



May 2020

Sustaining Sacred Community

Best Practices for Financial Strength

Wes Brown

Brooke Jenkins



Background

Beth El Mission:

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

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?”

Planning Objectives

Beth El's *Sustaining Sacred Community* planning process was designed to:

- 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
- Develop informed **member leaders** for ongoing financial stewardship efforts

Process

(Sept. 2019 - Feb. 2020)

- **Convened Working Group** who met over six months to study historical and contemporary perspectives on membership engagement and faith community financial sustainability
- **Interviewed 20 households** representing a cross-section of Beth El
- **Conducted Online Survey** of remaining Beth El members
 - 218 households responded (51.3% response rate)
 - This is one of the strongest response rates moss+ross has observed in surveying organizations in recent years!
- **Developed Findings and Recommendations** with input from Working Group



Working Group

A team eager to provide wisdom and leadership
for Beth El's ongoing financial sustainability

Nathan Bearman

Alan Friedman

Norma Gindes

Valerie Glassman

Debbie Goldstein

Lauri Klein

Syd Miller

Susan Springer

Leslie Winner



Key Findings

- Core value for Beth El is **being welcoming to all**
- Strong commitment to **Jewish education**
- Widespread appreciation for talents and dedication of **rabbis and other staff**
- General lack of knowledge about Beth El's **Budget**
 - ~\$1M budget divided by 423 households = Avg. **\$2,500 cost per household**
 - Dues cover less than 2/3 of total expenses
 - Tuition and fees cover less than 1/3 of children's/youth programming
 - 1/4 of households are unable to pay full Dues
- Not a strong desire to change **Dues model** for Beth El
 - Other synagogue funding models considered (e.g., fair share, voluntary commitment, & partnership levels)

Key Recommendations

In order to remain welcoming to all, keep dues affordable, and sustain Beth El's array of offerings...
systematic efforts to raise support beyond Dues (voluntary giving) must increase!

Key Recommendations

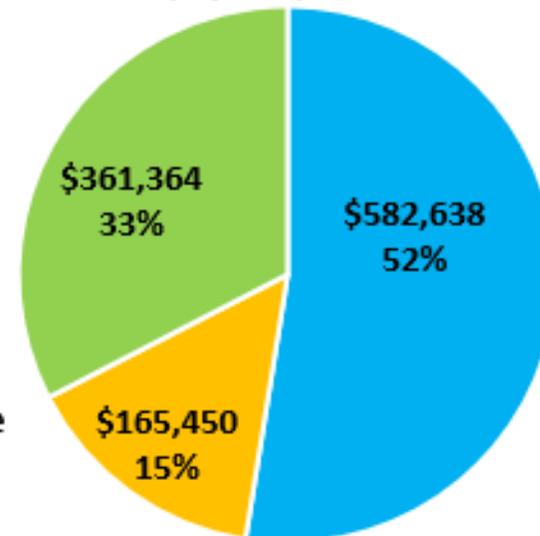
Engage members in learning about sustaining Jewish community

- Small gatherings, learning sessions, and one-on-one visits
- Board and other members lead these conversations
- Share a *Narrative Budget* with members

FYE May 31, 2021 Projected Expenses

\$1,109,452

- Member Ritual Life, Pastoral Care, Programming, & Engagement
- Children's/Youth Education & Engagement
- Secure, Maintained, & Welcoming Synagogue



Key Recommendations

Coordinate Fund Development Efforts

- Move timeline up to complete Dues appeals by Oct. 1 and Annual Fund commitments by Dec. 31 so there is more time for personalized follow-up to meet goals
- Regular meetings by leaders from Finance, Dues, Annual Fund, and Life & Legacy committees to synchronize goals and appeals

Key Recommendations

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
- Share testimonials and donor impact reports

Key Recommendations

Use personalized strategies for meeting goals

- Identify members (and other BE friends) with greatest capacity/interest
- Have conversations to explore members' interests
- Invite specific levels of support based on needs and members' capacity
- Use *Gift Chart* to help identify number and size of gifts needed to reach goals

Sample Gift Chart

\$200,000 FYE 2021 Annual Fund Goal

More than \$180,000 raised in gifts (beyond Dues) in FYE 2020

Minimum Gift	# of Donors Needed	Gift Subtotals Needed
\$20,000	1	\$20,000
\$15,000	3	\$45,000
\$10,000	4	\$40,000
\$5,000	8	\$40,000
\$2,500	10	\$25,000
\$1,000	15	\$15,000
Up to \$1,000	150	\$15,000
Totals	191	\$200,000

Conversations already underway with members considering increased gifts in FYE 2021 & 2022

Fundraising During COVID-19

In challenging social, political, and economic times, faith-based organizations with a mature and thoughtful sense of purpose continue to need, seek, and receive generous financial support

- It is essential to communicate and share stories about how Dues, Annual Fund, Life & Legacy and other appeals provide the resources that allow Beth El to meet the community's spiritual, emotional, and physical needs
- We have confidence in Beth El's ongoing sustainability because of its:
 - Consistently strong leadership
 - Track record of success
 - Growing community focused on Jewish faith & practice
 - Outstanding facilities

*Investments in our faith community express
what we value and who we understand ourselves to be*

תהלים 117 Psalms Chapter 117

א 1 O praise the LORD, all ye nations; laud Him, all ye peoples.
שְׁבַחֵהוּ, כָּל-הָאֲמִים; הַלְלוּ אֶת-יְהוָה, כָּל-גּוֹיִם;

ב 2 For His mercy is great toward us; and the truth of the LORD endureth forever.
וְאֶמֶת-יְהוָה לְעוֹלָם; כִּי גָבַר עָלֵינוּ, חַסְדּוֹ-- הַלְלוּ-יְהוָה.
Hallelujah.



***Thank you for the opportunity to
partner with Beth El!***

