

Ottawa Jewish Community Foundation Strategic Plan 2014-2018

INTRODUCTION

Since 1971, the [Ottawa Jewish Community Foundation](#) has pursued its mission to “**provide donors with the vehicle 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 for all involved. The Foundation strives to be the charity of choice for fulfilling donors’ philanthropic wishes.

The goal of the Foundation’s most recent strategic plan, 2009-2014, was to increase the overall profile of the Foundation so that there was more community involvement and growth in the Foundation’s capital base with a two-fold objective:

- 1) Mobilize and inspire volunteer participation in the Foundation’s activities; and
- 2) Increase the number of donors by 100 and raise \$10 Million in new capital.

While falling short of the \$10 Million in new capital goal, more than 100 new donors were added, as were numerous volunteers.

The Foundation also took great steps to become a leading example of a well-governed organization, which includes having a sound investment policy. Furthermore, major strides were made (and continue to be made) at building a closer relationship with the [Jewish Federation of Ottawa](#) – through the Collaborative Fundraising Model and its subsequent evolution as the Centre for Jewish Philanthropy.

Due to the structural work done and the current base of supporters and volunteers, the Foundation is exceptionally well-positioned for the next five years. This new strategic plan (2014-2018) is ambitious, bold and contains measurable objectives.

The strategic plan outlines objectives in each of the Foundation’s three pillars: **Governance** (formerly board development), **Education & Outreach** (formerly marketing) and **Fundraising**. While the objectives are important in each of the pillars, they are all designed to answer one basic question: how can we generate more revenue (fundraising and stewarding capital)?

This strategic plan envisions a multi-faceted approach to fundraising. On an annual basis, the Foundation develops a [business plan](#), with specific targets that allow us over time to achieve the overall objectives contained in the strategic plan, as well as articulate the specific initiatives required to do so.

<p>The overall objective of the Foundation is to secure \$5 Million in new capital from fundraising and 40 new legacy commitments by 2018.</p>

GOVERNANCE OPTIMIZE INTERNAL CAPACITY

The last 10 years has seen the Foundation institute thoughtful policies and procedures to both better guide decision making and ensure transparency and accountability. The Foundation is a professional, well-governed body that is exceptionally worthy of support. Our aim now is to ensure that our governance activities fully support the fundraising mission of the Foundation.

Objective #1 - Complement the Foundation's [mission statement](#) with an appropriate vision and values statement developed and approved by the Board.

Objective #2 - The composition of the [Board of Directors](#) should be diverse and comprised of philanthropic leaders in our community (e.g. gender balance, age and philanthropic leaders).

Objective #3 – Achieve a minimum annual return of 7% for the Foundation's Portfolio by adhering to the board approved investment [policy](#).

Objective #4 – Maintain and enhance the Foundation's important culture of [transparency and accountability](#).

Much work has already been done in this area (e.g. [annual business plans](#) and [board minutes](#) are on the web). Nonetheless, a minimum of three new initiatives in this area should be added (e.g. investment evening for fund holders).

EDUCATION AND OUTREACH **GROW THE DONOR BASE**

Education and outreach efforts are focused on contributing to fundraising and stewardship efforts.

Objective #1 – A minimum pipeline of 150 potential donors is consistently maintained.

The pipeline can be developed through a variety of mechanisms, including events.

Objective # 2 – Owing to relatively new government legislation, promote the Foundation’s ability to solicit “[living legacy gifts](#).”

Minimum one annual outreach or marketing initiative, in addition to face-to-face discussions.

Objective #3 – Progress in co-branding between the Foundation and Federation in order to truly become the Centre for Jewish Philanthropy in Ottawa, with a focus on current and potential donors.

Minimum one new annual initiative (e.g. joint video, annual report, etc.)

Objective #4 – Enhance communication with donors

Minimum five annual touch points

FUNDRAISING AUGMENT GIVING

The Foundation has almost \$51 Million in assets (as of December 31, 2013) and another \$5.5 Million expected through previously pledged Community Endowment Campaign commitments. There are also 140 deferred gifts with an estimated value of \$23.6 Million.

With the growing needs of seniors, newcomers, the vulnerable; coupled with the ever-increasing demand to provide excellent Jewish education for the various facets of the community – there is increasing pressure on the Foundation and Federation’s [Annual Campaign](#) to raise additional resources. Furthermore, there are always new, unforeseen or unanticipated needs that emerge given the fast and ever-changing complexity of our community.

Objective #1 - Raise a minimum of \$5 Million¹.

[Tribute cards](#), [endowments](#), [Women’s Collective Philanthropy Program](#), [B’nai Tzedek](#), etc.

Objective #2 - Secure a minimum of 40 new legacy commitments with a minimum estimated value of \$2.5 Million.

[Insurance, Wills and Bequests](#)

Objective #3 –Obtain a minimum of 20 new living-legacy gift commitments.

Objective#4 - Minimum of 125 new donors to the Foundation (*all giving vehicles*)

Objective #5 - Deepen the fundraising relationship with the Federation and consistently improve on a donor-centric approach to fundraising.

Centre for Jewish Philanthropy metrics are met or exceeded (to be measured on an annual basis).

¹ This figure is exclusive of CEC commitments, realized legacy commitments and new unrealized legacy commitments.

CONCLUSION

Pirkei Avot contains sage wisdom for the Foundation.

For our donors: "If I am not for myself, who will be for me? And when I am for myself, what am I? And if not now, when?" (Avot 1:14).

For our [volunteers](#) and [leadership](#): "It is not incumbent upon you to complete the work, but neither are you at liberty to desist from it." (Avot 2:21)

For our community: "The day is short, the labor vast, the toilers idle, the reward great and the Master of the house is insistent." (Avot 2:20). We have set an ambitious fundraising goal because there is no alternative – together with the Federation, the Foundation has a responsibility to meet the needs of our community's most vulnerable members while investing in Jewish education and Jewish life.

Building on the great vision and foresight of the Foundation's [founders](#) and the hard work of previous leaders, success is within our grasp. Today's multitude of [giving vehicles](#) available to donors will lead to growth - expanding the Foundation's immediate ability to meet needs, while securing legacy gifts to ensure an even brighter future for subsequent generations.