy commitments and new unrealized legacy commitments).
2. Secure a minimum of 8 new [legacy gifts](#), with a minimum estimated value of \$500,000.
3. Obtain a minimum of 5 new living-legacy commitments.
4. [Women's Collective](#) endowment raises an additional \$25,000 and is responsible for adding 25 new prospects to the pipeline.
5. Minimum 15 [new endowment funds](#) (includes [B'nai Tzedek](#), living legacy, [agency funds](#), etc.).
6. Minimum of 130 face-to-face meetings by professionals and volunteers (cultivation and stewardship).
7. Deepen the fundraising relationship with the Federation and consistently improve on a donor-centric approach to fundraising.
 - a. Centre for Jewish Philanthropy metrics are met or exceeded.

Conclusion

Building on the great vision and foresight of the Foundation's [founders](#) and the hard work of previous leaders, with focused efforts, success is within our grasp. Success means that the Foundation will have an enhanced ability to meet immediate needs while securing a bright future for subsequent generations

What does success look like?

2015 Key Deliverables

	Action Item	2015 Minimum Deliverable
Active Prospect Development	Prospects on Pipeline (people and agencies)	150
	Face to face meetings	130
	Professional Advisory Committee	2 small events
Fundraising	New \$ Contributed Into Foundation Tribute Cards , new funds, new \$ into existing funds, etc. Does not include CEC contributions or realized legacy gifts	\$1 Million
	New Endowments New funds, living legacy (5 funds), agency B'nai Tzedek, etc.	15
	New Legacy Commitments	8 new gifts, minimum estimated value \$500,000
	Centre for Jewish Philanthropy metrics are met	80%
	Women's Collective	Raises \$25,000+, add 25 prospects to the pipeline
Education & Outreach	Marquee event	1
	Communication touch points , including 1 customized and development of an appropriate 5 th touch point, 2 experiments improving response rates	4
	New marketing initiatives (1 promoting living legacies and 1 co-branding with Federation)	2
Governance	New initiative to improve transparency and accountability	1
	Board Composition	2
	Vision and Values statement approved	Board approved