

Ottawa Jewish Community Foundation

2025 Business Plan



The Ottawa Jewish Community Foundation's (Foundation) 2025 Business Plan addresses the second year of our new five-year strategic plan, and first full year under the leadership of our new CEO, Adam Silver and Director of Development, Michael Reznick.

Despite this transition in leadership, in 2024 the Foundation received just under \$2M in new and existing funds, successfully completed the 4-year Life & Legacy Program, obtaining 581 gifts with a total value of \$20M, and increased disbursements to the government legislated 5% to help meet the needs of the community.

The 2025 Business Plan is focused on introducing new fundraising initiatives, while continuing to place priority on education and outreach initiatives, as well as operational improvements.

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.

Vision

As a trusted leader and the centre of Jewish philanthropic giving, the Foundation will engage, educate and inspire generations of donors, ensuring the long-term security and financial viability of Ottawa's Jewish community.

Guiding Principles

- **Determined Leadership:** the Foundation exercises innovative leadership, focused on respecting donor's rights, desires and aspirations.
- **Trusted Stewardship:** through professional financial management, the Foundation is committed to the responsible and transparent stewarding of all assets entrusted to us.
- **Jewish Values:** the Foundation's Jewish values of *tikkun olam*, *tzedakah*, and *l'dor v'dor*, shape and direct our mission to strengthen the Ottawa Jewish community. These values inspire us to work with all people in a collaborative, compassionate and respectful manner.
- **Commitment to Excellence:** the Foundation strives for excellence in all aspects of our work, which fosters trust with donors that we will meet their philanthropic goals.

The Foundation business plan is rooted in our five-year strategic plan. With a considerable proportion of the new endowment dollars over the next five years coming via donations to the Generations Trust, this five-year plan focuses heavily on the continued prominence of legacy giving, increasing the Foundation’s visibility as well as encouraging people to top up the funds.

Priority	5 Year Strategic Plan Goal
Fundraising	
New \$ Contributed into Foundation to mark life-cycle moments	30 Life-Cycle moments minimum
New Legacy commitments	75 commitments, minimum estimated value \$5M
Life & Legacy Plus	Grinspoon Foundation Metrics are met
Generations Trust	\$1.5 Million minimum
Governance, Operation, Education and Outreach	
Operational Improvements	Minimum ¾ achieved annually
Investment	TBD, after a careful review
Giving Vehicle Promotion	Minimum 10 initiatives not currently done
Board Fundraising	100%

2025 Objectives

Our 2025 business plan is the onramp to the success of our larger strategic plan, and as such, the objectives feed directly from it.

Fundraising

Objective - Launch a new Community Grandparents Fund Initiative – This innovative program bridges generations by empowering the first generation to instill the values of giving and community in the third generation. The fund fosters multi-generational engagement, strengthens bonds within families, and creates a lasting legacy of philanthropy that will benefit the Ottawa Jewish community for years to come. The objective is to successfully launch this initiative as a new avenue for grandparents to connect their grandchildren to the importance of giving, ensuring a strong and vibrant philanthropic future for the community. This initiative includes matched funding upon the establishment of a fund, as well as several milestone donation touchpoints (i.e. birthdays, graduations), and will be very generously supported by a private donor couple.

Objective - Strengthening Regional Awareness of OJCF - The Ottawa Jewish Community Foundation aims to strengthen its regional presence by positioning itself as a central platform for philanthropy and fostering connections with Jewish communities beyond Ottawa. This objective includes hosting an introductory event to familiarize regional communities with the Foundation’s mission and values, as well as developing a dedicated program to engage and encourage their participation. These efforts will expand OJCF’s reach, increase community involvement, emphasize its critical role in securing the future of Jewish life in the region, and will position us as the Greater Ottawa Jewish Community Foundation.

Objective - Life and Legacy Plus – Successfully launch Life and Legacy Plus with six participating organizations and secure at least six signed Letters of Intent (LOIs) by the end of 2025. Since the program is set to begin in June 2025, this timeline leaves just six months to achieve these targets, aligning the program’s rollout with the Foundation’s annual cycle. We are working with the Harold Grinspoon Foundation and our designated L&L consultant to ensure we maximize the opportunities provided by the program.

Education and Outreach

Objective - Cultivating the Next Generation of Philanthropic Investors – Encourage young adults (22-40) to make charitable investments in the Jewish community by organizing an educational event that highlights the parallels between private market investments and philanthropic giving. The event will emphasize the importance and benefits of investing through the Foundation, including tax advantages and the impact of legacy giving, inspiring the next generation to contribute meaningfully to the community's future.

Finance, Governance and Operations

Objective - Review the Investment Policy Statement and our Investment Management Model, in consideration of the New Disbursement Rate – With a rapidly changing economic climate and the requirement for an increased annual call on capital, reviewing our investment bands is paramount to maintaining the capital of the Foundation.

Objective - Continuous Operational Improvements – Foundation requires consistent operational improvement to maintain donor confidence. Key operational improvements will include:

- 1) A written SOP document for the new CRM;
- 2) Staff transition documents for all positions;
- 3) Process guide for the set-up of customized fundraising pages and their marketing; and
- 4) The development of a more fulsome and robust new Board of Directors onboarding program (incl. updated supporting orientation materials).

Evaluation 2024

In 2024, the Foundation achieved the majority of its objectives:

Legacy Giving:

The objective was to obtain 15 new legacy gifts, including finishing Year 4 of the Life & Legacy Program on a strong footing and securing admittance to Life & Legacy Plus for future years.

Result: 15 legacy commitments were obtained with a value of \$709k.

Result: Year 4 of the Life & Legacy Program was finished with 5 partner agencies successfully completing the program.

Result: Applying to Life & Legacy Plus was delayed but it is anticipated that the Foundation will join the program in June 2025.

Endowment Fundraising:

The objective was to secure a minimum of 5 new endowments and/or significant investments to existing endowment funds around life cycle moments:

Result: the Foundation secured 9 new endowment funds.

Result: Life-cycle moments include birthdays, anniversaries, bar/bat mitzvahs, deaths – the Foundation offers donors a report with a record of all donations and messages, as well as mailing labels to thank you donors. The goal was surpassed with 6 life-cycle moments honoured.

Generations Trust:

The objective was to create a list of prospects for \$50-\$100k donations to Generations Trust.

Result: the Foundation secured 10 partners with a total of just under \$2.5M received.

Education and Outreach:

The objective was to create two new initiatives to explain Foundation giving vehicles.

Result: a new Giving Vehicles brochure was created that was posted to the Foundation website and put out to the community through social media.

Governance and Operations:

The objective was to review the Investment Policy Statement, in consideration of the New Disbursement Rate.

Result: the Investment Committee has created an investment sub-committee who is doing a fulsome review of the current investment model, including the Investment Policy Statement, with recommendations to be brought first to the Investment Committee and then the Foundation Board in September 2025.

Appendix A

Continuous Operational Improvements

	Opportunity/Need	Result
Software Transition	With the transition to a new CRM, a written SOP needs to be created.	Staff collaborated in creating standard instructions for varying functions in CSuite. Further work needed to complete the project.
Staff Transition Documents	With staff turnover, there needs to be a standardized transition document created for all positions.	With organizational transition, there were delays in the completion of the transition documents.
Process Guide for customized fundraising pages	A guide for the on-line donation platform on how to create customized fundraising pages and their marketing	A comprehensive guide was created.