Ottawa Jewish Community Foundation
2026 Business Plan

The Ottawa Jewish Community Foundation's (Foundation) 2026 Business Plan addresses the third year of our five-year strategic plan, and second full year under the leadership of our new CEO, Adam Silver and Vice-President of Development, Michael Reznick.

Despite this transition in leadership, in 2025 the Foundation received $1M in new and existing funds, successfully began the Life & Legacy Plus Program, and increased disbursements to the government legislated 5% to help meet the needs of the community.

The 2026 Business Plan is focused on introducing enhanced fundraising initiatives, solidifying Generations Trust, and reviewing the Foundation's investment model, while continuing to place priority on education and outreach initiatives, as well as operational improvements.

Mission	Vision
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.	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'do*r, 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 their 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%

2026 Objectives

Our 2026 business plan is the onramp to the success of our larger strategic plan, and as such, the objectives feed directly from it.

Development and Fundraising

Objective - Expand the Grandparents Legacy Initiative - What began as a pilot is now proving to be a powerful entry point into multi-generational philanthropy, and in 2026 the focus will be on taking it from a small number of early adopters to a recognizable, community-wide platform. This will include opening additional funds, formalizing milestone-based giving such as birthdays, B'nai Mitzvahs and graduations, and deepening partnerships with programs like PJ Library and Jewish education.

Objective – Continue to formalize and advance Generations Trust. 2025 involved major steps in creating and distributing formal agreements to Generations Trust (GT) donors, and more formally mapping the path to $27.5M in commitments. 2026 will see enhanced efforts to secure signed agreements from 75% of GT donors, as well as continue to collect timely payments with administrative focus on invoicing and follow-up. With support from GT's volunteer leadership, it is possible a next tier of canvassing will be initiated, with a focus on those donors who wish to contribute but are unable to do so at top gift levels.

Objective - Continue building Life & Legacy Plus as a primary long-term growth engine for Foundation. In 2026 the emphasis will move from launch to scale. This means supporting the six partner organizations in running strong legacy conversations, converting active prospects into signed Letters of Intent, and building a steady pipeline of future endowment gifts. The aim is to make legacy giving a normal and expected part of donor engagement across the Ottawa Jewish community.

Objective - Increase board participation in endowed giving, setting a target of more than 80% of board members holding active funds at OJCF. In addition, increase board fundraising efforts by curating specific canvasses and providing the necessary tools and support for board members to actively fundraise.

Education, Outreach, and Stewardship

Objective – Continue to engage the next generation through solidifying the relationship with J-Fellows and Federation's Emerging Gen/Young Adults initiatives and holding another impactful Dorot event.

Objective - Launch a new digital fundholder portal that allows donors to access their funds online in real time. This will give fundholders the ability to see balances, review activity, and make grant recommendations directly, without having to contact staff for routine updates. Beyond improving service, this is a major step in modernizing the donor experience, reducing administrative friction, and positioning the Foundation as a professional, donor-centric organization that operates at the standard expected by today's philanthropists.

Finance, Governance, and Operations

Objective – Complete the investigation of the Foundation's investment model and determine the best path forward. Incredible research and work has been done to generate a Request for Proposal (RFP) for potential investment activities via Outsourced Chief Investment Officer (OCIO) model, and the organization will follow through on administering the RFP and determining whether a model change is necessary and, if so, complete that process.

Objective – Ongoing improvement of operations. The Foundation continues to seek ways to improve its operations with both internal and external audiences in mind. We will be working on clearer instructions and mechanisms for making donations, and reviewing our web and digital tools for improved design and function.

Evaluation 2025

In 2025, the Foundation achieved the majority of its objectives:

Launch a new Community Grandparents Fund Initiative:

Result: The Community *Grandparents Legacy Fund* Initiative was successfully launched and is already producing results. An agreement with the very generous matching donors has been signed. Two funds have been formally established, with five more expected to open shortly. The initiative was presented to the community at the OJCF Annual General Meeting and has since moved into real programmatic activity. This initiative sponsored PJ Library's young families event in December, which gave the fund immediate visibility and demonstrated how it connects grandparents, parents, and children through shared philanthropy. What began as a new concept has become a functioning and growing platform for multi-generational engagement.

Strengthening Regional Awareness of Ottawa Jewish Community Foundation:

Result: This objective was also achieved. The Foundation has become a visible and valued partner in major Federation events, where its role and mission are now clearly communicated. The strongest example of this is the Dorot Legacy Reception, where OJCF served as the lead philanthropic partner and will continue to do so this year. This positioning has allowed the Foundation to bring its fundholders directly into the community's centre of gravity, with donors holding more than $50,000 in funds invited to participate. In the coming year, this will expand further to include Life & Legacy donors, deepening the Foundation's integration into the broader philanthropic culture of the Greater Ottawa Jewish community. As well, a discussion was held with a lead volunteer in Kingston about how the Foundation might assist that community.

Life & Legacy Plus:

Result: Life & Legacy Plus was launched successfully and is now in its early operating phase. The program was rolled out in partnership with the Harold Grinspoon Foundation and our Life & Legacy consultant, and six partner organizations are now actively participating. The first wave of donor outreach and legacy conversations is already underway, creating a strong pipeline for signed Letters of Intent and long-term endowment growth.

Cultivating the Next Generation of Philanthropic Investors:

Result: More cross-pollinated efforts were made over the year to connect Federation's Emerging Gen/Young Adults program and participants to the Foundation's efforts. The J-Fellows program continued to see a focus on making the connection, culminating in J-Fellows' presentations at Dorot, our new signature joint event with Federation which perfectly demonstrates the continuum of past, present, and future leadership and philanthropy.

Review the Investment Policy Statement and our Investment Management Model, in consideration of the New Disbursement Rate:

Result: The Investment Committee created a sub-committee to research and potentially initiate a new investment model for Foundation. A Request for Proposal (RFP) has been created, and a shortlist of potential firms to be invited to submit is being curated. The IPS remains current, but the RFP asks firms to provide feedback and input into that document. This work continues in 2026 with the intention of completion.

Continuous Operational Improvements:

Result:

1) A written SOP document for the new CRM is in process as we continue to standardize our intake procedures;
2) Staff transition documents for all positions were created;
3) Process guide for the set-up of customized fundraising pages and their marketing – this was paused as we placed priority on improving our donor stewardship, portal creation, and assistance with specific funds such as Women's Collective Philanthropy Program and Generations Trust;
4) The development of a more fulsome and robust new Board of Directors onboarding program (incl. updated supporting orientation material)