



**OTTAWA JEWISH
COMMUNITY FOUNDATION**

2011 OJCF BUSINESS PLAN





2011 Business Plan

OJCF MISSION

The Ottawa Jewish Community Foundation provides donors 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 with everyone we serve.

Adopted November 23, 2006

Executive Summary

Founded in 1971, far-sighted community members Bernard Shinder, Gilbert Greenberg and the Vaad Ha'ir (now known as the Jewish Federation of Ottawa) Executive Director Hy Hochberg saw the need for a financial resource to maintain the community's fiscal structure and safeguard its future. This new organization would also be a means to perpetuate the name of a person or a family and link it to the community forever.

First known as the Ottawa Jewish Community Endowment and Bequest Foundation, its name was changed in 1982 to the Ottawa Jewish Community Foundation (OJCF). The Ottawa Jewish Community Foundation (OJCF) is a unique community organization, acting as the sole foundation possessing the ability to positively impact and influence the growth and development of the overall Ottawa Jewish community.

OJCF IN 2011

Within the context of the current challenging economic realities and philanthropic marketplace, the Foundation's Board of Directors have assumed a strategic approach to our operations that allow us to maximize the potential impact the OJCF has on our community.

As part of the ongoing strategy to be seen as a leading philanthropic option for the Ottawa Jewish community, the OJCF has committed to creating annual business plans, ensuring that detailed plans are established to help us reach our long term goals and objectives, much of which is represented in our 5-Year Strategic Plan which was created and approved in 2008.

To achieve the goals that have been recognized as critical to the ongoing success and growth of the OJCF, we must be seen as a cutting edge, reliable and transparent organization. Certain overarching principles have been assumed as integral to the ways in which our short- and long-term activities and objectives are accomplished, including the assurance that we maintain meaningful relationships with our donors and continue promoting transparency and accountability.

The main sections of the OJCF 2011 Business plan focus on three distinct areas of concentration, all of which are integral to the advancement of the ongoing OJCF mission. These categories are broken down as follows:

1. Fundraising
2. Marketing, Education & Outreach
3. Board Development

Highlights of these sections include:

- Review of specific efforts undertaken by the committee charged with overseeing multiple fundraising projects, activities, and ideas
- Capitalize on the encroaching intergenerational transfer of wealth
- Develop plans re: family philanthropy services
- Engage the younger demographic of philanthropists
- Continue the promoting of integrated and collaborative fundraising efforts between OJCF and JFO
- Create and sustain meaningful relationships with current and potential donors.
- Engage teens and their families in meaningful acts of Tzedakah
- Engage, educate and empower women to become engaged philanthropists
- Develop relationships with community agencies and partners, cultivating funding opportunities to address legacy giving
- Create opportunities to personally engage niche groups as potential donors and supporters of the OJCF
- Elevate OJCF brand-recognition to the community at large
- Honor donors who have given or promise to make a gift for the future of our community
- Enhancing our digital tools to help us better respond to the needs of our donors (both current and prospective)
- Create and enhance opportunities and support for board members' ongoing education and leadership development

FUNDRAISING

Increasing the impact that the Ottawa Jewish Community Foundation (OJCF) has within our community has been a deciding factor in the initiatives and projects we have undertaken over the past few years. As community needs continue to grow, we are simultaneously faced with the challenge of competing non-profit organizations that attract donors from the same donor pool. Offering multiple ways to connect to these donors will further our ability to engage them in meaningful ways, leading to eventual and greater financial support for our community's programs and agencies.

As part of the overall directive to increase our outreach and fundraising capabilities, the OJCF has begun to explore ways to incorporate new and/or enhanced programs to meet our fundraising goals. Without renewed philanthropic support and goals, the Jewish community's efforts to sustain Jewish life and identity are in danger of floundering. How we adapt to a changing philanthropic landscape can quite simply determine the shape of tomorrow's Jewish community.

The following committees, initiatives and programs are designed to help us achieve these goals:

i. FUNDRAISING COMMITTEE

The establishment of a committee to focus efforts on fundraising has been an essential component of the OJCF's plans to help us meet the strategic objective of raising an additional \$2 million per year for the OJCF through 2013 (See addendum 1 for specific targets & deliverables), as set out in the 5-Year Strategic Plan. This currently active committee will focus specific energies on increasing actual/realized gifts, compared to deferred gifts.

The Fundraising Committee is charged with assuming the primary responsibility for overseeing the organization's overall fundraising efforts, while also focusing on ways to increase awareness and elevate the presence of the OJCF to the community at large. Personally connecting to our community members and donors (current and future) is a key piece of OJCF's strategy, and the creation of this committee is an important piece of this goal.

ACTIONS:

1. Promote and advance current fundraising projects, activities, and ideas
2. Implement necessary sub-committee systems to successfully carry out fundraising events and activities
3. Promote the various ways by which donors can create and/or feed existing funds, focusing on cutting-edge tax relief mechanisms
4. Work with the marketing committee to help elevate OJCF brand-recognition to the community at large
5. Build upon the notion of artful philanthropy, ensuring donors are able to connect their philanthropy to projects that have personal and emotional resonance

ii. INTERGENERATIONAL TRANSFER OF WEALTH / FAMILY PHILANTHROPY SERVICES

The fundraising world is undergoing rapid and permanent changes driven by technology, the need to attract new donors, and by the evolving behavior of different generations of philanthropists. Different generations learn about, engage with and donate to charitable organizations in many different ways, and it is essential that OJCF prepare and develop relevant strategies to properly engage the emerging generation of philanthropists.

We are approaching the largest transfer of wealth in the next 10-20 years. There is potential for several millions of dollars to be transferred in the Ottawa market, and we will undoubtedly be met with increasing competition for these resources. The ways in which the newer generation gives to their philanthropic choices and preferences is not necessarily the same as their parents and grandparents, and they tend to be more focused on personally connecting with their philanthropic endeavors. Studies show that while the majority of dollars raised / donated may still come from the older generations, the actual number of donors in the younger generations is growing, and will soon outpace their parents and grandparents.

As we further explore the much-discussed and studied inter-generational transfer of wealth, we will need to enhance the value of the OJCF to our community and cultivate philanthropy with the “next generation” of donors (30-50 year olds). The OJCF needs to develop ideas to engage families by offering targeted initiatives with the goal to ensure the continuation of support for the Jewish community.

ACTIONS:

1. Increase volunteer outreach structure to meaningfully engage next generation donors and non-board members in committees where they can help solve organizational problems
2. Ensure appropriate giving options are developed for the emerging generation
3. Educate professional advisors about OJCF as a possible option for relevant families
4. Develop plans re: family philanthropy services and seminars, including relevant materials, events, etc.
5. Foster the development of affordable and relevant technological tools to better engage the younger demographic of philanthropists
6. Create programs focusing on parents of next generation donors to secure gifts before the intergenerational transfer of wealth occurs
7. Create opportunities to cultivate, involve and educate the various generations together and/or apart, addressing family values, philanthropy planning and the impending intergenerational transfer of wealth focusing on innovative and effective ways in which charitable dollars may be utilized
8. Access outside resources and actively participate in projects addressing strategies to engage next generation and family philanthropy (ex: 21/64 Foundation’s Multigenerational Family Philanthropy forum)

iii. COLLABORATIVE FUNDRAISING MODEL

Focusing on the development of a more effective way of fundraising to support Ottawa's Jewish community, the Collaborative Fundraising Model (CFM) has been initiated within the context that the donor base supporting the Jewish community receives numerous requests while making contributions in a number of different ways (annual campaign, foundation or special fundraising initiative).

The CFM program is designed to show greater respect for each donor, ensuring they are not overwhelmed with requests while helping them best determine the most meaningful ways by which they would like to support the Jewish community by matching donors to their directed giving and interests

The initial connection between strategically recognized donors and their donor relationship manager (DRM) have been started, and they are designed to become the primary point of contact with the donor in all matters related to the Jewish community including their philanthropic giving. The CFM is designed to meet donors' personal objectives, engaging and inspiring them to increase their philanthropy and support worthy community priorities. The recently drafted "menu of opportunities" – created with the help of the Jewish Federation of Ottawa – is a significant tool to foster meaningful conversations regarding these supplemental giving opportunities.

ACTIONS:

1. Continue to refine the program in direct consultation with JFO and relevant committee structures (ex: Resource Development Committee; CFM Task Force)
2. DRM's will personally engage prospective donors in conversations regarding the possible increase in their philanthropic giving to the Jewish community
3. Continue to develop and market donor opportunities in conjunction with the Jewish Federation of Ottawa's planning mechanism
4. Solicit donor prospects identified as appropriate for the CFM
5. Recruit strategically appropriate volunteers from UJA canvasser list and offer CFM-directed education re: planned giving options in advance of Campaign 2012
6. Develop materials to provide targeted education & training for select number of professional staff DRMs and volunteer canvassers re: planned giving options

iv. B'NAITZEDEK PROGRAM

As part of the overall initiative to increase OJCF outreach and fundraising capabilities, we have begun ways to explore the enhancement of the Saul and Edna Goldfarb B'nai Mitzvah Club, expanding it from a subset of the Marketing & Communications committee mandate to a full-fledged committee and program of the OJCF. A reenergized program would provide us with the ability to engage the teen population and their parents in more meaningful acts of Tzedakah, furthering our ability to expand OJCF's reach into the Jewish community of Ottawa. If done successfully, this outreach project has the potential to impact current and future giving patterns.

ACTIONS:

1. Creation of a lay committee - involving adult advisors and B'nai Mitzvah fund holders to promote and recruit for the project
2. Gather and share best practices and examples from similar teen-oriented programs in other communities and organizations (ex: Jewish Teen Funders Network)
3. Recruit group of B'nai Tzedek ambassadors / teen chairs to work alongside the committee
4. Engage teens, parents and/or committee members to speak at schools, synagogues, etc. for recruitment purposes of families and teens
5. Hold appropriate events for the teens involved, engaging them in philanthropic education and community events (eg: Mitzvah Day)

v. WOMEN'S PHILANTHROPY

Jewish women are becoming increasingly prominent in the world of philanthropy, distributing wealth they accumulate, inherit, or share with current spouses. Developing strategies to foster the engagement of women as active philanthropists remains a priority of the OJCF, directly stemming from the overall increase and importance of women in the general world of philanthropy. Our goals are to engage, educate and empower women to become engaged philanthropists and catalysts for change.

Women's philanthropy enables Jewish women to connect with other women through the funding of projects that directly benefit or are of great importance to women in the Jewish community. Through the creation of a "Women's Collective Endowment Fund" (WCEF), we are designing a program to be accessible to everyone who feels connected to and supportive of women and family-specific issues. This initiative is designed to use the power of collective philanthropy to nurture and maintain a systemic difference in the status of women and children.

ACTIONS:

1. Create a pooled fund that can address and provide support for women (and children)-specific causes
2. Develop targeted philanthropy services and seminars, including relevant materials and special events (financial planning seminars, speakers)
3. Create opportunities to informally cultivate, involve and educate this demographic in OJCF activities

vi. CREATE A JEWISH LEGACY / BOOK OF LIFE

"Create a Jewish Legacy" (CJL) is conceived as both a fundraising and community public awareness campaign designed to help individuals and families support the Jewish causes they care about, as well as the overall Ottawa Jewish community. The program is designed to help us build a strong and vibrant community now and for the future via planned giving options and establishing permanent endowments. The CJL program promotes the message that everyone has the ability to make a difference in the lives of future Jewish generations –

not just those with greater wealth, as is often the misconception regarding planned giving. Additionally, a legacy plan can be created at any stage of life, further eliminating barriers that may exist in younger donors' minds.

The CJL program allows us to publicly recognize not only current and committed fund-holders and donors associated with the OJCF, but it also allows us to expand our connection to members of the community who choose to pledge their commitment to us today regarding their intent to support us in the future. This manner of support will enable us to reach a wider - and potentially younger - segment of the philanthropic marketplace, as legacy development can offer a longer gestation period before an actual gift has to be paid out, making the commitment a more palatable one for many people.

The development of a CJL program allows us to further develop relationships with our community agencies and partners, as we cultivate funding opportunities and programs that would be addressed via legacy giving. Based on best practices taken from other communities' experiences, an initial outreach to synagogues will be focused on as the first phase, to be expanded in the coming months.

Potential demographic candidates for the CJL program can be taken from all age-ranges and economic strata within the Ottawa Jewish community, including:

- o Retired OJCF Board members
- o Current and past Annual Campaign top donors
- o Community agency board members
- o Synagogue congregants
- o Retirees
- o Former members of the Ottawa Jewish community now living outside Ottawa

Designed as an effective donor stewardship project, the BOOK OF LIFE is a perfect project to accompany many of the OJCF fundraising, outreach and marketing initiatives. Signatories can be people who actually have made a pre-existing donation or bequest to OJCF, as well as people who are prepared to publicly state their intent to do so at a future date.

The intent of the BOOK OF LIFE initiative is to honor donors who have given or have promised to make a gift to the OJCF for the benefit of the beneficiary agencies and to help meet the future needs of the community.

ACTIONS:

1. Develop a program centered around community members' consideration to leave at least 1% of an individual's estate, identifying individuals to cultivate and canvass for estate gifts
2. Create focused campaigns and materials to help meet the long-term financial planning needs of individual institutions and agencies
3. Work with the boards of local Jewish organizations, agencies and synagogues in advocating the CJL strategy
4. Launch BOOK OF LIFE initiative and develop a recognition program,
5. Define strategies for inclusion of relevant/appropriate fund holders, donors, legacy pledgers, etc. as potential signatories

6. Develop appropriate designs and formats for the Book of Life (ex: hard copy, digital format, etc.)

vii. PARLOR MEETINGS

OJCF needs to create opportunities to personally engage niche groups as potential donors and supporters of the OJCF, which includes holding at least four (4) invitation-specific parlor meetings per year. Hosting parlor meetings with these potential new donors will also provide us the opportunity to enhance the Board and committees' profile in the community via the delivery of OJCF-related presentations to various community organizations.

The parlor meetings will provide support for other initiatives discussed in the 2011 Business Plan, as they can be directed towards the various niche groups (ex: emerging generation) while also providing support for the special campaigns (ex: CJL) and overall marketing and branding needs to elevate exposure of the OJCF.

ACTIONS:

1. Plan and hold parlor meetings to cultivate, involve, educate and canvass the various niche-markets and groups
 - a. CEC Phase 2 potential donors
 - b. 2nd generation members of top donor families
 - c. Leadership of communal Jewish organizations (synagogues, etc.)
 - d. Board members' peers
 - e. Women philanthropists / donors
 - f. Financial, legal and estate planning professional advisors

<u>MARKETING</u>

Marketing and brand-building is increasingly important for nonprofit foundations and organizations as it is for major corporations and companies. While the goals of nonprofits are generally more focused on community development, social issues and donor connections compared to the for-profit world, the benefits of branding are virtually identical. In either circumstance, we want our organization to be understood and supported by a specific group of people willing to sustain and build upon it with their discretionary funds and resources - ie: their philanthropic dollars.

Conversely, the very nature of nonprofit organizations gives us an advantage in creating a brand that has the ability to resonate with donors on a deeper and more personal level.

In order to prioritize the committee's agenda and available resources, it was felt that the following items should remain the primary focus this year:

- o Develop a comprehensive strategy for improving OJCF's branding and visibility

- o Focus initial activities on current donors by developing appropriate tools to actively reach out and engage this population, capitalizing on the need to show appreciation for existing donors (it was noted that current donors who are properly engaged could also be effectively used to attract new donors)

The following areas of focus are designed to help us achieve these goals:

i. BRANDING & COMMUNICATION

Chief among the priorities for 2011 is the need to properly define and elevate our brand while increasing our visibility to the community at large. At the same time, we need to better communicate with our current donors as well, to keep them connected with their funds' activities and efficacy, boosting their knowledge of - and confidence in - the OJCF as a center for philanthropic excellence. In order to remain relevant, the OJCF needs to conduct ongoing research regarding changing trends in philanthropy and marketing, creating related branding efforts in direct response to the ever-evolving landscape.

ACTIONS:

1. Develop a comprehensive plan for improving OJCF's branding and visibility
2. Create directed marketing efforts using the OJCF website, newspaper ads, lawn signs, etc.
3. Explore ways to engage community members, donors and multiple demographics via assorted platforms (ex: questionnaires for feedback on OJCF activities & programs sent with annual statements; online updates and surveys)

ii. OUTREACH & EVENTS

Connecting personally with individuals and groups is a cornerstone of engagement strategies, in order to create and sustain meaningful relationships with current and potential donors. Successful outreach efforts will allow us to better explain how the OJCF is different from other organizations (i.e what sets us apart from others), while providing us with various platforms to promote the multiplicity of services we offer to better promote long-term and meaningful philanthropic choices and activities.

Additionally, we shall explore the development of programs designed to utilize existing donors to attract new donors.

ACTIONS:

1. Plan and host co-sponsored events with targeted groups and / or organizations (ex: Women's Division, YAD, synagogues)
2. Promote an increased presence of the OJCF at community events
3. Engage professional advisors with meaningfully-targeted events (ex: investment trends seminars)

4. Create OJCF marketing presentation to use at meetings with donor families beyond Ottawa (ex: Toronto, Florida)
5. Develop programs for current donors which allow us to show appreciation for their commitment and foresight (ex: “Art of Giving” event)

iii. WEBSITE / E-COMMUNICATIONS

Trends indicate an increase in and rapidly growing dependence on electronic communications as a means of obtaining and exchanging information and engaging in an individual’s and organization’s daily business practices, including purchases, paying bills and giving to charitable organizations. Enhancing our digital tools (such as the website) and directing / driving traffic to them via enhanced marketing efforts can help us better respond to challenges within the philanthropic marketplace and better meet the needs of our donors (both current and prospective).

While the recently revamped website has increased our ability to offer increased direct access to the OJCF, there are further improvements that can be made to enhance its effectiveness to meet the increasingly savvy demands of our donors who want the information in more responsive ways when and how they want it – and no other medium has the capacity to meet those needs the way electronic / digital communication does.

ACTIONS:

1. Explore new features to further personalize the website for individual donors
2. Develop incentive programs for donors to visit the website and make donations online
3. Develop personalized e-communications plans to reach specifically segmented populations (ex: specialized e-blasts; affinity specific e-newsletters)
4. Create strategies to enhance donors’ online connections with OJCF (ex: online event sign-up, collection of email addresses, tribute cards and donations)

<u>BOARD DEVELOPMENT & EDUCATION</u>

Boards of Directors of nonprofit / charitable organizations have long been seen as serving essential purposes and performing critical agency functions. Given the extent of time, investment and responsibility the Board provides it is reasonable to devote significant efforts to ensure they receive ongoing development opportunities and support to effectively serve their terms as Board members and committee chairs.

The following areas of focus are designed to help us achieve these goals:

i. BOARD EDUCATION

Volunteers need to feel valued and supported, and fulfillment of expectations, such as the chance of learning new skills, will help keep volunteers motivated. With rising demands,

expectations and requirements given to Board members, the importance of continuous education and development can not be dismissed, as Board members are looking for an impactful and meaningful experience, and ongoing education further allows their connection to be a positive one.

ACTIONS:

1. Implement a variety of options for continuing board education (ex: speakers; conference call seminars; retreats/conferences)
2. Develop and share a resource library of board education-related materials and tools (ex: articles; web-based presentations)
3. Develop strategies to further enhance board meeting agendas and experiences

ii. MENTORSHIP & SUCCESSION PLANNING

Properly preparing new board members for full participation on the Board is a crucial step in the Board recruitment process. An active mentoring program provides a system of support for incoming Board members that will help integrate them with returning Board members, while helping to expedite new Board members' knowledge of the organization and current activities.

Nonprofit organizations rely on strong leadership to pursue their missions. Establishing succession planning as part of the Board's overall development shows a commitment to long-term planning, enhancing the effectiveness of the Board as appropriate preparations can ensure a smooth transition of leadership, preventing the loss of momentum for any specific committee and /or the Board itself.

Mentorship programs and succession planning will be increasingly important in future years, as the board sees increased turnover following our recently enacted restructuring plan. As such, these programs will be focused on the new Board members who will be elected in June 2011.

ACTIONS:

1. Develop a strategic succession plan for board and committee members, creating an expectation that successful terms in a particular office will provide an individual an opportunity to advance to a next level
2. Offer special training for new committee chairs re: setting targets, developing annual strategies, etc.
3. Revise OJCF Board orientation for new members

iii. BOARD OF ADVISORS

Advisory boards can provide Boards with knowledgeable advice and organizational history. An experienced and well-connected board of advisors can help with the development of OJCF fundraising goals, as they have the capacity to instill credibility with long-standing donors and peers.

ACTIONS:

1. Integrate past chairs as part of our fundraising team, focusing on legacy and bequest-based giving
2. Coordinate bi-annual gatherings of past chairs / presidents for update and advice-gathering purposes

Addendum 1: OJCF 2011 Business Plan Measurables & Deliverables

	Action Item	Minimum deliverables
FUNDRAISING TARGETS	Annual CFM active relationships	20
	Volunteer DRM recruited	4
	Parlor meetings	4
	CJL partnerships	4
	B'nai Tzedek gifts	20
	Face-to-face OJCF canvasses	30
	Money raised re: new gifts	\$500,000
	Money raised re: deferred gifts	\$1,500,000
MARKETING & COMMUNICATIONS TARGETS	Newsletters	3
	Co-sponsored events	3
	Directed donor communiqués	2
BOARD EDUCATION TARGETS	Board-directed education seminars	5
	Self-assessment surveys	2

Addendum 2

OJCF 2011 Business Plan Action Items Timeline

OJCF 2011 Business Plan Fundraising Timeline

	Fundraising / CFM	Intergenerational Transfer of Wealth / Family Philanthropy services	Niche Market Fundraising (Women’s Philanthropy, B’Nai Tzedek, CJL)
January	Assess and create needed subcommittees	Create Family Philanthropy Services program & collateral	Women’s philanthropy launch event Create A Jewish Legacy – synagogue meetings
February	Initiate face-to-face program re: securing new donors Recruit volunteer DRM	Target next generation giving opportunities and design connecting collateral	B’nai Tzedek families parlor meeting Launch Women’s Collective Endowment Fund Confirm Book of Life project /committee chair /
March	Revisit CFM donor list for edits /additions CFM Task Force Meeting	Professional advisors event 1	Start CJL canvassing program / visits Book of Life committee meeting (confirm launch date; develop & design physical & online version)
April	Launch program centered on the creation of new funds Education session for volunteer DRMs	Contact next generation donors for engagement on OJCF committee structure	Launch CJL-program re: 1% estate gifts Start recruitment of inaugural Book of Life signatories
May	“CEC- Phase 2” parlor meetings	Next generation parlor meeting 1	B’nai Tzedek presentation in schools
June	Revisit/ update CFM menu of opportunities		Women’s philanthropy parlor meeting
July			Finalize Book Of Life signatories list
August			
September			B’nai Tzedek families parlor meeting
October	Initiate contact program to promote the feeding of funds before year’s end CFM Task Force Meeting	Professional advisors event 2	Launch BOL / inaugural event
November		Next generation parlor meeting 1	
December		Florida-based Family Philanthropy Services program / parlor meetings	

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Marketing, Education & Outreach Timeline

	Branding & Communications	Outreach & Events
January	Launch comprehensive branding / marketing campaign for increasing OJCF visibility 2011 Lawn Signs	
February	Revamp OJCF brochures & flyers Revisit website & e-communications tools and capacity	
March	Winter Newsletter Donor questionnaire re: feedback on OJCF activities & programs (online)	
April	Passover holiday communications piece to fund-holders / donors	OJCF Day
May	OJCF Focus group Finalize Annual Report	Co-sponsored event (ex: Women's Division, YAD, synagogues)
June	Summer Newsletter	Annual General Meeting
July		
August		OJCF Co-sponsored event (ex: Women's Division, YAD, synagogues) Ensure OJCF presence re: UJA Campaign Launch
September	High Holiday communications piece to fund-holders / donors	
October		OJCF Co-sponsored event
November	Fall Newsletter	
December	2012 lawn sign campaign	

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Board Development & Education Timeline

	Board Education	Mentorship & Succession Planning
January	Map out annual Board education strategy (ex: speakers, seminars)	Develop strategic succession plan for Board and committee members Draft Board mentorship program
February	Investment conference	
March	Annual Board retreat	Revise new board member orientation session
April	Board of Advisors meeting	Evaluate & update job descriptions for Board members, committee chairs & committee volunteers
May	Delivery of OJCF-related presentations to various community organizations CJL Conference	Distribute Board self-assessment survey
June	Distribute job descriptions to Board members, committee chairs and committee volunteers (following AGM) Mid-year review of 2011 Business Plan	Conduct exit interviews with retiring board members New board orientation session
July		Launch 2011/2012 mentorship program Offer special training for committee chairs re: setting targets, developing annual strategies, etc.
August		Collect & interpret annual Board self-assessment survey
September	Start annual review of 2011 Business Plan	
October	Board of Advisors meeting Final review of 2011 Business Plan / Draft 2012 Business Plan	
November	Finalize 2012 Business Plan	
December		