

Sustaining Sacred Community Study

Summary of Findings & Recommendations

May 4, 2020

Background: Following a successful building renovation and campaign, Beth El leaders asked: *How can Beth El ensure it is financially sustainable for the long-term in light of evolving membership needs, growth, and a desire to fully live into our mission?*

Beth El Mission: Be a pluralistic and diverse congregation welcoming all who wish to enjoy an enriching experience through spiritual growth, observance, and mitzvot.

Study Objectives:

- Explore and increase congregational awareness of Beth El's financial needs;
- Engage members to consider how they can help with Beth El's sustainability;
- Identify effective funding approaches aligned with Beth El's values; and
- Develop enthusiastic, well-informed member leaders for ongoing financial stewardship efforts.

Process:

- **Convened Working Group** who met over six months to study historical and contemporary perspectives on membership engagement and faith community financial sustainability. [Working Group: Nathan Bearman, Alan Friedman, Norma Gindes, Valerie Glassman, Debbie Goldstein, Lauri Klein, Syd Miller, Susan Springer, and Leslie Winner; facilitated by moss+ross consultants Wes Brown and Brooke Jenkins]
- **Interviewed 20 households** representing a cross-section of Beth El.
- **Conducted Online Survey** of remaining Beth El members – 218 Beth El households responded (51.3% response rate, which is one of the strongest response rates moss+ross has observed in surveying organizations in recent years).
- **Developed Findings and Recommendations** with input and feedback from the Working Group.

Key Findings:

- **A core value for Beth El is being welcoming to all** – members experience a sense of community, warmth, and welcoming at Beth El and view the community as inclusive, diverse, tolerant, open, and flexible.
- **Most frequently noted Beth El strengths:** strong commitment to Jewish education, particularly for young people; talents and dedication of the rabbinical and administrative staff; and variety and depth of programming and ritual services.
- **Top reasons people support Beth El:** fostering synagogue community; ensuring the financial stability of current operations and programming; competitive salaries for staff; ritual and religious services; and children's/youth education and engagement.
- **There is a general lack of knowledge about Beth El's budget:**
 - More transparency desired around financial needs and what Dues and Annual Fund gifts support.
 - Approximate \$1 million budget divided by total number of Beth El households (423) = Average of \$2,500 cost per household.
 - Dues cover less than 2/3 of total expenses.
 - Tuition and fees cover less than 1/3 of total children's and youth programming expenses.
 - 1/4 of households are unable to pay full Dues.

- **There is not a strong desire to change the Dues model for Beth El.**
 - Current Dues and Talmud Torah tuition levels are viewed as reasonable, particularly with abatement options available for those in financial need.
 - Other synagogue funding models were explored (e.g., fair share or voluntary giving).
- **There is a general lack of awareness around the need for the Beth El endowment**, along with the logistics of how this endowment works.

Key Recommendations:

- **Systematically increase voluntary financial support** in order to sustain goals of being welcoming to all, keeping Dues affordable, and sustaining Beth El's array of offerings.
- **Engage members in learning about sustaining Jewish community.**
 - Offer gatherings, learning sessions, and one-on-one visits focused on views regarding money and spirituality.
 - Expand prospective and new member engagement activities such as quarterly gatherings.
 - Share a *Narrative Budget* (see attached sample) describing expenses and revenues in terms of Beth El core values and mission.
- **Enlist volunteer leaders in annual planning/implementation of coordinated fund development efforts.**
 - Development, Membership, and Finance committee leaders meet together at least twice each year to synchronize goals and appeals.
 - All Board and Development Committee members engage annually in top prospect/donor conversations.
 - Continue to seek 100% support from the Board for financial appeals.
 - Move timeline up to complete Dues appeals by October 1 and Annual Fund commitments by December 31 so there is more time for additional personalized follow-up with members to meet financial goals.
- **Follow best practices in donor acknowledgement and recognition.**
 - Send thank you notes within one week to each donor (same for Dues, stock, endowment, Life & Legacy gifts).
 - Personalize thank you notes (e.g., engage Board, Development Committee, and children/youth in process).
 - Offer special events honoring donors and volunteers.
 - Create a Beth El Legacy Society for endowment gifts.
- **Develop engagement plans to grow endowment.**
 - Set goals for total to be raised and number of commitments per year.
 - Offer FAQs/info sessions on endowment and planned giving.
 - Recruit a task force of young congregants to engage younger generations in endowment and/or planned giving.
 - Share testimonials and donor impact reports.
- **Use personalized fundraising strategies** for meeting funding goals.
 - Identify members (and other Beth El friends) with greatest capacity/interest in supporting Beth El initiatives (e.g., Invite Talmud Torah parents and grandparents to make an Annual Fund contribution that "passes forward" the educational experience to new generations.)
 - Have "one-on-one" conversations to explore members' interests.
 - Invite specific levels of support based on Beth El needs and members' capacity and interests.
 - Use tools like a *Gift Chart* to help identify number and size of gifts needed to reach goals.
- **Explore the revenue potential for leasing synagogue property:** Convene a committee of Beth El leaders to determine the goals of use for these spaces, develop policies, and propose fee structure for renting these spaces.