

Our future is in your hands



**OTTAWA JEWISH
COMMUNITY FOUNDATION**



2012 OJCF 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 2012

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, allowing us to maximize the impact the OJCF can have 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 2012 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:

- The ever-growing desire of donors to look for personal relationships and accountability from the nonprofit organizations they support
- The need to offer multiple ways to connect to both our current and potential donors
- Promote legacy and bequest giving within the greater Jewish community
- Ensure appropriate giving options are developed for the emerging generation
- Position OJCF as a primary philanthropic venue for individuals and families.
- Promote women's philanthropic options via engagement, education and empowerment
- Proactively engage Jewish philanthropy in regards to the inter-generational transfer of wealth
- Fostering a truly collaborative approach to Jewish philanthropy in Ottawa by working seamlessly with the Jewish Federation of Ottawa and its Annual Campaign structure
- Enhanced marketing, brand-development and communications strategies can significantly help elevate donors' awareness and comfort with non-profit organizations
- Donors want to feel connected to the organizations they support and utilizing updated technological tools has the ability to increase connections to the OJCF, increasing the ways in which we show appreciation for existing donors
- Outreach events have proven to be effective in furthering the reach and image of the OJCF
- Board development and education continues to positively impact volunteers' experiences as Board members and committee chairs

FUNDRAISING

Fundraising has always been about understanding what motivates donors to give. In the past, many donors' relationships with the fundraising organizations they traditionally supported was based on history and / or a sense of "tradition".

However, today's reality is reflected by an ever-growing desire of donors to look for personal relationships and accountability from the nonprofit organizations they support. In this new environment, it is essential for the OJCF to ensure meaningful connections are made with our donors, increasing the impact that the Ottawa Jewish Community Foundation within our community.

Offering multiple ways to connect to both our current and potential 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. Making personal connections with donors, potential donors and a variety of target groups will help us better understand donors' true motivations and characteristics, which in turn will enable the OJCF to effectively increase our ability to steward our fundraising potential and capabilities.

Not all donors engage with our organization in the same way, resulting in our need to utilize multiple channels.

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

1. FUNDRAISING COMMITTEE

- Promote and advance OJCF fundraising projects, activities, and ideas and engage in follow up strategies with potential donors
- Promote the various ways by which donors can create and/or feed existing funds, focusing on cutting-edge tax relief mechanisms
- Build upon the notion of meaningful philanthropy, ensuring donors are able to connect their philanthropy to projects that have personal and emotional resonance
- Work with the marketing committee to help elevate OJCF brand-recognition to the community at large

2. WOMEN'S PHILANTHROPY

- Increase awareness of and involvement in the Women's Collective Endowment Fund (WCEF)- a pooled fund that can address and provide support for women and children-specific causes
- Develop targeted philanthropy services and seminars, including relevant materials and special events (financial planning seminars, speakers)

- Create opportunities to informally cultivate, involve and educate this demographic in OJCF activities
- Promote the overall of concept of women's philanthropy through the tenets of engagement education and empowerment

3. Collaborative Fundraising Model (CFM)

- Help facilitate the integration of the CFM process into the Jewish Federation of Ottawa (JFO) Annual Campaign, promoting CFM education to all appropriate canvassers and divisions
- Continue to refine and promote the CFM program in direct consultation with JFO and relevant committee structures (ex: Resource Development Committee; CFM Task Force, planning department, etc)
- Recruit strategically appropriate volunteers from UJA canvasser list and offer CFM-directed education to be used as part of the Annual Campaign canvassing cycle
- Develop materials to provide targeted education & training for the professional staff and volunteer Donor Relationship Managers (DRM) re: planned giving options, to personally engage prospective donors in conversations regarding possible increases in philanthropic giving
- Actively solicit donor prospects identified as appropriate for the CFM, focusing on planned and supplemental giving opportunities

4. B'nai Tzedek

- Continue to enhance and develop the volunteer committee regarding B'nai Tzedek canvassing and engagement, ensuring all appropriate families are contacted in a timely fashion
- Engage teens, parents and/or committee members to speak at schools, synagogues, etc. for recruitment purposes of additional families and teens
- Hold appropriate events for the teens involved, engaging them in philanthropic education and community events (eg: Mitzvah Day)
- Recruit group of B'nai Tzedek ambassadors / teen chairs to work alongside the committee
- Gather and share best practices and examples from similar teen-oriented programs in other communities and organizations (ex: Jewish Teen Funders Network)

5. Create a Jewish Legacy (CJL)

- Promote, identify and solicit donors to take part in the OJCF Legacy Challenge, building up bequests gifts within the community by focusing on community members' consideration to leave at least \$10,000 or 1% of an individual's estate
- Create focused campaigns and materials to help meet the long-term financial planning needs of individual institutions and agencies

- Work with the boards of local Jewish organizations, agencies and synagogues in advocating the CJL strategy / planned giving
- Potential demographic candidates for the CJL program can be taken from all age-ranges and economic strata within the Ottawa Jewish community, including: Retired OJCF Board members, current and past Annual Campaign top donors; community agency board members; Synagogue congregants; retirees, etc.

6. INTER GENERATIONAL TRANSFER OF WEALTH / FAMILY PHILANTHROPY

- Increase donor and volunteer outreach structure to meaningfully engage next generation donors
- Ensure appropriate giving options are developed for the emerging generation
- Educate professional advisors about OJCF as a philanthropic option for relevant families
- Develop initiatives focusing on parents of next generation donors to secure gifts before the intergenerational transfer of wealth occurs
- Create opportunities to position OJCF as a leader in family philanthropy services, including the development of relevant materials, events, etc.
- 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
- 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)

MARKETING

Marketing, brand-development and communications are increasingly important for nonprofit foundations and organizations. We want our organization to be understood and supported by people who are willing to sustain and build upon it with their philanthropic dollars, which can be achieved by creating a brand that has the ability to resonate with donors on a deeper and personal level.

Effective communications strategies are essential to help establish the desire to give. In today's reality, communications technology preferences continue to shift among donors of all ages, with a large majority now preferring electronic over print communication. Recently collected data from across Canada has shown that even among the oldest donors, there is a growing interest in receiving information electronically, particularly among donors 65 to 74.

Improved web-based and electronic communications can provide superior benefits to donors, including access to more up-to-date and timely information, offering better return on investment

on donations and gifts. Donors want to feel connected to the organizations they support, and utilizing all that technology has to offer can help them feel closer to the OJCF. In addition, accessible analytics that are linked to enhanced electronic and web-based communication tools can help us determine what is working, for which segments of our community it works and what areas need to be tweaked.

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

1. OJCF RE-BRANDING

- Develop an annual and comprehensive plan for building on and improving OJCF's branding and visibility within the larger Jewish and general community
- Create directed marketing efforts using the OJCF website, newspaper ads, lawn signs, newsletters, etc.
- Enhance the Tribute Card program with redesigned cards and enhanced donation / incentive programs and services
- Develop appropriate tools to actively reach out and engage donors while showing appreciation for existing donors (NB: donors who are properly engaged could also be effectively used to attract new donors)

2. WEBSITE / E-COMMUNICATIONS

- Develop personalized e-communications plans to reach specifically segmented populations (ex: specialized e-blasts; affinity specific e-newsletters)
- Explore ways to better engage community members, donors and multiple demographics via assorted online platforms (ex: online updates, surveys, etc.)
- Explore new features to further personalize the website for individual donors
- Develop strategies to update data collection regarding donors (including current email addresses) to facilitate faster and cost-effective communication options
- Develop incentive programs for donors to visit the website and make donations online
- Create strategies to enhance donors' online connections with OJCF (ex: online event sign-up, collection of email addresses, tribute cards and donations)
- Enhance mobile engagement to capitalize on the increase in smart-phone and tablet technologies (NB: Convio predicts that by 2014 there will be a 90% growth in smart-phone adoption and that this technology will bring in \$630 billion)

3. OUTREACH AND EVENTS

4. Develop programs for current donors to show appreciation for their commitment and foresight (ex: "Art of Giving", Power Breakfast, Pearls of wisdom, etc.)
- Plan and host events with targeted groups and/or organizations (ex: JFO Women's Division, YAD, synagogues, etc.)

- Plan and hold parlor-type meetings to cultivate, involve, educate and canvass various niche-markets and groups, such as the following demographics:
 - Mid- and upper-range donors; 2nd generation members of top donor families; leadership of communal Jewish organizations (synagogues, etc.); women philanthropists/donors; financial, legal & estate planning professional advisors
- Promote an increased presence of the OJCF at community events (ex: JFO Annual Campaign kick-off event, etc.)
- Create OJCF marketing presentation to use at meetings with donor families beyond Ottawa (ex: Toronto, Florida)

5. BOOK OF LIFE

- Launch “BOOK OF LIFE” initiative and committee to develop this recognition program
- Define strategies for inclusion of relevant/appropriate fund holders, donors, legacy pledgers, etc. as potential signatories
- Develop appropriate designs and formats for the Book of Life (ex: hard copy, digital format, etc.)
- Develop plan to hold a Book Of Life launch event, likely in conjunction with the OJCF Annual General Meeting

BOARD DEVELOPMENT & EDUCATION
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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.

According to data collected as part of a donor survey (“Where Philanthropy is Headed in 2011 (Canadian Results)”) conducted in October 2011, 55% of volunteers said they received a Board package or manual when they came onto the Board and the majority felt it was helpful. However, only 38% took part in any kind of orientation program for Board members, usually because no such program existed. Training “on the job” was also rare with only 27% having experienced any kind of fundraising training. This highlights the important piece that board education plays in a volunteer’s experience, and attention must be paid to board development as an ongoing part of our mandate.

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

1. BOARD EDUCATION

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

2. MENTORSHIP

- 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
- Offer support and/or training for new committee chairs re: setting targets, developing annual strategies, etc.
- Annually revise OJCF Board orientation for new members

3. BOARD OF ADVISORS

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

OJCF 2012 Business Plan Measurables & Deliverables

	Action Item	Minimum deliverables
FUNDRAISING TARGETS	Legacy Challenge Gifts	25
	Annual CFM active relationships	20
	Volunteer DRM recruited	4
	CJL partnerships	4
	B'nai Tzedek gifts	20
	Face-to-face OJCF canvasses	50
	Money raised re: new gifts	\$500,000
	Money raised re: deferred gifts	\$1,000,000
MARKETING & COMMUNICATIONS TARGETS	Newsletters	3
	Events	4
	Directed donor communiqués	2
	Parlor meetings	2
BOARD EDUCATION TARGETS	Board-directed education seminars	3
	Disseminate Board education materials / articles	6