



TECHNION CANADA STRATEGIC PLAN 2019-2024

October 2019



Prepared by Offord Group

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Foreword

Technion Canada has made significant progress since its founding in 1943 by a small informal group of young engineers and architects who sent technical books to Technion in Israel. Today, Technion Canada is enabling Canadians to participate in creating a better world by promoting Technion-Israel Institute of Technology and contributing to the growth of the University's diverse students, faculty and innovative environment. Technion Canada's importance as an organization building broad awareness of and financial support for Technion Israel are key to what it does.

Technion Canada has experienced significant change in recent years. Having a strategic plan to guide its activities for the next five years will be critical to managing through today's norm of constant change. This plan aims to build on past strengths and to prepare for the future. It reflects significant thinking and includes meaningful goals designed to engage Technion Canada's donors, volunteers and the wider community in helping achieve the vision of a healthy and sustainable Israel and world, fueled by Canadian investment in the Technion-Israel Institute of Technology.

Setting strategic priorities is a team effort and there are many people to be commended on their willingness to provide insights, ideas and support. A special thank you to Elysa Greisman, National Executive Director and to all Board of Directors, interviewees and survey participants. This process benefitted significantly from their engagement, encouragement and perspectives, and from the assistance and support provided by Judy Charney, National Office Administrator and Shonna Ross, National Controller. Thank you all.

A lot of work remains to be done as Technion moves forward with an implementation strategy. The staff team will need the continued partnership and engagement of members of the Executive and Board, as well as supporters and partners as Technion Canada embarks on its exciting next steps.

Sincerely,



Robin Fowler, CFRE, Senior Consultant & Principal, Offord Group and Marts & Lundy



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Executive Summary

Technion Canada (TC) is at a critical point in its 76-year history. There has been significant change in recent years – internally, locally and globally - affecting TC and the entire charitable sector. Strategic planning has thus become an essential part of good business and leadership.

Technion-Israel Institute of Technology (Technion Israel) has benefitted tremendously from the support of TC's donors and friends. This strategic plan will serve as a blueprint to further develop the Canadian imprint on this esteemed institution and nurture the future for all of humanity.

Technion-Israel Institute of Technology is Israel's centre for science and technology education and research. It has earned a global reputation for its pioneering work in computer science, defensive technologies, environmental engineering, medical research, nanotechnology and more. Technion Israel is internationally recognized, with over 100,000 degrees awarded since its founding in 1912 to a diverse group of students from around the world. Its well-respected graduates include leading scientists, Nobel Laureates, engineers, doctors, and captains of industry.

As one of those interviewed through the process noted, "Technion makes a difference on a massive scale: to the world at large. Technion Canada helps Technion Israel and Technion helps the world."

In the spring of 2019, TC began a strategic planning initiative. This initiative included a review of financials and materials, interviews with key stakeholders, an online survey to a larger group and a retreat with the Board in September 2019. From these consultations, a set of ambitious strategic directions have been developed, along with measurable goals and impacts.

The focused strategic directions take into account the current state of the Canadian philanthropic sector and, as was made very clear from consultations, that Technion Canada's purpose centres around two key areas: fundraising for Technion Israel and building awareness across Canada about its work.

Time and attention were spent on developing vision, mission and value statements that reflect Technion Canada today:

Vision: A healthy and sustainable Israel and the world around it, fueled by Canadian investment in the Technion-Israel Institute of Technology.

Mission: Technion Canada supports the advancement of education, critical research and technologies at the Technion-Israel Institute of Technology.

Core Values:

1. Engagement
2. Achievement
3. Innovation

Six interrelated priorities will be the focus of **Technion Canada's strategic direction towards 2024**, the details of which are provided further in this plan:

1. Position Technion Canada as a major fundraising entity and highlight its goal in the Global Campaign to build awareness and raise \$125M
2. Rebuild and refocus the Board's efforts on fundraising
3. Grow and improve Technion Canada's engagement and volunteer programs
4. Enhance the Communications & Marketing program to build awareness
5. Create an extraordinary Donor Relations Program
6. Develop the best talent and resource for success

There will be additional work required to finish every specific tactic and measure, however, this will be an exciting part of the implementation process. These strategic priorities will provide a roadmap for Technion Canada's leadership and its Board and other key volunteers. In the coming years, they should be reviewed, measured and refreshed as needed based on today's constantly changing environment.

Planning Context

The strategic planning process for Technion Canada has been comprehensive. See *Appendix A* for more details and participant lists. In brief:

- Consultation and planning meetings began in May 2019 with staff and the Offord Group team.
- A full review of materials and financials took place over the summer by Offord Group.
- An online stakeholder survey was sent to 100 individuals in July; 34 completed the survey. Comprehensive survey findings can be found in *Appendix D*.
- Eight interviews were held with 11 opinion leaders of Technion Canada, including Board members, donors and volunteers.
- Pre-work was sent to Board members prior to the retreat and the findings were included in the retreat presentation.
- The Board retreat was held on September 8 in Kingston, Ontario. A total of 14 Board members and TC staff took part.
- The strategic plan draft was approved by the Board at the October 16 Board Meeting.
- Final step: at the November 10 Annual General Meeting the Board will recommend approval and adoption of the plan for the next five year, with a thorough plan review after three years.

Canadian Philanthropy Today: Context

As the goals and objectives of Technion Canada are defined and implemented, there are many external factors that should be considered, including:

- The charitable marketplace in Canada is vibrant, cluttered, complex and competitive. There are over 86,000 registered charities in Canada and over 165,000 nonprofits and charities overall. There is therefore a need for both strategic and tactical expertise.
- Canadian charitable market share has changed considerably in the last 15 years:
 - The charitable market has grown by 90% to almost \$27 billion (and we expect this growth to continue at about a rate of 3-6% annually);
 - Ontario receives approximately 50% of all dollars raised in Canada and Toronto approximately 22% of all dollars;
 - Provinces with the greatest growth overall were Saskatchewan and British Columbia;
 - The market share of Welfare/social services charities has grown the most among all sectors – from 23% to 30% - and is the largest market share among Canadian charities, followed by Religion (29%), Health (22%), Education (15%), and Arts & Culture (4%).
- Overwhelmingly (80-90%) of giving is local. International fundraising (disaster relief, international aid) represents less than 4% of Canadian philanthropy.
- There has been a sharp decline in endowment giving in favour of expendable giving in recent years.
- Changing Canadian demographics:
 - Most charitable donations come from those over 55. Baby Boomers are Canada's primary donors. Their key interest is healthcare. Donors 50+ now account for 75% of all donations compared to just over half (53%) in 1985.
 - Women are playing significant roles as donors and volunteer leaders and they engage differently than men. Giving to Canadian charities from women has tripled over the last 30 years.
 - Gen X is starting to become more philanthropic.
 - Millennials are a demographic force, but they seek direct experience with charities and are motivated by demonstrated impact over traditional obligations to give.
- Wealth in Canada is growing – In 2016, Canada had 485,000 millionaires and ranked 5th in the world. By 2023, it is estimated that Canada will have 2 million millionaires.
- Ways of giving have changed:
 - The Pareto principle (80% of revenue comes from 20% of donors) has shifted. Today we see many charities with ratios such as 90/10 (90% of the donations come from 10% of donors). Major Gifts are therefore critically important. They are the most effective type of fundraising for driving individual donations to Canada's nonprofits.
 - Technology and online giving continue to grow. Online giving increased 22.5% on CanadaHelps' platform from 2006-2015.
 - There is a much higher donor desire for documentation, accountability, measurable outcomes and impact.

Sources: Innovative Research Group (studies for Offord Group), BCG, Credit Suisse, Imagine Canada, Statistics Canada

Technion Canada Today

Strengths, Weaknesses, Opportunities and Threats (SWOT)

The stakeholder interviews, online survey, Board Retreat and material review revealed key topics of consideration for Technion Canada's strategic plan. These are summarized here in a SWOT analysis.

CORE STRENGTHS

1. **Opinion of Technion Israel**

There is a unanimous positive opinion of Technion Israel. Interviewees and Board members expressed pride and emotion for the significant impact Technion Israel has had on Israel and the world through its scientific and technological innovations. In addition, as an educational institution, many spoke about the imprint it has left on Israeli citizens and on Israel's success as "Start-up Nation".

2. **Board Commitment**

Although the Board of Directors faces challenges that need addressing (see *Core Weaknesses*), the dedication and long-standing involvement of many of its members is valuable and a testament to the passion of the Board for the cause.

3. **Refreshed Leadership**

Optimism about the new National Executive Director, Elysa Greisman, was also expressed by many. Enthusiasm about change lays a foundation for Elysa's leadership and her role in refreshing the organization's strategic direction.

CORE WEAKNESSES

1. **Awareness & Fundraising**

The lack of public awareness of Technion Canada/Technion Israel is a dominant issue that emerged. It appears that TC communications, marketing and events have not sufficiently penetrated the Jewish community and have not captured the attention of the non-Jewish public across Canada. In addition, while sister organizations like American Technion Society prominently publicize Technion Israel's unprecedented \$1.8B Global Campaign, there was virtually no awareness of it on the Canadian side, despite TC's commitment of \$100M.

Fundraising was most commonly viewed as "somewhat effective" by survey respondents and many stakeholders talked about this as an area in need of significant improvement. Total revenue for TC has fluctuated from year to year (see *Appendix B*), influenced heavily by one-time bequests, principal gifts or galas. While TC has raised significant funds over the years, it has not been as focused, strategic or coordinated as it could be. Overall, past results point to an inconsistent and underdeveloped fundraising program (the positive is that there is great potential).

2. **Donor Relations**

Donor relations were described by many as poor. Only 55% of survey participants felt valued as donors. Several donors articulated never receiving information about how their donation was used, even when directed to a specific initiative. There was concern especially about stewardship of major donors, resulting in the loss of some prominent supporter families.

Furthermore, TC has experienced a consistent decline in the number of donors year over year with almost 50% fewer donors in FY2018 compared to FY2014 (see *Appendix C*). The number one reason that donors stop giving is that they don't feel like their gift matters. Thanking, stewarding and recognizing donors is key to retaining them. Raising funds by retaining donors is significantly more effective than by attempting to acquire new donors.

3. **Board Culture and Participation in Giving**

In contrast with the dedication of individual Board members, board culture as a whole was described by many as problematic and even toxic. Infighting, power politics and lack of focus were all brought up. In addition, there was confusion about the Board's mandate and the length of terms for Board members. It also appears that the Board has not been explicitly tasked with fundraising and there is not adequate connecting or soliciting by members.

4. **Volunteer Engagement**

Governance and engagement of all TC volunteer committees came up as an issue. The Generation Next, Alumni and regional council groups were perceived as ineffective and without clear direction and meaningful opportunities to contribute.

OPPORTUNITIES

1. **New Markets & Partnerships**

The most widely identified opportunities by stakeholders involved "tapping into" target markets like Western Canada, the start-up/tech/innovation sector, the non-Jewish community and profitable commercial organizations that are using Technion technology. Additionally, generations ranging from millennials to old donor families were described as important populations to engage with. Partnering with Jewish schools and Canadian universities to raise TC's profile were also suggested.

2. **Loyal donors**

In the last 5 years, there have been over 80 donors who have given to TC loyally every year, with over 20 giving in the thousands. The total revenue from loyal donors from 2014-2019 was over \$2M, with an average of \$315,092 over 5 years. This is a segment with significant potential and a focus on this will yield increased funds and greater engagement.

3. **Planned Giving**

Planned giving, primarily in the form of bequests, is an increasingly effective vehicle to ensure a charity's financial longevity. TC has received several bequests which have had a significant impact on total revenue. Over the last 5 years, TC received an average of \$556,000 (average excludes one significant outlier) and 12 bequests per year. Notably, a bequest of \$7.3 million was received in FY2016.

Several interviewees talked about this area as an opportunity and 18% of survey respondents have included Technion and/or other charities in their estate plans, with another 16% indicating that they would consider this.

4. **Greater Focus on Fundraising by Staff and Board**

Investing greater effort and resources into fundraising was brought up by many as an opportunity to grow. Stakeholders suggested a variety of ideas from minimum board donations, to "big names" on the board, to a bigger staff of seasoned fundraisers.

THREATS

The external threats to Technion Canada's success are helpful to keep in mind to ensure goal setting is realistic. Most charitable institutions face the challenges identified by TC stakeholders: competition and a saturated charitable market, overall declining rates of giving among alumni in most educational institutions, and the lack of a long-standing tradition of alumni giving in Canada and Israel.

Vision, Mission & Values

Up until this point Technion Canada has not had an official mission and vision statement, nor established values. These three elements serve as a foundation upon which strategic goals and tactics can be built.

Drawing from sister organizations --Technion Israel and American Technion Society (ATS) – and the work with stakeholders, mission/vision/values were drafted.

Technion Israel did not have a mission statement online but articulated the following vision: A science and technology research university, among the world's top ten, dedicated to the creation of knowledge and the development of human capital and leadership, for the advancement of the State of Israel and all humanity.

Technion Israel's Resource Development department mission:

Technion Israel Resource Development focuses on securing the resources necessary for Technion to carry out its mission. It does so by providing project proposals and long-term donor stewardship. Strategic fostering of relationships with Technion societies around the world, individual donors, foundations, and other organizations results in goodwill and philanthropic engagement.

ATS mission:

The American Technion Society supports visionary education and world-changing impact through the Technion-Israel Institute of Technology.

Current TC material lists several organizational mandates, from raising philanthropic donations to promoting Canadian use of Technion educational facilities to facilitating the exchange of scientific information between Canadian institutions and Technion.

The strategic planning conversations addressed the questions of purpose and mission of TC. Fundraising for Technion Israel was discussed by most as the primary role of the organization, followed by raising awareness. There was some, but limited, mention of fostering academic collaborations between Canada and Technion, and increasing Canadian enrolment in Technion.

Discussion at the Board retreat and meeting led to the approval of the following mission, vision and values:

Mission: Technion Canada supports the advancement of education, critical research and technologies at the Technion-Israel Institute of Technology.

Vision: A healthy and sustainable Israel and the world around it, fueled by Canadian investment in the Technion-Israel Institute of Technology.

Organizational Values:

1. *Engagement* - We value respectful ongoing collaboration that builds relationships with our community of donors, volunteers, staff, and Technion alumni, students, faculty and staff. We value connecting our community to the impact Technion is making in Israel and worldwide.
2. *Achievement* - We value ambitious, impactful goals and strive to meet them. We reach for excellence in all that we do: from fundraising to donor relations to community engagement.
3. *Innovation* - We value change, excellence, growth and ongoing improvement. We are open to introducing new methods and ideas to achieve our mission.

The following values also came forward and Technion Canada may wish to add 2-3 of these to the list above or simply keep them in mind.

4. Leadership
5. Education
6. Integrity
7. Accountability
8. Donor-centricity
9. Excellence
10. Collaboration
11. Community
12. Impact
13. Jewish values/ Israel

It is recommended that TC publicizes its mission/vision/values and keeps them top of mind. They should also be reviewed in coming years to ensure they remain relevant and reflect the organization.

Strategic Directions & Goals

Strategic Direction 1: Position Technion Canada as a major fundraising entity and highlight its goal in the Global Campaign to build awareness and raise \$125M.

1 - Create positioning for Technion Canada around a \$125M campaign towards 2024 to build greater awareness and clarify that Technion Canada is a fundraising organization

- A. Develop terms of reference by end of 2019 that outline job roles and expectations for campaign cabinet volunteers for the purposes of Major Gifts/Campaign work.
- B. Recruit and orient a campaign cabinet by mid-2020. All volunteers should be major donors.
- C. Re-engage with and ensure the development of strong relationships with all past major donors – personal visits to all and custom impact reports by end of 2020.
- D. Define major gifts as \$10K+ and develop strategies to focus on these, achieving minimum 10 new gifts at this level in 2020, 15 in 2021 and 20 in 2022.
- E. Develop strategies to focus on gifts at the \$100K level. Develop prospect list of 100 potential donors at this level by end of 2019.
- F. Develop strategies for past and potential donors at the \$1M+ level in order to close out the \$125M campaign by 2024.

2 - Set specific goals for Annual Giving fundraising

- A. Build a Loyal Donor program (donors giving consecutively for 5 or more years) to raise a minimum of 10% more than in the previous 5 years and to grow the number of loyal donors to 100 by 2020 and 120 by 2021.
- B. Focus on growing the number of monthly donors by at least 10% by 2022. Develop regular cultivation (for upgrades) and stewardship strategies for this important group of donors.
- C. Grow the number of intermediate (leadership annual - \$1K to \$10K) donors to 60 in 2020 and 100 by 2021.
- D. Segment and solicit past donors who gave \$500 to \$999 for gifts of \$1K+.
- E. Consider an acquisition campaign in 2020-2021 to broaden and deepen the donor pool, keeping in mind acquisition rates can be challenging and this is an investment. Engagement and donor relations activities will have to be strong to retain these donors beyond year 1.
- F. Update CanadaHelps messaging and options for enhanced value proposition and impacts.

3 - Redevelop the Planned Giving (PG) program

- A. Conduct data mining and prospect research (loyal donors often become the most generous PG donors) by mid 2020.
- B. Develop a specific PG prospect list of at least 50 by mid-2020.
- C. Secure a minimum of 20 new expectancies by 2022 and 50 by 2024.
- D. Create inspiring and targeted communications that highlight tools and impacts of legacy giving by end of 2020.
- E. Integrate the program with Annual Giving (particularly loyal and leadership annual giving) and major gifts.
- F. Build strong engagement with volunteers (volunteers often make significant planned gifts).
- G. Build a story bank of past PG donors/families to encourage others to do the same.
- H. Develop relationships with professional advisors to promote planned giving.

Strategic Direction 2: Rebuild and refocus the Board's efforts on fundraising

While not all Board activity is fundraising, there needs to be a focus on this area. Leadership from the Board will be critical for future success. The Board is an important entity for Technion Canada, providing leadership and insights into what might be possible and ensuring there are sufficient resources to be successful. The Board also provides key oversight and diligence, as well as foresight looking out to long-term goals.

1 - Create role clarity for Board members by end of 2019 with a job description for all Board members that outlines:

- A. The importance of 100% Board participation in giving.
- B. A minimum financial expectation for all Board members of \$1,800/year (\$150/month) to demonstrate leadership around the fundraising agenda. *Note that recently recruited Board members are not obligated to make this commitment until their second year, but they are encouraged to do so.*
- C. A process whereby board members (up to 3) who cannot make the minimum requirement can still be part of the philanthropic agenda.
- D. Term lengths for all Board members, and the opportunity to renew one's term once after a two-year hiatus.

2 - Review the governing documents annually and ensure good risk management processes are in place

- A. Review the governing documents and be aware of the content of the articles of incorporation (especially objects and restrictions) and the by-laws. As a public foundation, TC should also review its Notification of Registration from CRA for any restrictions or requirements that are specific to TC. The legal objects, sometimes referred to as purposes, are like a box that must be ticked. [end of 2020]
- B. Ensure Board members have a good understanding of any potential risks. Ask: What are the worst things that can happen? What are the most likely things that can happen? And develop plans to manage and answer these questions. [by end of 2020]
- C. Use a skills matrix for recruiting to ensure diversity and strength of the Board.

3 - Ensure ongoing education is in place for Board members [by end of 2020 or before]

- A. Ensure educational sessions are made available to all Board members at regular intervals through their terms. Ongoing education should be planned at the beginning of each year and be scheduled in with specific topics to ensure all Board members can provide meaningful insight, oversight and foresight for TC.

4 - Ensure all Board members spend time working on philanthropy

- A. Ensure all Board members have specific tasks around philanthropy, such as identification of new potential donors and volunteers, engagement, cultivation, and donor relations activities. A checklist could be developed for Board members to commit to a minimum of 3 activities annually. [by end of 2019]
- B. Participate in thanking donors regularly. [ongoing, beginning in 2019]
- C. Each board member to connect TC to a minimum of 3-5 potential donors/volunteers [mid-2020]

5 - Develop honorary council for retiring/past Board members

- A. This council will assist in ensuring the history of many long-term board members is not lost. This group will be invited to come together once/year at minimum -- perhaps at the AGM or other Board meeting -- to meet and discuss a key issue and be recognized for their contributions. It will also ensure a continuation of energy, passion and history. There is no term length to be on this council – members may be appointed in perpetuity. [develop and implement no later than end of 2020]

Strategic Direction 3: Grow and improve Technion Canada's engagement and volunteer programs

1 - Alumni Committee

- A. Working with the Chair of the committee, establish terms of reference and clear mandate for the group; consider a distinct group name [2020]
- B. Create a menu of opportunities for committee members and ask for each committee member to take on at least one (e.g., hosting and assisting with planning an alumni event, collecting alumni stories and profiles, researching/finding Canadian alumni, speaking at an event) [2020]
- C. Annually, develop a plan of activities for alumni [starting in 2020]
- D. Grow prospect base of Canadian alumni through a research plan and partnership with Technion-Israel (grow alumni contact list from X to Y) [2020-24]
- E. Leverage alumni stories and achievements to showcase Technion impact by creating an alumni story bank
- F. Ensure that Chair reports to Board regularly to bridge together the role and activity of alumni group with the rest of Technion Canada
- G. Create an alumni specific communication (e.g., e-newsletter) [2022]
- H. Launch an alumni participation campaign (focus on 100% alumni participation vs. \$ raised) centered around the Global Campaign and identify key alumni volunteers who can drive fundraising within group [2022-24]

2 – Generation Next

- A. Define the target market (e.g., young professionals of certain age and/or leaders in specific sector like innovation and technology) [2019-2020]
- B. Establish terms of reference and clear mandate for group [2020]
- C. Rebuild and cultivate relationships with past Generation Next committee members and trip participants [2020]
- D. Recruit Chair(s) who can assist with adding new members and can serve as a Board member / Board liaison [2020]
- E. Once committee is rebuilt, create and implement a 2-3 year plan of activities and engagement opportunities [for implementation starting in 2021]
- F. Set an achievable fundraising goal or 100% participation goal around the Global Campaign and identify key Generation Next volunteers who can drive fundraising within group [2021+]

3 – Regional Councils: Toronto, Montreal and Western Canada

- A. Establish terms of reference and a clear mandate centered around committee members as network builders who help identify and cultivate regional prospects [2019]
- B. Create a 3-year plan of events that build upon one another; consider an annual intimate parlour meeting in each city and 2 broader awareness events in 3 years [2020+]
- C. Assign goals to committee members about # of guests to invite, ensuring that the right people (donors and prospects) are being invited
- D. Committee members and staff work together to ensure that follow-up is made with all prospects brought forward through events and that relationships move forward toward solicitation

Strategic Direction 4: Enhance the Communications & Marketing program to build awareness

1 – Improve communications materials so that they articulate TC’s mission, showcase Technion’s inspiring achievements and compel action

- A. Leverage the material and language that ATS and Technion Israel are using around the Global Campaign to articulate and promote the fundraising priorities and their potential impact [2019 to mid-2020]
- B. Revamp proposals, appeals and marketing material with improved messaging [2019-2020]
- C. Redesign/update the website to focus on fundraising and engagement [2020-21]

2 - Develop and execute a digital marketing strategy to raise awareness and keep constituents informed

- A. Create and implement a social media plan which capitalizes on the strong Facebook following; ensure plan has metric goals such as an increase in followers and post engagement [2020]
- B. Create an email communication plan (at least 1 email per month to inform/steward and 1 for fundraising or program promotion) [2020]
 - a. segment and personalize communication wherever possible (especially donors vs. non-donors)

3 – Build and execute a strategic events program

- A. Create a high-level 3-year events plan that establishes the # of events, region, target group and purpose for each event (e.g., awareness/discovery, cultivation, fundraising, stewardship) [2019-2020]
- B. Ensure that adequate resources (time, staff, budget) are available before executing any event
- C. Layer events so that they are interconnected and not isolated “one-offs”
- D. Work together with leadership of the volunteer groups to create a more concrete events calendar for the upcoming year [2019-2020]
- E. Execute events, working together with Board and volunteer groups to ensure that key prospects are in the room and there is proper follow-up [2020-2024]

4 – Promote visits to Technion-Israel [starting in 2020, fully developed Visits Program in 2021]

- A. Encourage Canadians traveling to Israel and TC supporters to visit Technion and see some of its incredible work first-hand
 - a. Track visits with a goal of 6 in 2020, and an additional 10 in each year that follows
 - b. Use Board members and volunteers as program recruiters especially if they have visited themselves
- B. Work with Technion Israel to create a process that allows TC to access information about Canadian visitors
- C. Create a process of follow-up with visitors and opportunities for continued engagement with TC (e.g., add to mailing/email list, invitation to local event, Annual level solicitation if they had an extraordinary experience)

Strategic Direction 5: Create an extraordinary Donor Relations Program

1 – Increase donor retention by 20% by establishing an acknowledgement, recognition and stewardship plan [by 2021]

- A. Create and implement a Donor Relations Matrix that outlines actions by donation amount and type, ensuring that all donors and volunteers are included [2019-2020]
- B. Build in opportunities for Board members and volunteers to thank donors (e.g., thank you calls, personal notes, holiday greetings)
- C. Use existing Technion-Israel news and stories to include regular donor-centric impact communication including concrete examples of how Canadian support has been used

2 – Focus on stewardship of Major Gift Donors

- A. Work with Technion Israel to create personalized, meaningful impact reports [by end of 2020]
- B. Include stories and testimonials from professors/students who benefit from support and tell their stories
- C. Share financial information about how a donation was used
- D. Work with Technion Israel to offer opportunities for donors to meet with Technion faculty/staff in-person or via video-call

3 - Celebrate planned giving and loyal donors [2020-2021]

- A. Create named membership societies for these two groups
- B. Use cost-effective and easy-to-execute acknowledgement tactics that are personalized for each group (e.g., special thank you letter, special nametags at events, distinct listing in annual report or online)
- C. Profile PG and loyal donors regularly in communications

Strategic Direction 6: Develop the best talent and resource for success

TC will need additional development and communications staff in order to focus on its major goals of engagement, awareness and fundraising in support of Technion Israel.

1 - Add professional staff to enhance ability to fundraise and build awareness

- A. Development Officer to focus on all Annual fundraising, intermediate giving (\$1,000 to \$10,000) events and volunteer strategy and support [2019-20]
- B. Development Officer to focus on major gifts (\$10,000+) [2020-21]
- C. Communications & Marketing Officer to focus on communications/marketing and donor relations [2020-21]
- D. Consider a half-time fundraising professional for Western Canada [2019-20]
- E. Bring on Montreal staff full-time [2020-21]
- F. Consider adding 2-3 development officers to focus on additional growth in annual, major and planned gifts, donor relations, volunteer management and events portfolios [2022-24]

2 - Add resources to the budget for cultivation and donor relations activities each year over the next 3 years

- A. Cultivation activities will include travel, materials, entertaining (travel to meet with potential/current/past donors should be booked in advance and follow an annual travel calendar for maximum benefit at minimum cost and to take advantage of opportunities to book engagement/alumni/other events around this work)
Suggested investment: \$50,000 – recognizing all of this may not be added in 2019-2020 but over the next 3 years
- B. Donor relations activities include acknowledgement, recognition and stewardship to ensure extraordinary relationships are being built with donors who support Technion
Suggested investment: \$25,000 – recognizing all of this may not be added in 2019-2020 but over the next 3 years
- C. Infrastructure around database reporting, data maintenance, professional development, events, research and other consulting/outsourcing fees.
Suggested investment: \$100,000 – recognizing all of this may not be added in 2019-2020 but over the next 3 years

Next Steps: Implementation Planning, Tactics & Measures

These new strategic priorities for Technion Canada's upcoming five years will guide the next steps in developing specific implementation plans. Under the guidance of the National Executive Director, the staff team will work closely with the Board and key volunteers to finalize tactics and achievable timelines and success indicators.

Time must be spent by the staff to complete the detailed tactics that will flow from the goals under each of the six strategic priorities. This work will take place over the next quarter (to be completed no later than January 2020). Key performance indicators should be developed to measure outcomes and impact.

Given the constantly changing nature of today's world, it is recommended that the plan be thoroughly evaluated after three years to ensure that outstanding goals are still relevant.

As Technion Canada works to achieve the strategic priorities within this plan and further develop its fundraising and awareness programs, it is anticipated that there will be:

- Significant growth in the general knowledge of the achievements and innovations of Technion Israel and how Technion Canada supports these;
- Increased financial support of the important work being done at Technion Israel leading to a stronger Israel and solutions to some of today's global issues;
- Increased financial support of Technion Canada's operations, resulting in the sustainability and longevity of the organization;
- Quality programming locally in key cities and nationally resulting in positive impact around engagement of Canadians across the country;
- Development of future solution-oriented leaders on the Technion Canada Board and committees through meaningful opportunities with TC;
- A trusted voice for the public in the translation of innovation coming from Technion to Canadians.

Technion Canada is poised for success as it embraces this plan for a strong future and a healthy and sustainable world.

Appendix A: Process Timeline & Participants

Review of financials, data, materials	June to August 2019
In-person and phone Interviews	July 22 to August 1, 2019
Online Survey (anonymous)	Deployed July 16, closed July 31
Board Retreat	September 8, 2019
Draft Plan provided to Technion Canada	September 27, 2019
Revisions and discussions of plan	October 2019
Approval of draft plan at Board Meeting	October 16, 2019
Delivery of final plan	October 31, 2019
AGM delivery of approved plan	November 10, 2019

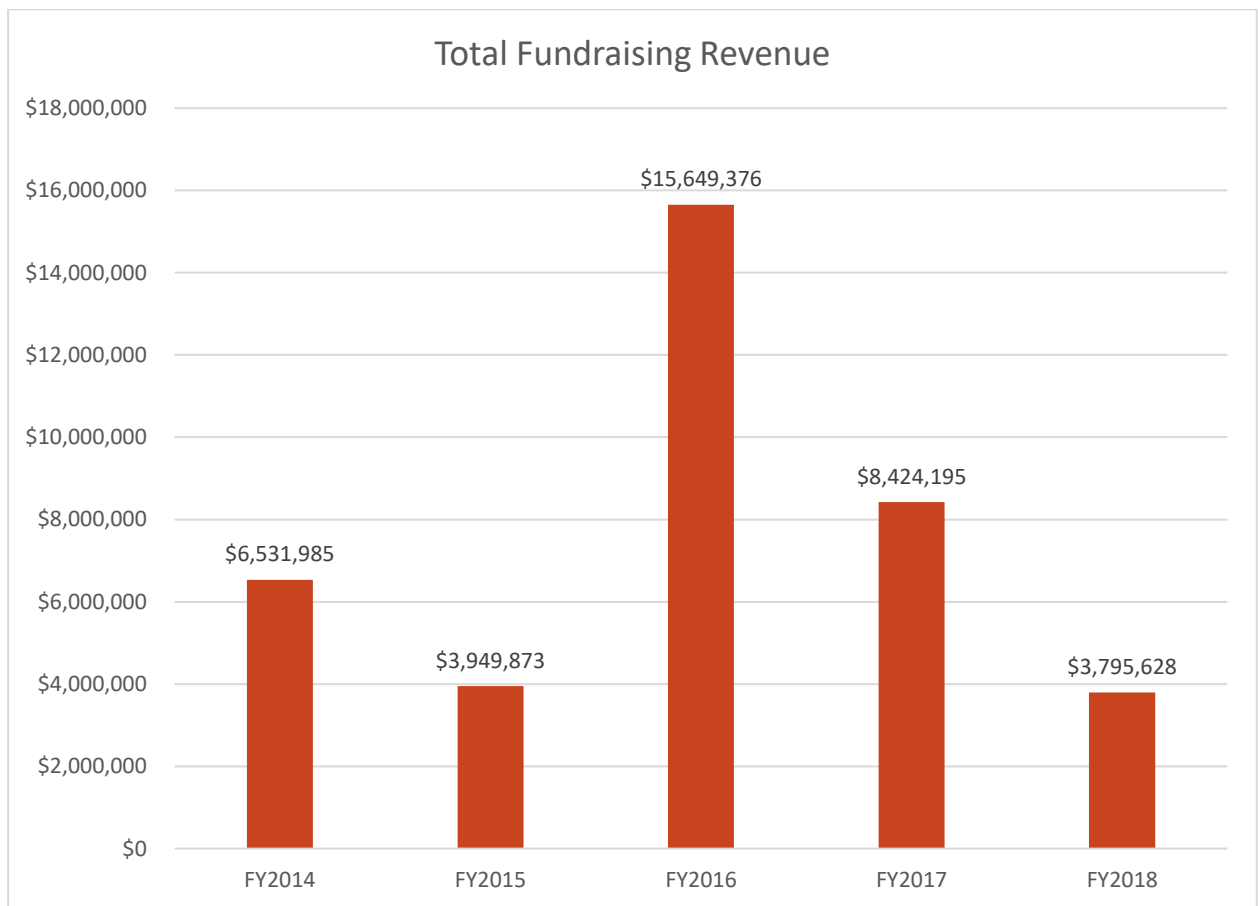
Thank you to all interview participants:

1. Ginny Bellwood
2. Aviva Goldenberg
3. Andrew Goldenberg
4. Harold Garfinkle
5. Elysa Greisman
6. Doreen Green
7. Ronnie Kaplan
8. Eric Levy
9. Dean Lurie
10. Edward Nagel
11. Irwin Tauben

Thank you to all Board Retreat participants:

1. Howard Berish
2. Steve Bramson
3. Judy Charney
4. Harold Garfinkle
5. Doreen Green
6. Elysa Greisman
7. Ronnie Kaplan
8. Pam Litman
9. Marvin Ostin
10. Eliot Phillipson
11. Paul Radacanu
12. Shonna Ross
13. Leesa Steinberg
14. Irwin Tauben

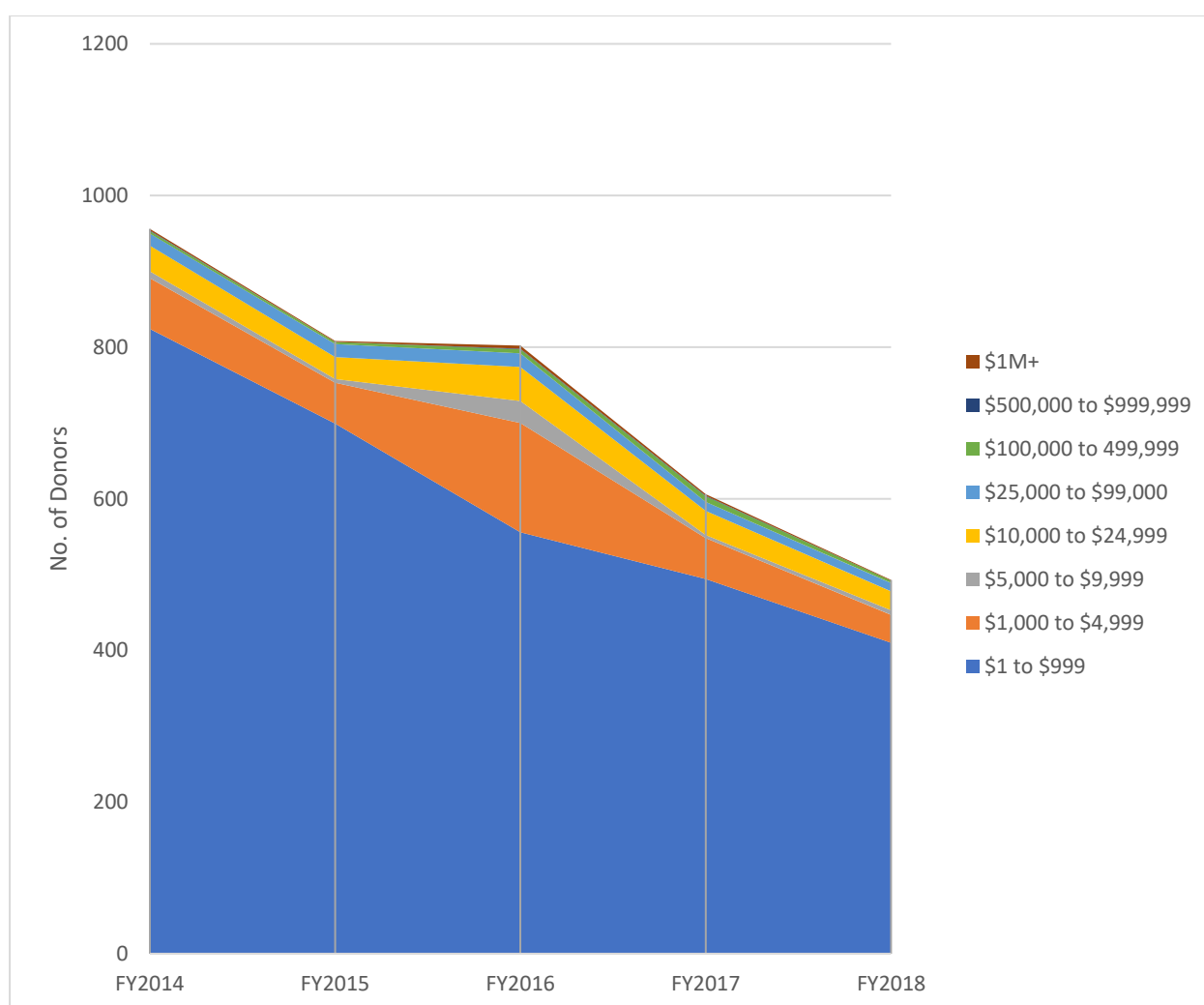
Appendix B: Total Giving 2014- 2019



Note: The significant increase in FY 2016 is largely due to a \$7.3M bequest.

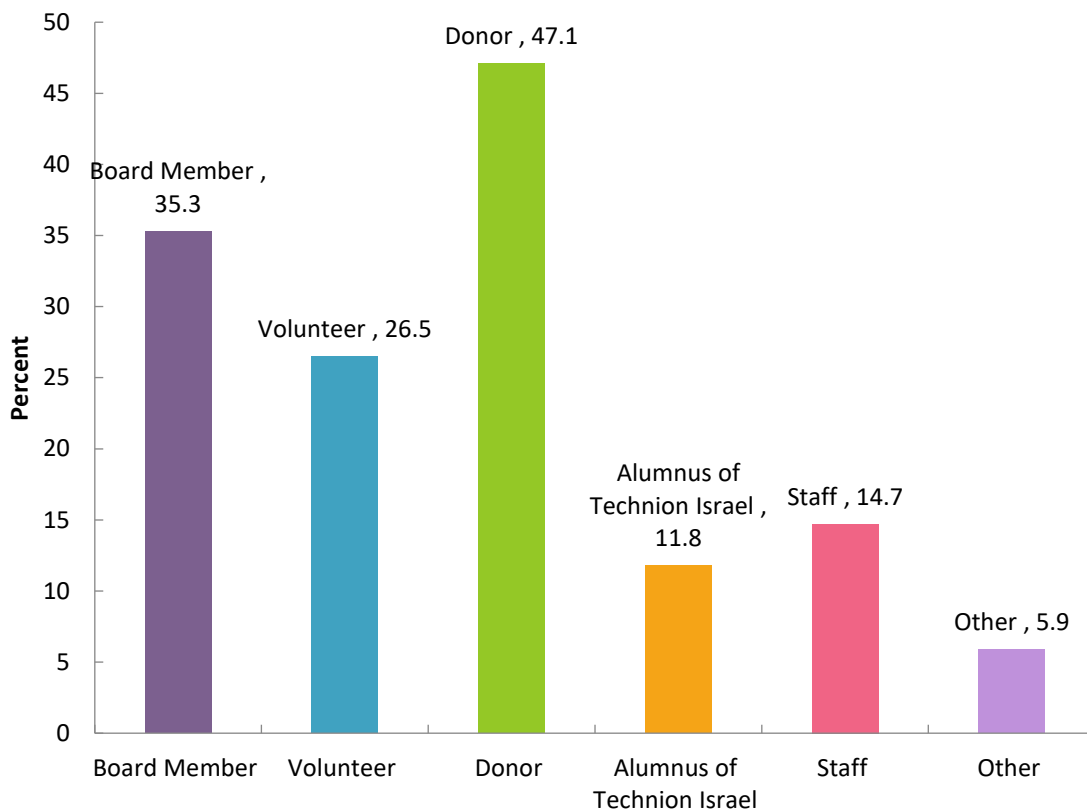
Appendix C: Number of Donors by Giving Level 2014 – 2019

	FY2014	FY2015	FY2016	FY2017	FY2018
Giving Level	Number of Donors				
\$1 to \$999	824	699	556	494	410
\$1,000 to \$4,999	67	54	144	54	37
\$5,000 to \$9,999	9	5	29	4	6
\$10,000 to \$24,999	34	29	45	32	25
\$25,000 to \$99,000	16	17	18	12	11
\$100,000 to 499,999	3	3	5	7	3
\$500,000 to \$999,999	1	0	1	1	0
\$1M+	2	1	4	2	1
TOTAL	956	808	802	606	493



Appendix D: Online Survey Report

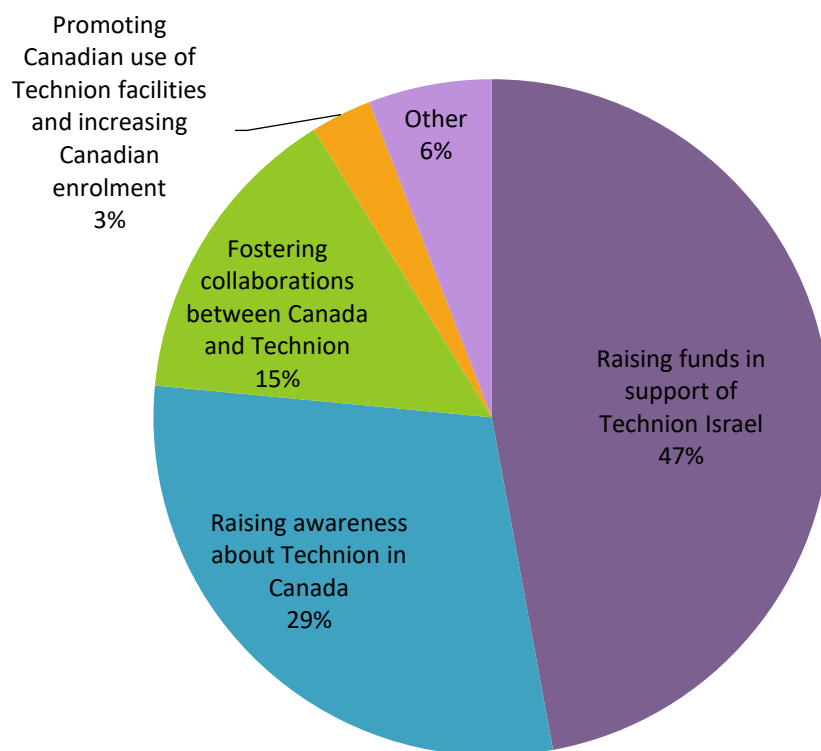
1. What is your affiliation with Technion Canada (TC)? Check all that apply.



Value	Percent	Count
Board member	35.3%	12
Volunteer	26.5%	9
Donor	47.1%	16
Alumnus of Technion Israel	11.8%	4
Staff	14.7%	5
Other	5.9%	2

Other	Count
Executive (VP)	1
national chair	1
Totals	2

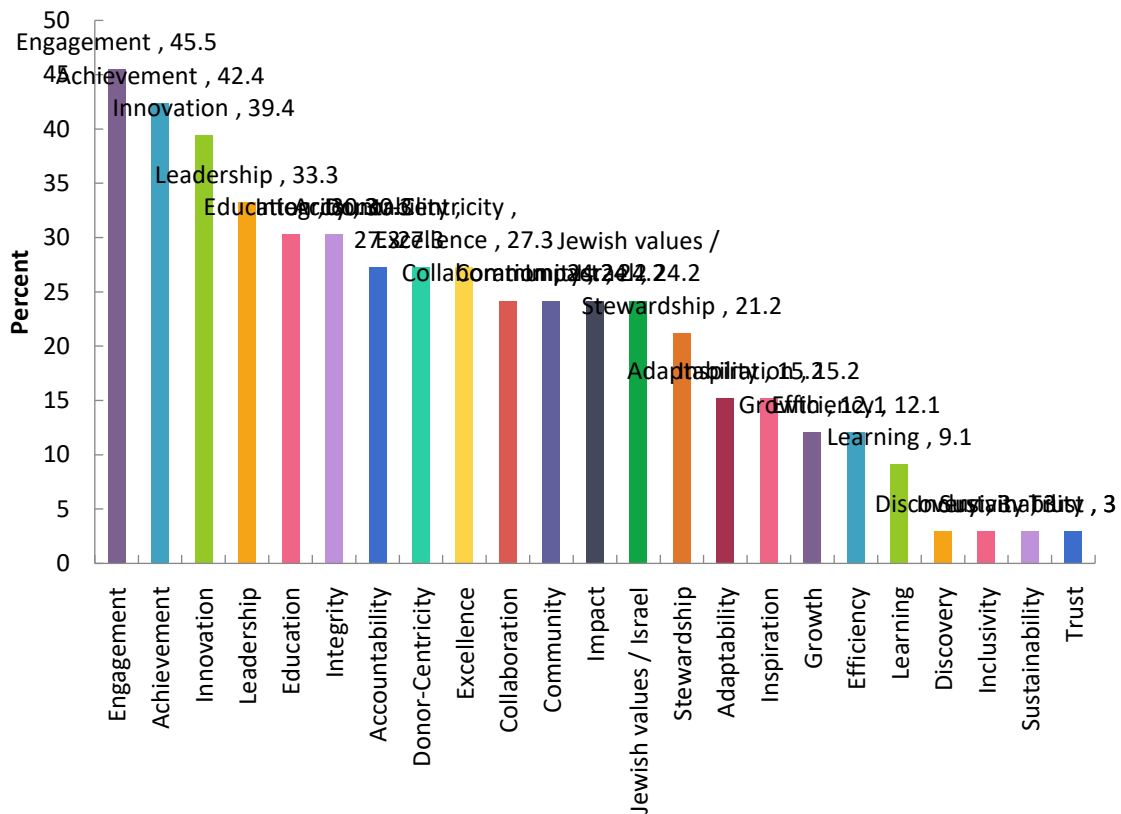
2.What do you see as the primary role of Technion Canada (TC)?



Value	Percent	Count
Raising funds in support of Technion Israel	47.1%	16
Raising awareness about Technion in Canada	29.4%	10
Fostering collaborations between Canada and Technion	14.7%	5
Promoting Canadian use of Technion facilities and increasing Canadian enrolment at Technion	2.9%	1
Other	5.9%	2
	Totals	34

Other	Count
Raising funds in support of Technion Israel - is primary role, but all of the above is part of the agenda!	1
Raising funds in support of Technion Israel, raising awareness about Technion AND promotion Canadian enrolment at Technion Israel	1
Totals	2

3.What do you believe are the top 5 values that TC should demonstrate in its work?



Value	Percent
Engagement	45.5%
Achievement	42.4%
Innovation	39.4%
Leadership	33.3%
Education	30.3%
Integrity	30.3%
Accountability	27.3%
Donor-Centricity	27.3%
Excellence	27.3%

Collaboration	24.2%
Community	24.2%
Impact	24.2%
Jewish values / Israel	24.2%
Stewardship	21.2%
Adaptability	15.2%
Inspiration	15.2%
Growth	12.1%
Efficiency	12.1%
Learning	9.1%
Discovery	3.0%
Inclusivity	3.0%
Sustainability	3.0%
Trust	3.0%

4. What do you believe are the top 5 values that TC should demonstrate in its work? - comments

Response
The sole reason for the existence of TC is simply one thing - raise money to enable Technion to thrive.
TC has to raise funds. The problem we have is that Technion is the best kept secret
I believe cooperation with technology institutions in Canada, both private and public is key to raising awareness in Canada and to recruiting high level donors.
Some of these values are implied in others - accountability is part of integrity, achievement and excellence are part of impact, leadership implies engagement and stewardship.
Raising awareness about Technion in Canada should help raise funds for Technion.
Promotion of Technion innovations is very important toward achieving TC goals.

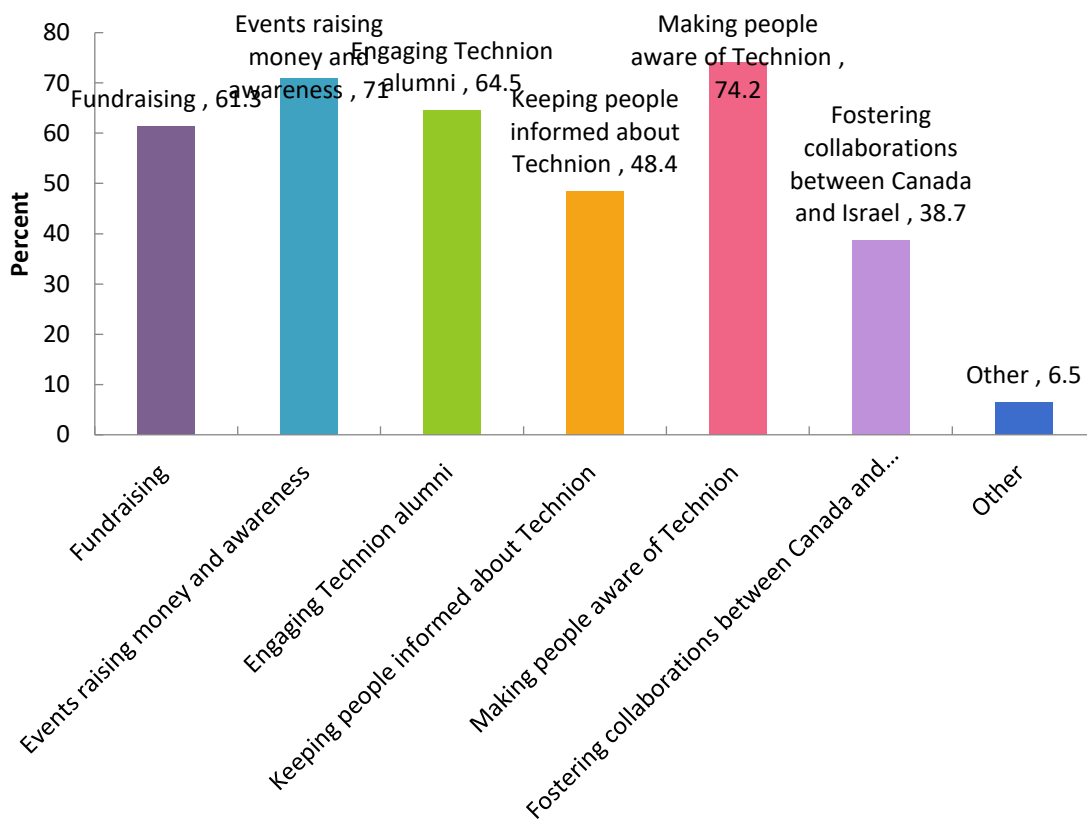
5.What activities does TC do well? Rank from 1 to 7 where 1 is the best.

Item	Overall Rank	Score	Total Respondents
Fundraising	1	126	24
Keeping people informed about Technion	2	122	21
Making people aware of Technion	3	97	21
Events raising money and awareness	4	87	20
Engaging Technion alumni	5	74	20
Fostering collaborations between Canada and Israel	6	72	19
Other	7	17	10

What activities does TC do well? Rank from 1 to 7 where 1 is the best. - comments

Response
This is based on previous leadership before Board power politics were entrenched. The toxic board culture resulted in several key resignations and decline in morale. Can't opine on present leadership.
Problem is we do not do much . We are supposed to raise money for Technion. The biggest problem is awareness. People just do not know about us.
Cannot write answer on this form
Personally, I don't think Technion Canada has done any of these exceptionally well
None of the above
Cannot rank some of the above activities.
I don't know

7. What areas need improvement?



Value	Percent	Count
Fundraising	61.3%	19
Events raising money and awareness	71.0%	22
Engaging Technion alumni	64.5%	20
Keeping people informed about Technion	48.4%	15
Making people aware of Technion	74.2%	23
Fostering collaborations between Canada and Israel	38.7%	12
Other	6.5%	2

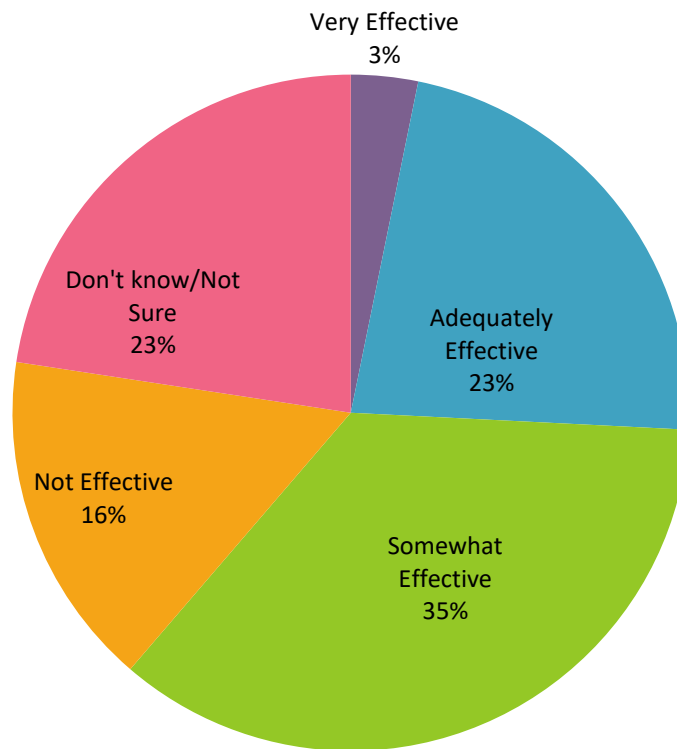
Other	Count
All items	1
Governance, Board involvement in Fundraising	1

8. What areas need improvement? - comments

Response

All areas need improvement. The primary goal is fundraising. To get there we need a good sales pitch and involving as many willing volunteers as possible..

9.What is your perception of TC's approach to raising funds for Technion Israel?



Value	Percent	Count
Very Effective	3.2%	1
Adequately Effective	22.6%	7
Somewhat Effective	35.5%	11
Not Effective	16.1%	5
Don't know/Not Sure	22.6%	7
	Totals	31

10. Do you perceive any potential challenges to TC's fundraising success?

Response
Few people are familiar with Technion.
The existing and toxic board culture. Lack of cohesiveness on the mandate of TC and focus on board composition from Montreal to unnecessarily and ineffectively dominate.
We have to learn how best to approach possible donors. I think we have to have different people trying to raise funds in all areas of Canada
Lack of broad awareness in the community of Technion and its achievements and importance for fostering the development of Israel
lack of consistency in fundraising in previous years playing forward to today has created a gap in supporters at all levels
1. The younger generation of Jews in Canada will increasingly be less inclined to donate on the basis of emotional and historic grounds. 2. The competition for philanthropic donations has become intense.
In the past, the lack of a clear plan left volunteers feeling aimless, unable to predict utility and future projects to engage in. A large team and consistent momentum (or quarterly events planned a year in advance) will fix that.
Very poor at maintaining volunteer relations and encouraging young leadership.
A lot of competition in Toronto / Canada for donor funds
Professionals both in Mtl and Toronto need to have the contacts and fund raising skills. Then the lay people will be motivated
Need to reengage old donor families - especially the next generation who are now the wealth holders and leadership from the top - by example - is key
We need to involve more volunteers to create a team approach. As well to involve people between the ages of 35 to 60
NEW EXECUTIVE AND STAFF
None fundamentally. It is a question of building the right leadership, the way Weizmann Inst. and other universities have done it. I believe Technion has an advantage over other universities due to its technical prominence.
Priorities of the current generation

New fund raising staff
Maintaining current donator base.
competition!!!!
Board's lack of understanding and participation in fundraising. Saturated market. Need more professional fundraisers on staff-can't expect the ED to do everything!
Many organizations in the same space, not a lot of name recognition leadership
do not know of any
The competition for \$ is very challenging.

11. What do you see as opportunities for increasing support for TC?

Response
Need to go after a younger demographic of supporters.
We have to be out there. emails, events, etc
More ideas are necessary on how to raise awareness and engagement of the community. To create a "marketing" campaign with measured indicators on before and after results.
tap in to alumni. seek out profitable commercial organizations that are using technion technology
The investment opportunities in Technion-related start-ups represents an increasing opportunity for Canadian investors, venture capitalists, and entrepreneurs.
Gather the troops at a large simple but well organized event - lay out what tastes need to be done and have everyone pick one or more as their committee duties. Post the list publicly on social media and make the relaunch a big deal while showing brand consistency
Increased community engagement
Significant aging baby boomers with tremendous wealth. Arguably, the largest transfer of wealth in history. Need to engage both the baby boomers and their beneficiaries so that they are on board with TC/Technion Israel now as they draft their wills and do succession planning.
Collaboration with ATC on which speakers are available to come to both cities and excite the audience on Technion's achievements
Other public institutions (outside the typical Jewish milieu) and key community persons to spread our name / needs
More exposure through marketing and social media. More volunteers to solicit and open doors to contracts
MORE PUBLIC EVENTS FEATURING TECHNION INNOVATIONS.
Bringing key lecturers to discuss groundbreaking research to increase interest. Also drawing local technical and financial leaders to serve.
FUND raising events that are fun and innovating and INSPIRING
Aligning priorities
Expanded activity in the West

Increasing awareness in the community.

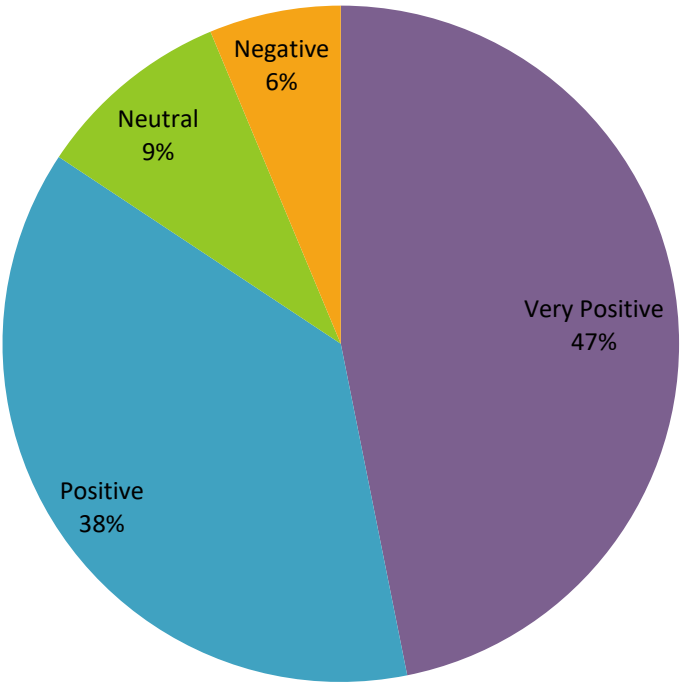
Younger generation, 40-55 year olds, specifically who are involved in start ups or tech. Reaching out to older generation, 60-80 years who are Zionists and Israel supporters.

Bring some big names onto the board

interesting lectures to make people aware of Technion's achievements

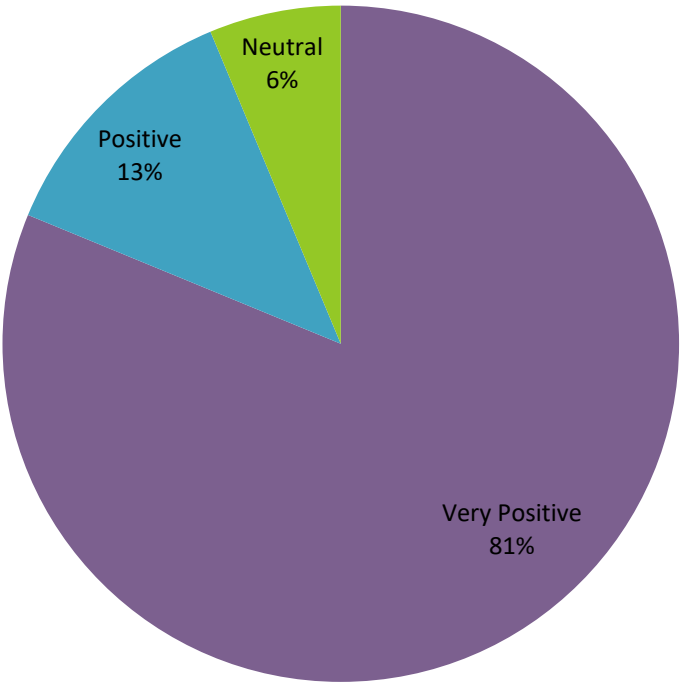
Technion academics visiting Canada

12.How would you describe your current overall attitude toward Technion Canada?



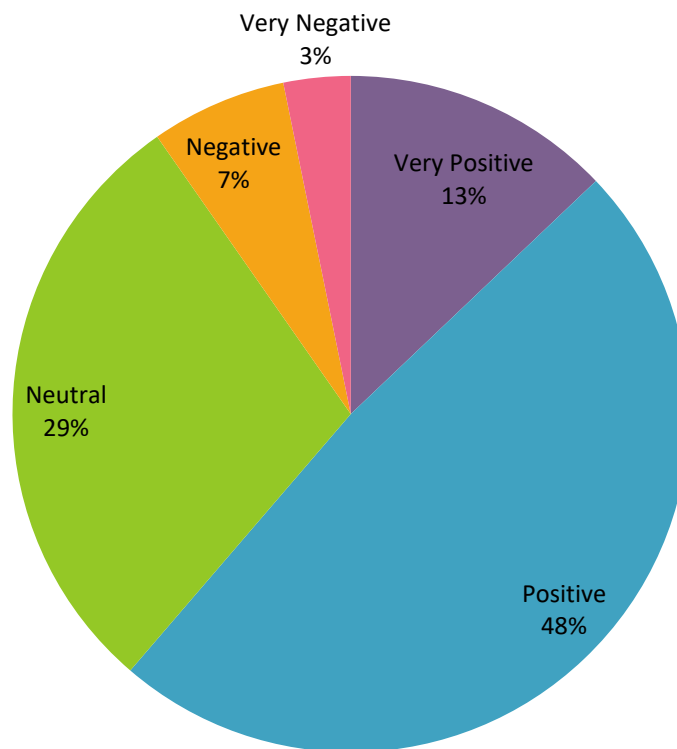
Value	Percent	Count
Very Positive	46.9%	15
Positive	37.5%	12
Neutral	9.4%	3
Negative	6.3%	2
	Totals	32

13.How would you describe your current attitude toward Technion – Israel Institute of Technology?



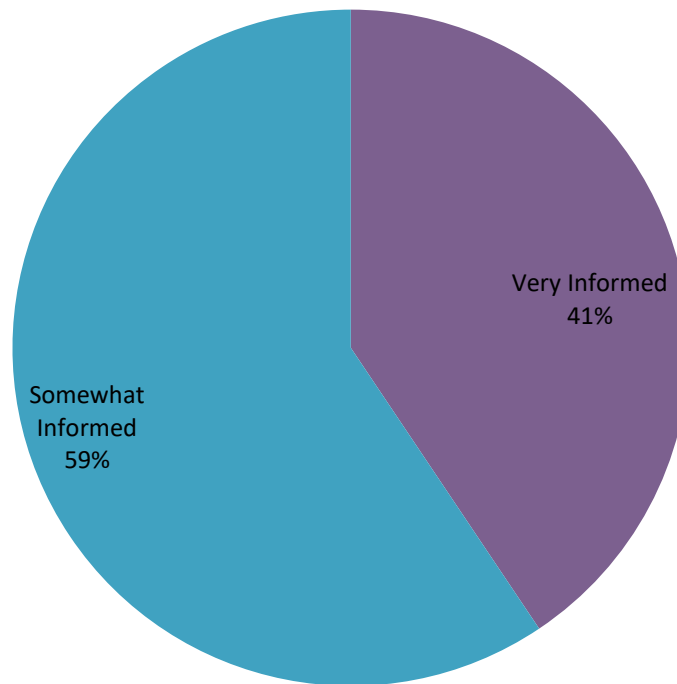
Value	Percent	Count
Very Positive	81.3%	26
Positive	12.5%	4
Neutral	6.3%	2
	Totals	32

14.What is your perception of TC's public reputation?



Value	Percent	Count
Very Positive	12.9%	4
Positive	48.4%	15
Neutral	29.0%	9
Negative	6.5%	2
Very Negative	3.2%	1
	Totals	31

15. Based on the materials that you receive and your communications, how informed are you about Technion Canada and Technion Israel?

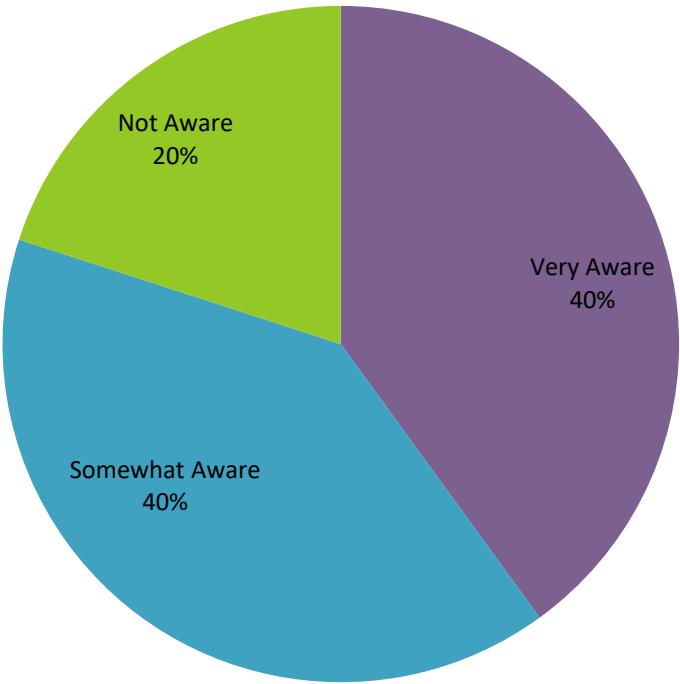


Value	Percent	Count
Very Informed	40.6%	13
Somewhat Informed	59.4%	19
	Totals	32

16. Based on the materials that you receive and your communications, how informed are you about Technion Canada and Technion Israel? - comments

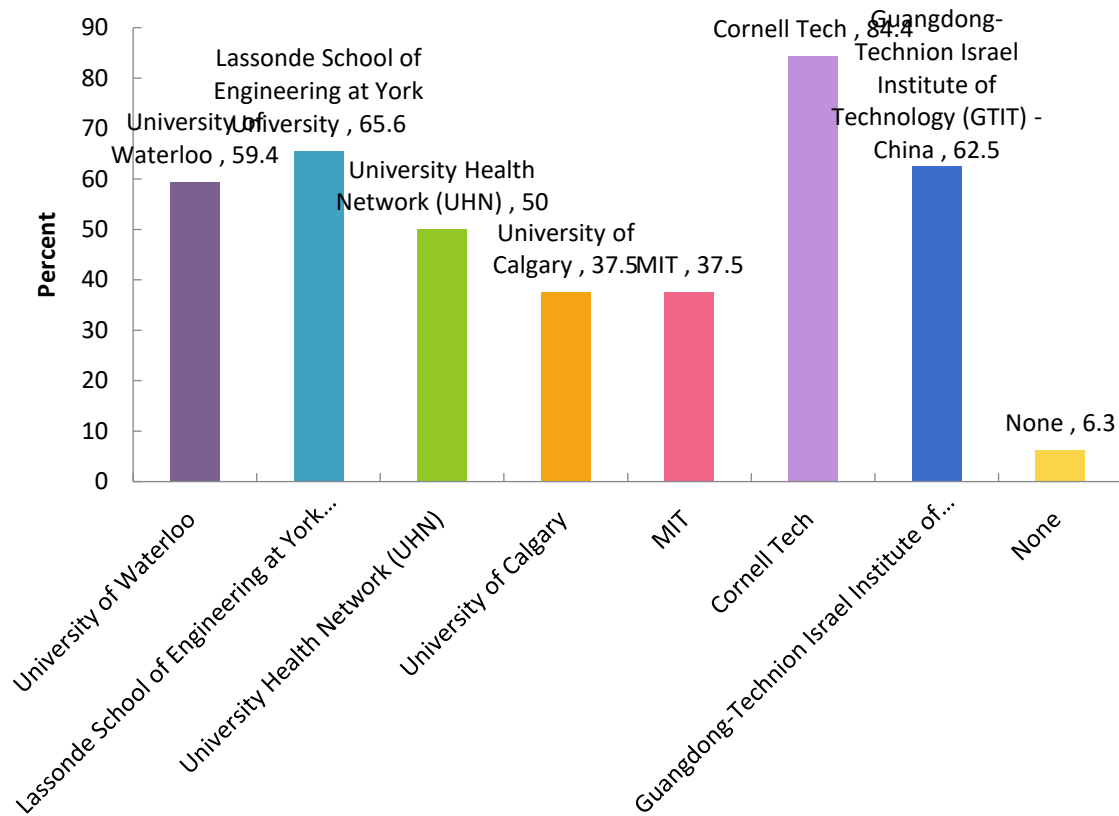
Response
I am very informed because I have been national chair for many years.
Sorry previous items are mistakenly reviewed
I'm informed because I put the hours and efforts to stay informed.

17.Are you aware of Technion’s Canadian and international partnerships?



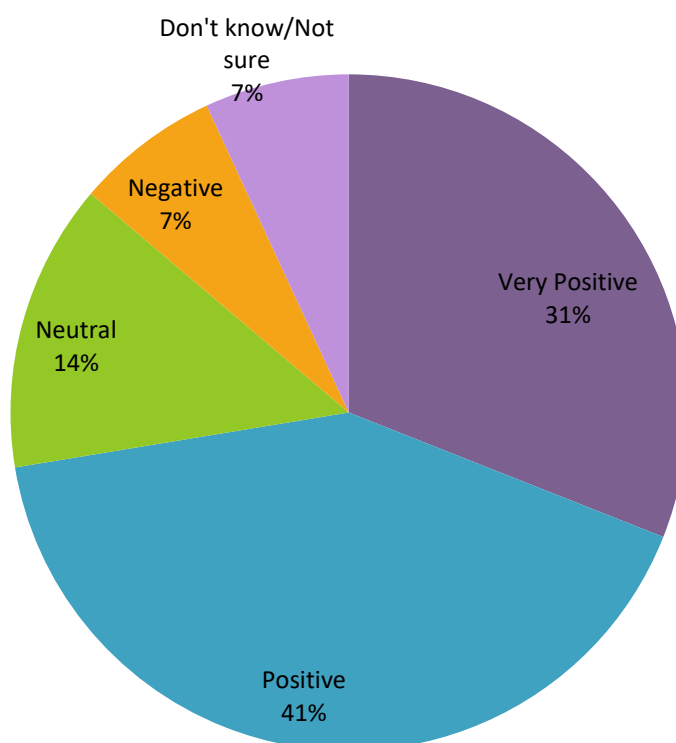
Value	Percent	Count
Very Aware	40.0%	12
Somewhat Aware	40.0%	12
Not Aware	20.0%	6
	Totals	30

18.I have heard of the following Technion partnerships:



Value	Percent	Count
University of Waterloo	59.4%	19
Lassonde School of Engineering at York University	65.6%	21
University Health Network (UHN)	50.0%	16
University of Calgary	37.5%	12
MIT	37.5%	12
Cornell Tech	84.4%	27
Guangdong-Technion Israel Institute of Technology (GTIT) - China	62.5%	20
None	6.3%	2

19. What is your perception of the quality and effectiveness of professional staff at TC?

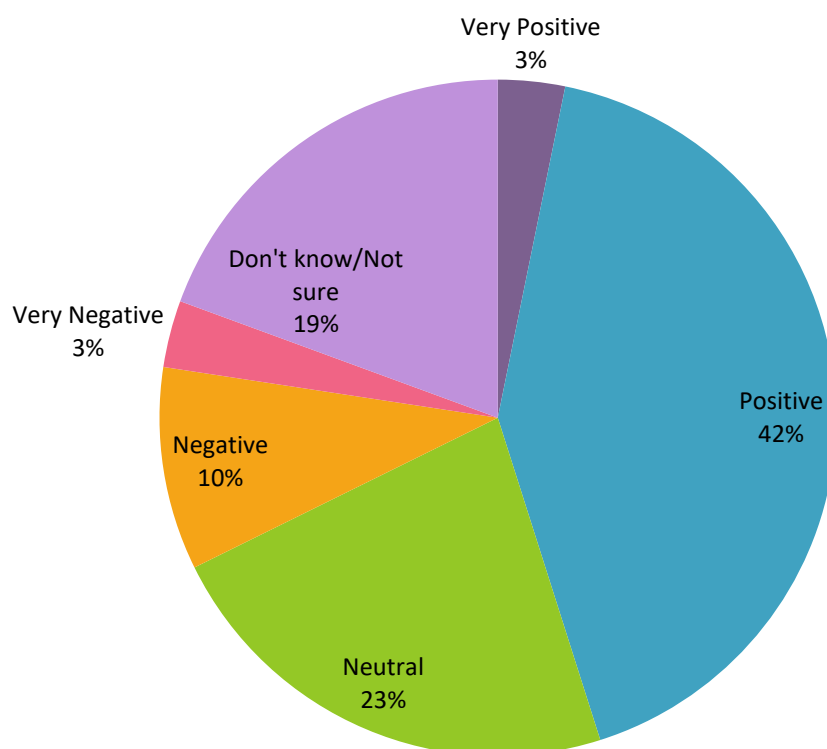


Value	Percent	Count
Very Positive	31.0%	9
Positive	41.4%	12
Neutral	13.8%	4
Negative	6.9%	2
Don't know/Not sure	6.9%	2
	Totals	29

20. What is your perception of the quality and effectiveness of professional staff at TC? - comments

Response
New leadership! Fresh perspective.
we need more staff perhaps. We have a great new executive director but she cannot do it all on her own
Given the recent changes in professional staff, it is too early to form a definitive opinion, but my initial perceptions are positive.
I had a phenomenal experience when I was in Montreal working with Anne Kalles. She encouraged my involvement and engagement with Technion Canada. As soon as I moved back to Ontario, I had nothing but negative interactions with the staff when I was volunteering for the Technion Gala, though much of my negative interaction was due to lack of support and information provided to the administration.
Elysa has brought new life and energy to TC. She's engaging staff and bringing in people where needed to support the organization. I am very optimistic about our future under her leadership.
A new group of leaders and implementation team is poised to go after donors - board members and their contacts and use innovative means of broadening TC outreach to the Jewish and overall communities
TO THE NEW EXECUTIVE AND STAFF
Anne Kalles served admirably and knew our community and how to stay in touch
contains multiple and deep issues

21. What is your perception of the quality and effectiveness of the Board and volunteers at TC?

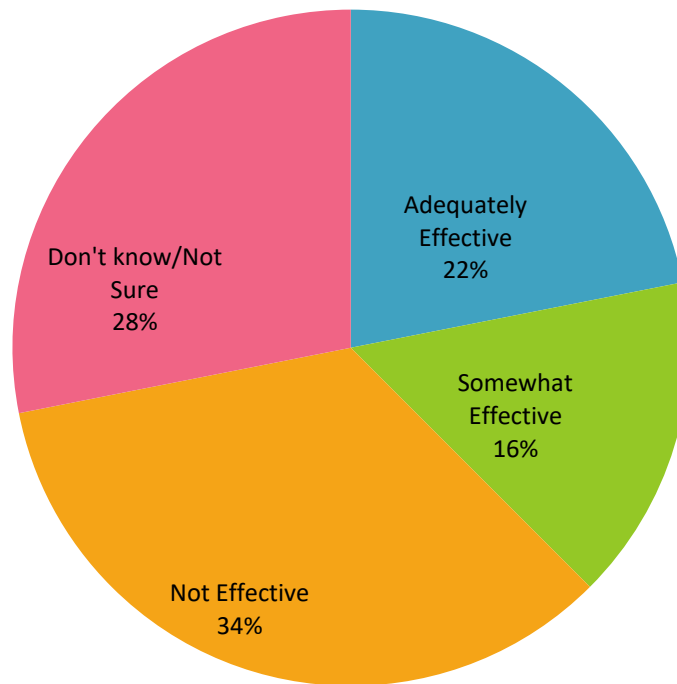


Value	Percent	Count
Very Positive	3.2%	1
Positive	41.9%	13
Neutral	22.6%	7
Negative	9.7%	3
Very Negative	3.2%	1
Don't know/Not sure	19.4%	6
	Totals	31

22.What is your perception of the quality and effectiveness of the Board and volunteers at TC? - comments

Response
Lots of talk!
Board composition, politics, and in-fighting is toxic and created material resignations and leakage.
board does not do much We have been trying to get them more engaged.
Some are very engaged and effective, others much less so.
Generally a caring board committed to TC and Israel - in need of direction from the ED and follow up by her staff to engage more fully day to day and "mine" their contacts as future donors / legacy contributors
contains multiple and deep issues

23. How effective is the Generation Next committee at promoting awareness and financial support for Technion with young leaders?



Value	Percent	Count
Adequately Effective	21.9%	7
Somewhat Effective	15.6%	5
Not Effective	34.4%	11
Don't know/Not Sure	28.1%	9
	Totals	32

24.How effective is the Generation Next committee at promoting awareness and financial support for Technion with young leaders? - comments

Response

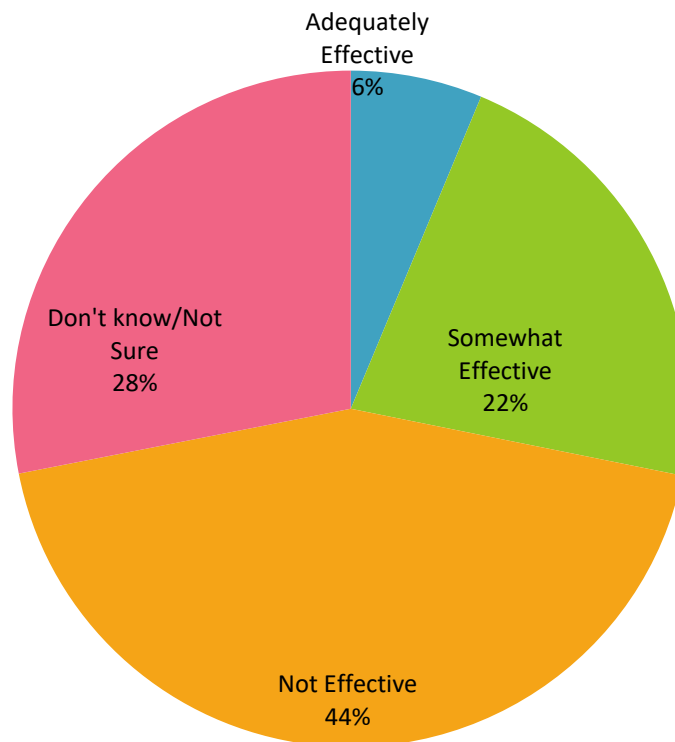
The energy and excitement has dissipated in the last 2 years.

hard to get people involved and stay involved

I was very involved in Generation Next in Montreal, expressed interest when I moved to Toronto, spent a lot of time volunteering for the gala and received ZERO follow-up. I am no longer interested in getting involved with Generation Next until it is a functional committee as I was so turned off at all of my interactions.

This needs either a restart or integration in TC overall with a combined overall focus on more effective means of engagement and activity in TC

25.How effective is the alumni group at promoting awareness and support for Technion?



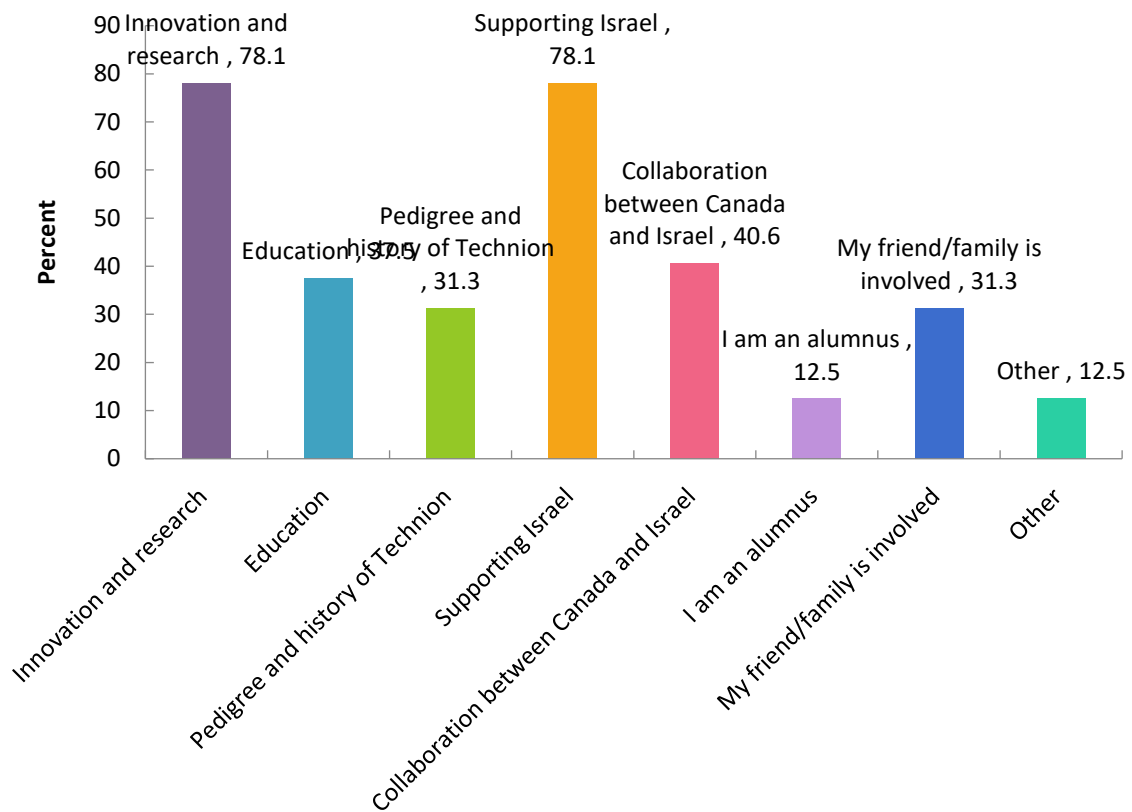
Value	Percent	Count
Adequately Effective	6.3%	2
Somewhat Effective	21.9%	7
Not Effective	43.8%	14
Don't know/Not Sure	28.1%	9
	Totals	32

26.How effective is the alumni group at promoting awareness and support for Technion? - comments

We need to start projects for them that interest them - without a focus on fundraising from that group directly (that will come naturally over time) - Use their talents and knowledge to help tell our story to a wider group

It should improve with more personal contacts, activities, events, get-together, email, Facebook, LinkedIn, ...

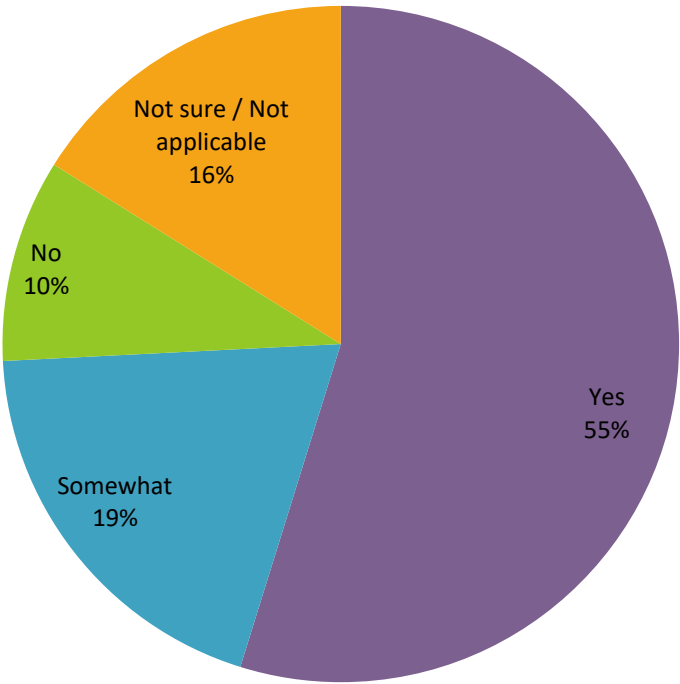
27. What are your reasons for supporting Technion?



Value	Percent	Count
Innovation and research	78.1%	25
Education	37.5%	12
Pedigree and history of Technion	31.3%	10
Supporting Israel	78.1%	25
Collaboration between Canada and Israel	40.6%	13
I am an alumnus	12.5%	4
My friend/family is involved	31.3%	10
Other	12.5%	4

Other	Count
I am staff	1
Leverage (results align with the impact I want to see)	1
staff member	1
Totals	3

28.Do you feel valued as a donor?

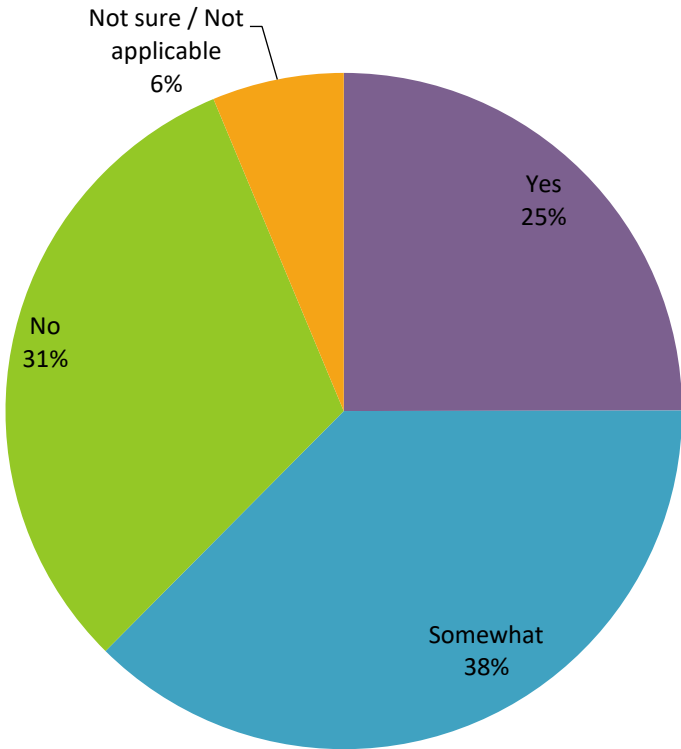


Value	Percent	Count
Yes	54.8%	17
Somewhat	19.4%	6
No	9.7%	3
Not sure / Not applicable	16.1%	5
	Totals	31

29. Comments - if you have thoughts on how TC could make you feel more valued and connect you to the impact of your gifts, please provide more info:

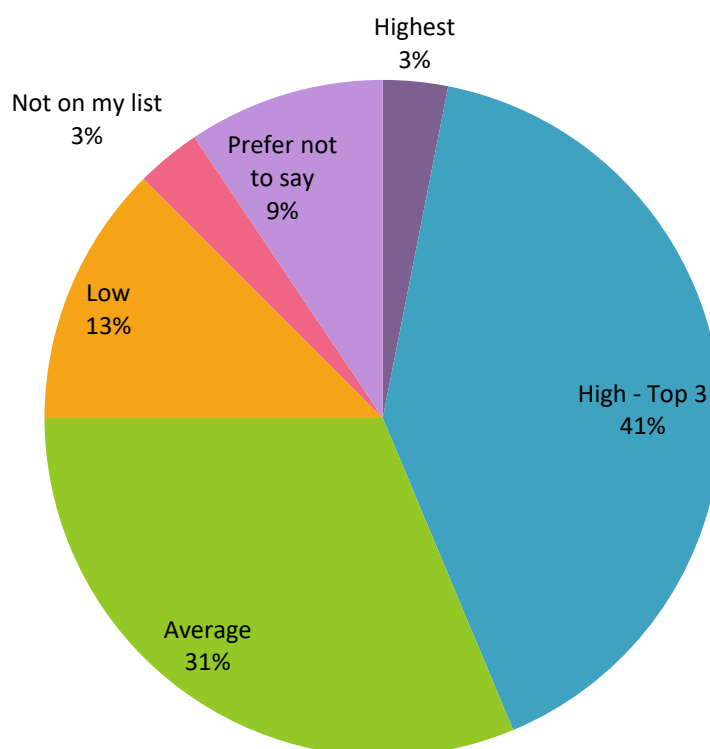
ResponseID	Response
13	Agree on a common mandate, outreach, and communicate the commercial value of Technion to the global tech community.
30	As long as the large donors feel valued, all is well
33	Any sort of follow-up would have made me feel more valued or connected.
37	Depending on size of gift a progress report should be sent to donor
39	In general - reporting on where and when monies raised in Canada are utilized in Israel and how we efficiently use funds raised in Canadian operations
40	Major Donors need to have contact a few times a year, to make them feel appreciated
45	My small contribution each year are. A drop in the bucket, I do not need to be valued for this other than my own awareness that in a small way I am helping this great institute
57	1. I would like to see my grandchildren attending some courses at Technion. 2. I should get a better sense of how my gift would help BSc, MSc, PhD students to achieve their goals.

30.Do you feel you know how donations are spent?



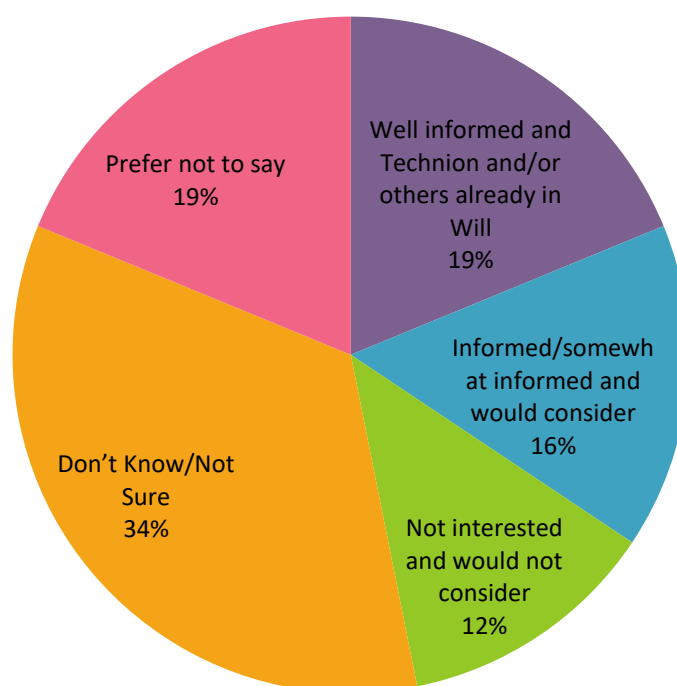
Value	Percent	Count
Yes	25.0%	8
Somewhat	37.5%	12
No	31.3%	10
Not sure / Not applicable	6.3%	2
	Totals	32

31. Where does Technion rank in your personal philanthropic priorities?



Value	Percent	Count
Highest	3.1%	1
High - Top 3	40.6%	13
Average	31.3%	10
Low	12.5%	4
Not on my list	3.1%	1
Prefer not to say	9.4%	3
	Totals	32

32. How informed are you about planned giving (legacy gifts)? Is this something you have thought about for Technion or other organizations?



Value	Percent	Count
Well informed and Technion and/or others already in Will	18.8%	6
Informed/somewhat informed and would consider	15.6%	5
Not interested and would not consider	12.5%	4
Don't Know/Not Sure	34.4%	11
Prefer not to say	18.8%	6
	Totals	32

33. What do you hope Technion Canada can achieve in the next 5 years?

Response
Raise more money, draw fresher lay leadership (more like the young guy on the board; I think his name is Steve)
Outstanding leadership. Focused and properly composed board with altruistic objectives. Significant fundraising - \$5M-\$10M / yr.
Become a household name. Want a great board. More donors
encourage collaborations between researchers and making them aware of existing incentives
Sufficient awareness so that new donors can include Technion in their plans
Establish a growth plan, starting with raising awareness in the community.
with vision and planning and the right team of fundraisers technion Canada will return to been a major contributor to technion israel
It is important that in the coming years, Technion Canada broaden its mandate and focus beyond traditional philanthropy, to include investment and business opportunities. Such a change will expand its potential "community" and lead to considerably more "fundraising" than will philanthropy alone.
Stabile Growth
1) Increase awareness 2) Increase transfers to Israel 3) Increase number of students going to Israel 4) Engage the younger generation(s)
More awareness and better fundraising opportunities
Create a solid base of supporters who give significant annual donations and in turn spread our name to their associates - energize and expand our base
Greater exposure-More funds raised for critical needs. Expansion of the volunteer base
GREATER PUBLIC AWARENESS IN CANADA AND TO ENGAGE YOUTH THAT VISIT ISRAEL ON BIRTHRIGHT TRIPS ETC.
promoting israel
Build new leadership and raise its game considerably

To be more able to enlist and "grow" willing people to help in gala making or other fund raising events.

General awareness in Canada leading to proud significant gift givers

Donations raising and transfer to the the Technion of \$15 per year

Increased awareness and larger donor base. More collaboration with Canadian industry.

Strong Board, increase in number of donors including younger generation, expand beyond Toronto & Montreal to other areas of Canada, raise \$5million/year

Increased awareness of the incredible calibre of education, research and innovation that exists at Technion Israel Bring more influencers onto the Board to bring in new donors and volunteers

Be on target on fundraising.

