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# SYNERGY

INNOVATIONS AND STRATEGIES FOR SYNAGOGUES OF TOMORROW

## CONNECTION, CULTIVATION, AND COMMITMENT: NEW INSIGHTS ON VOLUNTARY DUES

Prepared by:  
Lianna Levine Reisner  
Rabbi Dan Judson, Ph.D  
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**For the last few years, UJA-Federation of New York**, through its SYNERGY department, has been identifying and examining the attributes that help synagogues to thrive.

Members of thriving synagogues often share many of the same experiences. They have a strong sense of belonging and are proud of their affiliation. The synagogue plays a central role in their lives, and they feel a personal responsibility to help it achieve success. They feel comfortable and at home at their synagogue, think that the environment is an excellent fit for them, and would recommend the synagogue to a friend. They consider their dues an investment in the synagogue community.

In 2015, the UJA-Federation publication, *Are Voluntary Dues Right for Your Synagogue? A Practical Guide*, was met with tremendous interest, with over 2,000 unique downloads to date and extensive media coverage both at the time of publication and for many months following. More importantly, a survey following the publication of the first study found that synagogue leaders from around the country utilized the report to catalyze key conversations about their synagogue's membership model. Today, this new volume continues the work of our first report and examines the financial and cultural information from almost every congregation in the United States that has adopted the voluntary commitment model (as of July 2016).

The impetus for this follow-up report comes from the many inquiries received over the last two years following the release of the 2015 study, with one of the most frequently asked questions concerning sustainability. At the time of the 2015 publication, there wasn't enough data to address the question of longer-term viability of the model. Now that more synagogues in the data pool have used the model for an extended period of time, we are able to revisit this question.

As you read through this report, please understand that we do not have a stance on whether or not synagogues should adopt, endorse, or recommend this or any other model. Rather, this report attempts to present useful data for congregational leaders contemplating a change. A synagogue's conversation around reviewing financial models and the surrounding culture and processes is in itself worthwhile. Engaging your members about the meaning and value of belonging can only benefit your community and renew the life of your synagogue.

As always, we welcome your thoughts and reflections. In particular, we want to hear how you utilize this report in your synagogues. Write us at [synergy@ujafedny.org](mailto:synergy@ujafedny.org).

**Bruce Wexler**

Chair

SYNERGY, UJA-Federation of New York

**Adina H. Frydman**

Executive Director

SYNERGY, UJA-Federation of New York

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# Introduction

The first volume of this report, *Are Voluntary Dues Right for Your Synagogue? A Practical Guide*, was published by UJA-Federation of New York with information about 26 synagogues nationwide that had eliminated dues and moved to a voluntary commitment system.<sup>1</sup> As of summer 2016, we were aware of 57 synagogues that have eliminated dues, an increase of nearly 120%. Another group of synagogues plans to move to the voluntary commitment system this coming year, which will raise the total number of synagogues to well above 60. The voluntary commitment system thus represents a significant change of financial models in the current landscape of American synagogues.

The 2015 report marked an important moment in the brief history of voluntary commitment synagogues. Synagogues contemplating changing their financial models now had a resource to reflect on and to read. But just as the report was published, UJA-Federation's SYNERGY department received numerous inquiries asking for more information on how the model was sustained over time. These inquiries formed the basis and rationale for this follow-up report.

This volume continues the work of the first report and examines the financial and cultural information from almost every congregation in the United States that has adopted the voluntary commitment model as of July 2016. Using this large pool of data, we have written this report with two goals in mind. First, we hope to confirm the findings of the prior report and discover additional findings that could help synagogues considering adopting the voluntary commitment model. Second, we want to answer questions related to the sustainability of the model. For example, what has happened to those synagogues that have used this funding model for three years or more? Has the model made them financially sustainable? Has it successfully embedded itself into the culture of these congregations? What ongoing choices and tasks must the synagogue manage to sustain the voluntary commitment model?

Rather than recommend whether synagogues should adopt, endorse, or recommend this or any other model, this study attempts to present useful data for congregational leaders contemplating a change. A synagogue's conversation around reviewing financial models and the surrounding culture and processes is in itself a worthy project. Regardless of the conversation's

outcome, engaging its members about the meaning and value of membership can only benefit and renew the life of a synagogue.

While many synagogue members assume that the dues system was handed down at Mount Sinai, most synagogues began charging dues as their primary mode of revenue only 100 years ago. Some synagogues employed a "fair share" system in which dues were tied to an individual's personal income, while most used a category system with dues based on age and family status. Under either system, paying a set amount of money was the primary way to become a congregation member.

The dues system worked remarkably well for synagogues throughout the 20th century. It sustained countless new congregations and their buildings particularly in the 1950s, when there was explosive growth of suburban synagogues. However, after the global financial crisis that began in 2008, congregations began calling this long-standing model into question. Many expressed concern that they were no longer able to bring in the same revenue with the dues system. The recession had diminished many members' disposable incomes, which hurt congregations.

At the same time as the recession hit, the Jewish community also began experiencing profound disruptions in longtime patterns of synagogue affiliation. For generations, Jews viewed belonging to and supporting synagogues as an obligation. But this sense of obligation has become attenuated in younger generations of Jews as well as with empty nesters.<sup>2</sup> As a result of both the recession and changing cultural patterns, synagogue membership in American

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<sup>1</sup> Throughout this report, we use the term voluntary commitment, which more accurately describes this model that seeks to undo the concept of dues.

Read our first report, *Are Voluntary Dues Right for Your Synagogue? A Practical Guide* [www.ujafedny.org/get-info/for-synagogues/synergy-reports/](http://www.ujafedny.org/get-info/for-synagogues/synergy-reports/)

<sup>2</sup> *Should We Stay or Should We Go? Empty Nesters on the Edge*. [www.ujafedny.org/get-info/for-synagogues/synergy-reports/](http://www.ujafedny.org/get-info/for-synagogues/synergy-reports/)

communities continues to decline.<sup>3</sup> According to Pew Research Center's October 2013 report *A Portrait of Jewish Americans*, only a third of adult American Jews belong to synagogues.

The dues system has been a particular concern for congregations in this time of transition away from synagogue membership. Having a large, obligatory, up-front payment may not make sense when synagogues are trying to lower barriers to entry. The process of asking for a dues abatement can be uncomfortable for a member. Going before a committee or the executive director — no matter how pleasant they may be — can be perceived as at odds with a welcoming spirit. To many, the “pay to pray” models do not reflect Jewish values. Such factors illustrate how the dues system may no longer align with the culture, thus making it harder to raise money, while simultaneously alienating existing and prospective members.

For many synagogues that have moved away from a dues model, the voluntary commitment system is as much about cultural alignment as it is about finances. A significant finding in this report is that even

synagogues that have not improved their membership or finances still call the voluntary commitment system an unqualified success. Why? Because they believe the voluntary commitment system better speaks to their values as a community. As our researchers interviewed these congregations, they noted frequent and repeated comments about how conversations about money with current and prospective members became much less fraught given how the new system promotes engagement and transparency.

The challenge of sustaining this system is real. Even though congregations report satisfaction with the new system, some have also reported a challenge of getting members to increase their pledges over time. This problem is significant, because newer members of a synagogue typically pay lower amounts. When synagogue leaders can no longer rely on increased revenue from a dues rate increase, they must focus on engaging their membership around finances in a more sustained way. Many of the findings that follow reveal where opportunity lies, and we leave you with tangible steps to consider as the field grapples with this next frontier of synagogue sustainability.

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<sup>3</sup> See Pew Research Center's October 2013 “A Portrait of Jewish Americans” at <http://www.pewforum.org/2013/10/01/jewish-american-beliefs-attitudes-culture-survey>

# The Voluntary Commitment Model at a Glance

Our previous report collected data from 21 synagogues that had moved to the voluntary commitment system from another dues model. (Another five synagogues featured in that report were founded with the voluntary commitment model.) These synagogues were diverse geographically. Most were small or midsize with fewer than 550 families.<sup>4</sup> They were primarily Reform, but many were Conservative and a few were independent. The results of that report demonstrated that voluntary commitment synagogues were faring well. Membership at these synagogues grew by 4% annually, and revenue increased at a similar pace. Congregations in the first volume reported almost uniformly positive results.

The report catalogued a number of key features and characteristics of the voluntary commitment model, which make up a brief summary that is a backdrop to this volume:

## **Dues are eliminated and replaced by a “sustaining level.”**

Under a traditional dues system, congregations set a defined fee that people must pay to formally become members. If prospective members are unable to pay that amount, they can often work out a special arrangement with an individual or group from the synagogue, typically an executive director or a dues abatement committee.

Voluntary commitment congregations explicitly leave it to members to decide their own level of commitment, with no arrangements or deals needed. This amount is most often called a “pledge” or a “share,” rather than a “dues payment.” However, congregations do suggest amounts they hope members will consider giving. Typically, this is a “sustaining amount” or “sustaining share.” Most congregations determine a sustaining amount by dividing their net operating costs, less such expected revenue as school fees or endowments, by the number of families in the congregation.

## **Some members inevitably pay more and many pay less, but there is a limited “gaming” of the system.**

Many congregations fear that if there is no oversight of member pledges, congregants will take advantage of the system and pay little or nothing to be a member. In the previous report, not one congregation reported this as an issue, despite initial worries. In most congregations, some portion of the congregation paid less than the sustaining amount and some smaller portion of the congregation paid above it, but all

congregations accepted this situation as a reality of the system. A key challenge identified by the previous study is encouraging members who have the means to give more than the sustaining amount.

## **Financial transparency and sharing information is paramount.**

Many voluntary commitment congregations promote increased financial transparency. Because members can choose their own commitment level, congregations are forced to make the case to their members as to why they should give at the sustaining level or more. The model is marked by leaders’ heightened attention to sharing financial information so that members understand the collective investment required to sustain the synagogue.

## **Members are engaged in a thoughtful change process.**

Most congregations spend anywhere from six months to two years preparing for a dues change. During this time, congregations engage in an array of activities that include creating a dues task force, researching other synagogues using this model, reviewing members’ giving patterns, talking with members in large town hall settings and smaller parlor meetings to determine the appetite for change, and preparing new communication and membership materials to transition from one model to another.

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<sup>4</sup> The paucity of larger synagogues in this report may be a reflection of the few large synagogues that exist nationally or the reticence of larger congregations, which have more complicated financial structures, to change models. We would need to conduct a further study to verify these hypotheses.

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## Meeting with, listening to, and relating to members has become the cornerstone of reimagining synagogues.

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### Synagogue leaders seek to align their financial model with their values.

For synagogues that move to the voluntary commitment model, the values of the system are generally as important as the economic incentives. No congregation enjoys working out dues arrangements with members, because this level of scrutiny can be perceived as antithetical to the ideals of a community that respects its members. Further, congregations that adopt this system almost uniformly report that conversations about membership become significantly easier. Too often, membership conversations devolved into what a prospective member could afford to pay, as opposed to the “fit” and meaning of joining a synagogue community. The voluntary commitment system aligns the values of the congregation with the financial model.

### Relationships matter.

Dr. Ron Wolfson’s book, *Relational Judaism: Using the Power of Relationships to Transform the Jewish Community* (Jewish Lights, 2013), captured significant attention in the synagogue world because it articulated an essential truth about congregations: Synagogues spend a lot of time creating programs and services but not engaging members in relationships.

In the past few years, because the system no longer obligates members to pay dues, the congregations have greater financial incentive to engage the membership so that members value the synagogue appropriately. For their part, members understand that the system no longer relies on the transaction of paying dues. Because they are at liberty to give as they see fit, members are empowered to be partners in building and sustaining their Jewish lives by being part of the synagogue community.



# Executive Summary

This report returns to 19 of the 26 synagogues featured in UJA-Federation of New York's 2015 publication *Are Voluntary Dues Right for Your Synagogue? A Practical Guide* and identifies another 30 synagogues that eliminated dues in favor of the voluntary commitment model through summer 2016.

Like its predecessor, this report analyzes the financial and membership details of congregations that our researchers obtained through interviews and written submissions. The goals of the report are to further assess the success of the system in general, explore the model's longer-term sustainability, and provide a readiness-assessment tool for synagogues contemplating a change in financial models.

As in the first report, this volume does not recommend whether synagogues should adopt this model. Rather, we present useful data for congregational leaders who are contemplating a change. We believe that the conversation within synagogues to review their financial models and the surrounding culture and processes is in itself a worthy project.

Whichever model a congregation chooses, engaging members in conversation about the meaning and value of membership can only benefit and renew the life of a synagogue.

## This report's major findings include:

- Congregations are almost uniformly pleased with the change to this new financial model, and no congregation reports an interest in returning to a traditional dues model. Many congregations report that the positive cultural impact of the change is as important as the financial ramifications.
- Congregations report an average 3.6% annual increase in membership.
- Congregations report an average 1.8% annual increase in pledge revenue.
- Congregations using the system for three years or more report positive membership and revenue growth after three years, but they report that the most significant growth typically occurs in the second year after switching models.
- Congregations are concerned that new members are pledging at lower rates than existing members.
- Congregations that have used the model for more than three years report a need to continue promoting and reintroducing the model to the membership. They also cite a need for greater attention to cultivating all members beyond the first year.
- Congregations do not adequately track their financial data. Better tracking and more data could allow them to more effectively sustain a financial change.

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## Engaging members in conversation about the meaning and value of membership can only benefit and renew the life of a synagogue.

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Overall, the findings are quite positive for congregations that have eliminated dues. They report strong membership data — for retaining members as well as attracting newer members. However, congregations are concerned about the lower amounts pledged by new members. Congregations describe the need to be more thoughtful in creating strategies to encourage newer and typically younger members to raise their pledges as they spend time in the congregation. Congregations must also extend those cultivation and engagement strategies to the full membership so that the total average pledges keep pace with required and desired budgetary expenses.

After analyzing the data, we provide in this report suggestions and strategies for optimally maintaining the system and offer new and revised tools for synagogue leaders considering a dues model change, as well as essential questions for sustaining the voluntary model.

**Some of these recommended steps include:**

- Congregations must attend to financial transparency after the initial point of dues transition.
- Congregations should regularly reintroduce the system to members to remind them of the rationale behind the voluntary commitment model and encourage them to pledge generously.
- Congregations need to track member giving trends more systematically.

This report includes three case studies featuring congregations with varying experience using the voluntary commitment system after eliminating dues. The three congregations are geographically and denominationally diverse. Two of the case studies describe synagogues that have seen high success

over the first three years using the system. The last case study focuses on a congregation that has used the system for eight years and details their efforts to renew and sustain the system.

Finally, this report analyzes broader themes raised by the synagogues that are using a voluntary commitment system. Synagogues are grappling with communication, transparency, engagement, barriers to entry, and effective fundraising. These issues present themselves at the same time that synagogues are dealing with a changing Jewish landscape. This report draws out the importance of these themes in understanding why the voluntary commitment system receives such positive reviews and continues to attract more interest in congregations looking to change their current models.

# Methodology

Most of the data for this report came from interviews with synagogue leaders over the summer and fall in 2016. In most cases, our researchers conducted interviews with the executive director or administrator of the congregation. For synagogues without a strong administrative position, we interviewed a lay leader with knowledge of the congregation's finances and culture, such as the president or treasurer. In a few smaller synagogues, rabbis were our primary interviewees. To gather details on financial trends, we collected quantitative data from synagogue leaders by email after the initial interview.

The table on page 10 provides a list of U.S. congregations that we have identified as voluntary commitment synagogues as of July 2016. For the purposes of this report, a voluntary commitment congregation satisfies the following three criteria:

- Members decide how much money to give to the congregation without oversight from synagogue leaders. There is no “deal” to work out with a lay committee or staff administrator.
- The congregation is explicit and public that they are using a voluntary pledge/commitment system.
- At a minimum, the synagogue is 100 family units with a building or full-time rabbi.<sup>5</sup>

The list of congregations includes seven synagogues that have used this model since their inception. We did not interview these congregations because this report is intended for congregations thinking about switching from a traditional dues model to the voluntary system. We understand that the founding cultures of these seven synagogues are often fundamentally different from the synagogues featured in this report because they do not have a historical experience of dues as their default system. We did not include them in this report.

The list also includes seven congregations that switched to the voluntary commitment model in summer 2016. We gathered preliminary information from this group with a survey, but we did not include them in our statistics because these congregations do not yet have complete sets of data to share. The section on page TK is devoted to our preliminary findings from this group.

Please note that most congregations do not track their own trends and statistics thoroughly. They often do not have the personnel or technology to do this work or lack continuity amid changing leadership to accurately track data over time. We point this out to say that not every congregation was able to answer every one of our questions. It would be excessive to report on exactly how many data points we gathered for any given statistic; however, we do note when we have a particularly limited pool of respondents.

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<sup>5</sup> Congregations that are not this size may have significantly different financial needs and require less revenue.

# Voluntary Commitment Synagogues Through

Congregations Featured in First Study	City, State	Denomination	Membership Size	Date VCM Began
Central Reform Congregation*	St. Louis, MO	Reform	800	1984
Congregation Shir Shalom*	Woodstock, VT	Reform	N/A	1988
Congregation Sukkat Shalom*	Wilmette, IL	Reform	331	1995
The New Shul*	Scottsdale, AZ	Independent	150	2002
Congregation Shma Koleinu*	Houston, TX	Independent	N/A	2014
Valley Temple	Cincinnati, OH	Reform	260	1999^
Oak Park Temple B'nai Abraham Zion	Oak Grove, IL	Reform	540	2004
Temple Israel of Sharon	Sharon, MA	Conservative	630	2009
Congregation Shaare Emeth	St. Louis, MO	Reform	1700	2009
Temple Brith Achim	King of Prussia, PA	Reform	250	2010
Temple Beth El	Aptos, CA	Reform	528	2010
Temple Ahavat Achim	Gloucester, MA	Conservative	181	2011
Temple Beth-El	Jersey City, NJ	Reform	150	2012
Beth Israel Congregation	Jackson, MS	Reform	215	2012
Temple Beit HaYam	Stuart, FL	Reform	281	2012
Temple Kol Ami	W. Bloomfield Hills, MI	Reform	300	2012
Temple Beth Tzedek	Amherst, NY	Conservative	500	2012
Beth Chaim Congregation	Danville, CA	Independent	271	2013
Temple Beth Am	Jupiter, FL	Reform	520	2013
Temple Emanu-El	Providence, RI	Conservative	789	2013
Congregation Bet Shalom	Tucson, AZ	Conservative	150	2014
Congregation Or Atid	Wayland, MA	Conservative	150	2014
Temple Emanu-El	Marblehead, MA	Reform	506	2014
Touro Synagogue	New Orleans, LA	Reform	525	2014
Temple B'nai Or	Morristown, NJ	Reform	465	2014

\*These congregations were founded with a voluntary dues model and were not included in this study.

^Valley Temple's VCM start date was incorrectly listed in the prior study.

~Due to their size, these congregations were not included in this study, as the researchers required a minimum of 100 member households.

Synagogues listed in brighter blue were sought for interviews; households listed in darker blue were surveyed.

Newly-Identified Adopters of VCM	City, State	Denomination	Membership Size	Date VCM Began
Congregation Ahavas Israel	Grand Rapids, MI	Conservative	110	2010
Ohavi Zedek Synagogue	Burlington, VT	Conservative	320	2011
Congregation Beth Israel Ner Tamid	Glendale, WI	Conservative	375	2012
Congregation Beth Shalom	Santa Clarita, CA	Conservative	218	2013
Mishkan Shalom	Philadelphia, PA	Reconstructionist	210	2013
Congregation Beth Tikvah	Worthington, OH	Reform	477	2014
Congregation Emanu-El B'ne Jeshurun	River Hills, WI	Reform	495	2014
Nanuet Hebrew Center	New City, NY	Conservative	300	2014
Temple Beth-El	Providence, RI	Reform	760	2014
Tifereth Israel Synagogue	San Diego, CA	Conservative	350	2014
Congregation Beth David	Saratoga, CA	Conservative	504	2015
Congregation Or Atid	Richmond, VA	Conservative	160	2015
Congregation Shomrei Emunah	Montclair, NJ	Conservative	187	2015
Congregation Sinai	Fox Point, WI	Reform	340	2015
Congregation Torat El	Oakhurst, NJ	Conservative	465	2015
Flemington Jewish Community Center	Flemington, NJ	Conservative (unaffiliated)	175	2015
Suburban Temple - Kol Ami	Beachwood, OH	Reform	363	2015
Temple Beth Abraham	Tarrytown, NY	Reform	387	2015
Temple Israel	Columbus, OH	Reform	500+	2015
Temple Beth El	San Antonio, TX	Reform	986	2015
Peninsula Sinai Congregation	Foster City, CA	Conservative	285	2016
Congregation Beth El	La Jolla, CA	Conservative	580	2016
Temple Solel	Bowie, MD	Reform	185	2016
Scarsdale Synagogue Temples Tremont & Emanu-El	Scarsdale, NY	Reform	335	2016
Temple Beth Orr	Coral Springs, FL	Reform	350	2016
Temple Beth El	Lancaster, PA	Conservative	177	2016
Congregation Beth Emek	Pleasanton, CA	Reform	230	2016
Temple Emanu-El~	Rochester, NY	Reform	89	2015
Beth Hillel Temple~	Kenosha, WI	Reform	82	2015
Congregation T'chayah~	Oak Park, MI	Reconstructionist	50	2016
Congregation Mekor Shalom*	Tampa, FL	Conservative	N/A	2013
Makom NY*	Woodbury, NY	Independent	N/A	2015

2016 all congregants;  
2015 for new members only

# What We've Learned

The following data represent our major findings from 37 interviews, followed by a comparison of findings from the newly identified group of model adopters with those featured in the 2015 report. Finally, the preliminary information on 2016 adopters of the voluntary commitment model is included here.

## 1. KEY FINDINGS

**Congregations are overwhelmingly positive about the impact of the voluntary commitment model on congregational culture.**

We asked each congregation to rate its level of satisfaction with the voluntary model from least satisfied (1) to very satisfied (5). The results reflect the predominantly positive message heard throughout these interviews: The average satisfaction rating was 4.1.

The vast majority of congregations rated the system a 4. Even those congregations that gave the system a 3 generally couched their critiques in positive comments. One congregational president chose a 3 because “the system worked great for those of us who were members, but we did not attract as many new members as we were hoping.” We also asked the congregations whether they had talked about reverting back to the old dues system; however, not one congregation expressed an interest in reverting to its prior dues model or moving to another system.

When commenting on why they are so positively disposed to the voluntary commitment model, a few congregations cited its effects on membership and revenue, but they most often cited its impact on congregational culture and values. A synagogue that changed its model in 2014, raising membership by 6% and revenue by 3%, noted that the most important result ultimately was not financial:

“The biggest positive impact has been cultural. There has been a spirit around “open doors” [the name of its model] which people have gravitated to. I don’t apologize for telling people how much per family it costs, but I thank everyone no matter what they give. I had two families walk into my office to say they were quitting because the primary wage earners lost their

jobs. After I said I was sorry they lost their jobs and we got back to the membership conversation, I could say to both of them, “Just give me \$18.” Both families were relieved and appreciative. To be able to have that conversation was worth a lot.”

The president of a congregation that has used the voluntary system for five years and has seen their finances and membership remain stable also said that the congregation’s interest in the system was more about culture than finances:

“One of the reasons we went to this system is that we didn’t want to have people feel like there is a dollar sign hanging over their head when they want to join the synagogue. We tell them that this is what it costs to run the place, but you are going to decide ultimately. Use your heart and head. We are all adults. You will tell us what you want to do. And when we say that to new members, it’s like a wall comes down, and people understand we are interested in them as individuals and not as potential money.”

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## Not one congregation expressed an interest in reverting to its prior dues model.

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**The average increase in annual membership is 3.6%.**

The average annual net membership increase for synagogues that changed to the voluntary model is 3.6%.<sup>6</sup> More than two-thirds of the congregations (70%) saw some growth; 10% remained flat, while 20% have lost members since implementing the voluntary commitment system. This data confirms the 2015 report’s findings that saw a 4% annualized growth in membership. In this report, we find that increased membership occurs in congregations of all sizes.

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<sup>6</sup> We use a historically weighted calculation to get to this number. For instance, if Congregation X moved to this system five years ago and has seen a membership increase of 25% since that time and Congregation Z moved to this system last year and has seen a 10% increase, the calculation would be Congregation X [5+5+5+5+5] + Congregation Z [10] = 35, divided by 6 years, resulting in an average annual growth rate of 5.83%.

Congregations with fewer than 250 family units grew at a 2.7% rate, midsize congregations grew at a 3.5% rate, and the larger congregations — those with more than 500 families — grew at a rate of 4.8%.

Congregations that have used the voluntary commitment system for three years or more report an average historical membership growth rate of 3.9%. However, average membership gains are higher in the first two years and slower in subsequent years. The first year after the change averaged 4.3% growth, the second year averaged a robust 7.6%, and the third year averaged 3.9%. While there are not enough congregations with four years of voluntary commitments to report meaningful findings, evidence suggests a similar annual growth of 3% to 4% after the third year.<sup>7</sup>

The voluntary commitment model continues to bring in new members even after the first few years, but the second year typically ushers in the most dramatic growth. We suspect the reason for this phenomenon is because the first year of the model is when the synagogue places the most attention on existing members, ensuring a solid transition from a dues-based reality to the new financial system. By the second year, congregations are looking outward, leveraging any buzz or publicity generated from switching to the new model and resolving any “kinks” in the system that might have arisen in the first year. They may also be enjoying higher member retention in the second year while adding new members to their roster.

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## The second year typically ushers in the most dramatic growth.

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The 20% of synagogues that lost members had an annual membership loss of 2.1%. It is difficult for us to draw conclusions from this group. They are primarily recent adopters of the model, and some were disappointed that they hadn’t attracted new members in the way they had hoped. Others were more positive. When asked how they felt about their membership loss, one synagogue president said, “We are absolutely not disappointed in the system because we can only

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## If we don’t trust our members, they cannot trust us.

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imagine what those numbers would look like if we hadn’t switched.” The congregation had moved to this system in part to forestall membership loss that they experienced under the traditional dues system.

These generally positive membership numbers suggest that the voluntary commitment model works to create an open and welcoming environment for new members. We heard repeatedly that the removal of dues lowers the barrier to entry and allows congregations to focus conversations with potential new members exclusively on the meaning of joining the synagogue — and not on how much it will cost.

An executive director at a community synagogue that has been using this system for three years, noted:

“Conversations with potential members around joining are much easier. I just wrote an email to a prospective member saying she didn’t need to explain her circumstances — there is no negative here, we are happy to have them, and their pledge is appreciated. The pledge system creates an atmosphere of positivity and empowering people. If we don’t trust our members, they cannot trust us. Now when I have a conversation around membership... it is a delight. It’s a genuine conversation, not a conversation about ‘fee for service.’”

The membership increase is not entirely due to attracting new members. Some synagogues report that the voluntary commitment system is more effective in member retention. The president of Congregation Beth Shalom in Santa Clarita, California, which is featured in the case report on page 29, said:

“The enduring part of this is the pledge structure: People might come initially for the building and the rabbi, but the finances in the long term make it possible for people to stay.”

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<sup>7</sup> Because we obtained limited financial information from synagogues with more than 500 households, we derived this number from a small sample size.

Another trend we observe as it relates to membership involves empty nesters. Many synagogues report seeing their empty nesters discontinue their membership. While many factors contribute to their leaving,<sup>8</sup> a contributing factor is the cost. When members understand that they can modify their commitment to the synagogue based on their stage of life, they are more likely to stay. Voluntary commitment synagogues are arguably better equipped than others to respond to these challenges.

#### **The average annual increase in pledge revenue is 1.8%.**

Congregations that switched to the voluntary commitment system report an average 1.8% annual increase in pledge revenue. Altogether, 58% of congregations reported an increase in pledge revenue since changing models, 21% were flat, and 21% reported a decrease. Congregations that have used the model at least three years reported an average 2.2% annual pledge revenue increase, which is slightly higher than the general findings. These numbers reflect a variance from the previous report, which reported slightly higher annual pledge revenues.

As with membership, the findings here are primarily positive. For those congregations whose revenues have dropped, the average decrease in revenue is 2.6%. However, as with the discussion on membership, some of these synagogues report that their revenue decrease could have potentially been worse if they had maintained their prior dues system.

Congregations report that increases in revenue come from various sources:

- An increase in membership.
- Raising the sustaining rate marginally each year.
- Encouraging members to pledge above what they pledged in previous years.
- A general culture of voluntary commitment and an atmosphere of good will that translates into continued pledge increases.
- The move to the voluntary system in tandem with more concentrated development efforts that have increased pledge revenue.

Even with this generally positive trend, many congregations are concerned that new members join the congregation largely below the sustaining level. This helps to explain the discrepancy between the more robust growth in membership and revenue growth. The next section further elucidates this finding.

For congregations that have longer experience with the model, another explanation for the gap between membership and revenue growth is what the leadership of Temple Israel of Sharon in Massachusetts calls “complacency.” Members typically settle into the donation amount they give each year and do not raise their pledges. Temple Israel leaders said:

“It has been seven years since we changed to the system, and so some folks have forgotten why we changed in the first place, and some folks were not even members then, so we have failed to keep the momentum going.”

Without the prod of a mandatory dues increase, it may be difficult to achieve target increases in member giving.

#### **New members are joining below the sustaining rate.**

Congregations generally report that new members are joining below the sustaining rate, sometimes pledging dramatically lower amounts than existing members. By and large, we heard that families with the financial burden of religious school or day school tuition, as well as seniors on fixed incomes, make up the bulk of new members, which could explain the lower pledges.

One synagogue reported that most of its new members pay a “suggested minimum” amount that is set at about \$800 below the sustaining rate and parallels its former fixed dues amount. Another synagogue calculated that on average, new members pay 80% of what their longer-term members pay. Yet another congregation reported that of their net 50 new member families, representing a 10% growth in the congregation, only five of those families pay at the sustaining level of \$2,300, and not one new family pays above the sustaining amount. A representative of this synagogue said, “Our revenue is staying basically flat — not because members’ pledges have gone down, but new members are not pledging as high.”

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<sup>8</sup> *Should We Stay or Should We Go? Empty Nesters on the Edge.* [www.ujafedny.org/get-info/for-synagogues/synergy-reports/](http://www.ujafedny.org/get-info/for-synagogues/synergy-reports/)



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## Veteran members are financially “floating” the congregation.

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We heard of many cases in which no new members were pledging at the sustaining amount. Despite this, congregations understand that many of these new members would not have joined under the old dues system, and even the minimal revenue they are bringing in is helpful to the congregation. These new members bring in revenue and increase the vitality of the congregation.

New members can create added costs for a congregation, like the need for more physical space or another professional staff person, yet this does not seem to be a major concern of the synagogues we studied. We observed that most congregations with this type of growth are generally able to add plenty of new member households before there are notable added expenses.

Synagogues report the biggest strain on school enrollment. One California synagogue’s preschool grew from 20 to 100 children in the two years following its dues change; the synagogue attributes its success to new preschool leadership rather than the dues model, although the model helped. Another congregation reported great pressure on its religious school staff when enrollment exceeded expectations. A few synagogues are thinking about their membership tipping points at which they may need to add an assistant rabbi or more staff, but membership gains are typically modest enough from year to year that these discussions are more the exception than the rule.

With many newer and often younger members not pulling their financial weight, veteran members are financially “floating” the congregation. This is a real concern, because congregations traditionally see themselves as a community where people should pay relatively similar amounts, with exceptions made for those who do not have the means to pay. Part of the culture of the voluntary commitment system is to encourage people to give what they can, which inevitably leads to some inequality in how much people

are contributing. Congregations using this system effectively accept this premise and must work on maximally creating a culture of giving.

Not every congregation reports low pledges from new members. Temple Beth El in Aptos, California, which has been using this model for six years, sees its new members joining at pledge levels that are similar to those paid by the rest of the congregation. They attribute this parity to the significant time the congregation’s clergy and executive director spends with new members to make them not only feel known and welcomed by the congregation, but also aware of the fiscal model, encouraging generosity. Nonetheless, the majority of congregations report that new members join at lower pledge levels, and it stands as perhaps the most challenging reality of the voluntary commitment system.

### **60% of congregations reported seeing an increase in member engagement after moving to voluntary commitments.**

Congregations were asked to evaluate the level of their membership’s engagement with the synagogue both before and after the switch to voluntary dues. We did not identify engagement using such indicators as attendance at services or educational programs; rather, we kept the question broad to get an overall sense of the congregational experience. Ratings ranged from least engaged (1) to most engaged (5). Before the dues change, most of our interviewees rated their membership as moderately engaged, with a 2.8 average across all congregations. This confirms the findings from the first volume of this report, that the voluntary commitment system is not only for congregations that already have a highly engaged membership.

The new finding in this report is the large number of synagogues reporting that membership engagement increased after moving to the voluntary commitment system.

Congregations report different explanations to explain this finding:

- The switch to the new model triggered the congregation to become more actively focused on engagement.

- The influx of new members, many with children, led to more vibrant and diverse programming or higher school enrollment.
- New board leaders and revived committees create more engagement.
- Unrelated factors, such as new educators joining the staff, contributed to the switch of financial models.

Although the congregations did not agree on a reason for increased engagement levels, we can broadly state that most congregations are thinking about engagement and practicing new strategies when they move to this system. They believe that by allowing congregants to decide their own commitment level, they are empowering congregants. And leaders are pushing themselves to more deeply engage the membership through conversation and sharing information.

**An average 38% of congregants give at or above the sustaining level.**

To meet their budgets, congregations need to have a reasonable percentage of members giving at the sustaining rate. Across all of the congregations we interviewed, the average percentage of members giving at the sustaining level was 22.5%.

On average, congregations saw 15.8% of their members give above the sustaining level, with the range spanning from 4% to 34%. Only two congregations reported the percentage as low as 4% and 5%. Taken together with the 22.5% of members giving at the sustaining level, this means that on average, 38.3% of members are giving at or above the sustaining amount.

Congregations contemplating a change to voluntary commitments should seriously consider whether they will have close to 40% of their congregation paying at or above the sustaining level. (See page 22 for a discussion on how most congregations derive their sustaining amount.)

**Most congregations continue to conduct fundraisers outside of the pledge system.**

A large majority of the congregations we studied continue to hold fundraisers, rather than migrate all of their development efforts to an annual voluntary pledge. Many have experimented with fundraising strategies, like changing their High Holiday ticket policies or the

way they ask for their annual appeal, but the main events and appeals remain in place.

A few congregations have brought the tactics and values of voluntary commitments into their major fundraising events. Beth Chaim Congregation in Danville, California, changed how they price their annual gala. They previously charged a high price for tickets to the gala, but now they set a sustaining amount for their gala along with several levels of giving and an option to pay very little. While the event does not bring in more money compared with previous years, the congregation reports that attendance has increased — especially among younger members — and the spirit in the room is more positive through these individuals' participation. By consciously choosing to open these events to everyone, these synagogues are making progress toward building a culture of inclusion.

Many synagogue leaders reported that their approach to fundraising beyond the voluntary system is not robust enough. They would like their congregations to organize more consistent, year-round fundraising efforts, just as the broader nonprofit arena does. But those synagogues that conduct various appeals throughout the year often find that their congregants experience “donor fatigue.” Two of the synagogues in our study eliminated additional fundraising appeals to avoid donor fatigue.

Congregations are trying to balance donor fatigue with the idea of a “second wind” — the concept that some people are more comfortable spreading out their giving over the course of the year. One executive director summed up the tension this way:

“One of the biggest struggles we have is communicating with people to distinguish between the annual appeal and the voluntary pledge. This year, we are using language that says the annual appeal is an extension of the pledge. Because it is all just one pot of money, we wanted to make this clear to people. We want to make [fewer] asks because we think this will ultimately be better for the congregation. But we have a few members who give considerably to the annual campaign and who have maintained this giving even after we moved to the voluntary system. So even though we ideally would not have an annual appeal, realistically we need it because people get a second wind and have been accustomed for a long time to giving to a special appeal.”

## **Endowments are not necessary for voluntary commitment success.**

Some synagogue professionals have asked whether voluntary commitment synagogues are supported by large endowments behind the scenes. Our research reveals that most of these congregations do not have endowments. Those that do — about a quarter of the synagogues we interviewed — are of various sizes and receive widely varying amounts of interest income from their endowments, covering from 1% to 25% of their operating budgets, with an average of 9% received.

Endowments are most often seen in larger, older congregations, and the relative lack of endowments could be tied to the fact that the vast majority of synagogues using the voluntary commitment model comprise fewer than 500 families. The report indicates that the presence of an endowment is not necessary to successfully sustain the voluntary commitment model.

## **Voluntary commitment synagogues are running successful capital and endowment campaigns.**

A question we repeatedly received after the first report was whether congregations using this system could successfully hold capital or endowment campaigns. As noted previously in this report, many of the congregations are smaller and typically do not think about endowment campaigns, but 11 congregations reported major capital or endowment campaigns while using the voluntary system. Three congregations even started capital campaigns in the same year that they transitioned to the voluntary commitment system, and one was mid-campaign at the time of the change. Though many of these efforts are currently ongoing, most congregations are reporting success thus far in reaching their targets. None has reported failure at this stage.

Each of the campaigns reflect different needs and cultures in the synagogue, from major renovations and mortgage payments to general, rabbinic, and school endowments. But the evidence suggests that voluntary commitment synagogues can successfully run capital campaigns. The treasurer of a synagogue that completed a \$3 million capital campaign credited the voluntary commitment system: “The better culture around money, and speaking about money, allowed the campaign to be a success.”

Another important byproduct of capital campaigns, especially for those synagogues that have used voluntary commitments for a longer time, is the opportunity to once again meet face-to-face with members about the synagogue’s real financial needs. One synagogue president in the middle of raising nearly \$10 million for both capital improvements and an endowment shared this story:

“By sitting down and talking with people and sharing the synagogue story, people are very willing to participate. People who gave very generous donations for the capital campaign — we’ve asked for annual giving increases from them at the same time, and they increase! They didn’t realize or think about the importance of giving more annually... It’s a very labor-intensive process... The capital campaign is showing us that we can do more to increase people’s [voluntary] gifts.”

In effect, capital and endowment campaigns are about educating members to better understand the synagogue’s finances. The financial and interpersonal benefits of these intensive solicitations reveal an opportunity for instituting annual pledge cultivation practices that advance financial transparency within the membership.

## 2. UPDATES TO WHAT WE LEARNED IN THE PREVIOUS REPORT

Since we published *Are Voluntary Dues Right for Your Synagogue? A Practical Guide* in 2015, we have identified 30 new synagogues (as of summer 2016) that eliminated dues and moved to the voluntary commitment system. Some made the shift following the publication of the first report, while others were not known at the time of its publication. Three of those synagogues were not included in this research due to membership sizes of under 100 households. Seven have less than a year of experience with their new dues system; we surveyed them separately and detail our findings in the section entitled “Preliminary Results from 2016 Adopters”. All but two of the 20 synagogues remaining agreed to be interviewed for this report, for a total of 18 interviews.

### Six Commonalities

We sought to corroborate the key findings in UJA-Federation of New York’s first report, *Are Voluntary Dues Right for Your Synagogue? A Practical Guide*. In brief, that report revealed six commonalities among the original group of synagogues interviewed. In the figure below, we compare and contrast each set of synagogues based on those commonalities.

We found notable differences between this group of synagogues and those that we previously studied in the categories of denomination, rabbinic tenure, and finances.

Category	Commonalities Between First and Second Report	Previously Studied Synagogues	Newly Identified Synagogues
Geography	Synagogues in or around large cities.	88%	89% (24)*
Size	Membership of fewer than 550 households.	81%	89% (24)*
Denomination	Reform-affiliated synagogues.	62%	52% Conservative (14) 44% Reform (12) 4% Reconstructionist (1) 0% Orthodox*
Rabbinic Tenure	Same senior or solo rabbi for at least five years prior to dues change.	81%	67% (12)
Lay Leadership	Strong lay leaders with proven business and financial acumen leading the change process.	Most congregations reported lay leadership with strong financial acumen and trust of the congregation.	Data confirms previous finding: Most newly identified congregations report lay leadership with financial backgrounds that trust the congregation.
Finances	Fiscally stable at the time of the dues change.	100%	61% (11)

\*Total number of synagogues are in parenthesis. We calculated demographic figures using all 27 synagogues that met our membership threshold, including 2016 adopters of the voluntary commitment model.

**Denomination.** Whereas Reform congregations previously made up the majority of voluntary commitment synagogues, the new set includes more Conservative congregations than Reform. Voluntary dues are also now emerging in Reconstructionist congregations. This expansion across denominational lines is attributed to greater national awareness about the voluntary model and to resources within the movements and from local federations that either shared information about the voluntary commitment model or actively encouraged synagogues to change their dues models at all. As before, we did not identify any Orthodox congregations that are using the voluntary commitment model.

**Rabbinic tenure.** A successful change to the voluntary commitment model may not require long-term clergy tenure. In the previous report, nearly all of the synagogues had employed their senior or solo rabbis for at least five years prior to the transition. This is not true of the new set of synagogues, which exhibited a more diverse array of rabbinic tenure.

Two small congregations welcomed new rabbis at the same time as their dues model change. Another three congregations elevated their assistant rabbis or High Holiday rabbis to senior positions at the same time or in the year just prior to their dues change. While the majority of synagogues continue to follow the leadership trend identified in the first report, these synagogues with examples of nearly simultaneous financial and leadership change report they either held steady on revenue and membership or grew modestly in one or both of those areas.

These cases illustrate that some congregations are able to navigate through multiple transitions. Because so many elements are at play in a rabbinic transition, however, we can draw no further conclusions between these clergy transitions and the successes or challenges of their voluntary dues models.

**Finances.** Among the new crop of adopters, financial stability was not a prerequisite. Seven of the synagogues we interviewed (representing 39% of the interviewed synagogues) indicated that they were on the brink of financial insolvency or had experienced a decline for years that had worn down the congregation's

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## Dues are not, however, the sole driver of a congregation's financial health, so synagogue leaders must attend to the overall health of the institution while making adjustments to the dues model.

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financial health. All of those synagogues cited their financial struggles as a primary reason for turning to a new dues model. Moreover, six of the seven congregations that were struggling prior to their dues change reported high levels of success with voluntary commitments. The seventh was "cautiously optimistic" but felt that it was too early to tell. Four of these congregations report that their financial stability has improved in the years following the change, while three indicate that they are in a similar financial position as before. No congregation reported a decline in their financial stability as a result of the dues model change.

This is a significant departure from the previous report's findings, suggesting that it may be possible for synagogues in more challenging financial circumstances to benefit from — or, at a minimum, hold steady financially when — changing to the voluntary commitment model. Dues are not, however, the sole driver of a congregation's financial health, so synagogue leaders must attend to the overall health of the institution while making adjustments to the dues model.

As a final note, two of the synagogues surmised that although their financial positions have not changed with this new model, their congregations would not have survived without the dues change. By changing their dues model, these leaders believe that congregants renewed their commitment to the synagogue and that newly joining members are counterbalancing consistent year-to-year membership and revenue losses, at least in the near term. Changing demographics in their respective geographies will ultimately influence whether these congregations remain financially viable over a longer time, regardless of their dues models.

## Reasons for Making a Dues Change

UJA-Federation of New York's *Are Voluntary Dues Right for Your Synagogue? A Practical Guide* cited three primary reasons that synagogues make a dues change: finances, values, and engagement. With this new study, we sought to verify each of these three drivers among the new set of adopters. The findings suggest that the financial reasons discussed previously and value-driven reasons continue to be critical.

The values mentioned as critical to the voluntary model included:

- **Openness** and inclusion of all people, regardless of their giving capacity.
- **Dignity** of members, specifically by rejecting the dues abatement process.
- **Transparency** among congregants of the congregation's financial needs.
- **Self-determination** in naming financial commitments, in contrast to the transactional experience of paying predetermined membership dues.

Synagogue leaders understand that these values more closely align with Jewish teachings and broader societal values that characterize successful 21st-century organizations. By aligning congregational operations with these values, synagogues can deepen the relationships and trust among its leaders and community members.

Beyond finances and values, engagement is a continuing theme among voluntary commitment synagogues, though it was cited less often in this second study as a reason for a dues change. To be sure, engagement is a healthy feature and outcome in a synagogue that has conducted congregation-wide dues change conversations. Two-thirds of the newer adopters reported that increased member engagement was a byproduct of their dues transition, even if it wasn't the primary driver for the change.

Related to the topics of engagement and participation, the previous report identified two synagogues that had created a volunteer pledge in conjunction with the financial pledge: Temple Brith Achim in King of Prussia, Pennsylvania, and Temple B'nai Or in Morristown, New

Jersey. (See the case study on page 33). These are pledges of time and action, separate from the monetary commitment requested for membership.

None of the newly identified synagogues adopted volunteer pledge systems as a component of their voluntary commitment models. Mishkan Shalom in Philadelphia is one exception that presents a brit (covenant) to all new and renewing members with an expectation that each household will act as a service greeter and host a communal meal once a year. (See Mishkan Shalom's example and Temple B'nai Or's recent volunteer pledge form in the Appendix of Materials.)

## 3. PRELIMINARY RESULTS FROM 2016 ADOPTERS

All seven synagogues that switched to the voluntary system in the summer of 2016 responded to a brief survey about their motivations and preliminary impact. We heard the same reasons that other synagogues cited when switching models: financial needs, values alignment (especially inclusion), and member engagement.

UJA-Federation of New York's *Are Voluntary Dues Right for Your Synagogue? A Practical Guide* noted that some synagogues have a relatively quick change process spanning six to nine months, while others choose to conduct more extensive research and community engagement on a one- to two-year timeline. These newest adopters of the voluntary system all took at least one year and averaged closer to two years. (For more information about the change process itself, see UJA-Federation of New York's *Are Voluntary Dues Right for Your Synagogue? A Practical Guide*.)<sup>9</sup> Six of the seven respondents reported that their pledge revenue is on par with or exceeds last year's dues revenue. Leaving out one exceptional case of growth, this small set of synagogues saw an average first-year membership growth rate of 4.8%, even with preliminary figures, ranging from no net growth up to 14%. None saw a membership decline. The only synagogue without a net growth experienced a simultaneous senior rabbi transition, which may account for more attrition than usual. Two reported that former members are returning, possibly due to the new dues model.

<sup>9</sup> Please visit [www.ujafedny.org/get-info/for-synagogues/synergy-reports/](http://www.ujafedny.org/get-info/for-synagogues/synergy-reports/) for all SYNERGY related reports noted throughout this report.

The exceptional case involves a small congregation that saw a 55% membership growth over a two-year period of phase-in — the most astounding figure noted across the entire report. The synagogue president reports that these new members are primarily from an older demographic, paying well under the sustaining amount, but the congregation has raised more money from membership pledges this year than in the past three years. Even with this growth, the impact on synagogue operations is surprisingly minimal. Engagement has improved, with many new members volunteering at services and events, reducing some of the operational challenges that might have surfaced from a membership increase of this size.

One congregation eliminated separate High Holiday ticketing and religious school fees as part of its dues transition, instead folding it into their sustaining

amount. We did not see this change in any other congregation that moved to the model. However, one of the congregations founded with the voluntary commitment model also does not charge separate fees for these expenses. Another synagogue chose to simultaneously change nonmember High Holiday ticketing to a “suggested donation,” leading to a 30% growth in attendance and a 25% growth in revenue. Some reported that with the dues model change, separate collections are up. And they’ve seen increased generosity: More congregants than they expected are giving at or above the sustaining level.

Although these congregations are still too early in their transition for us to make significant claims, it seems that the newest adopters continue the generally positive trends we have seen with other voluntary commitment synagogues.

# Refining the Elements of the Voluntary Commitment Model

Beyond these findings, the report revealed different approaches to various elements of the voluntary commitment system. These subjects may help leaders who are interested in the finer details of adopting, adjusting, and maintaining the model.

## THE SUSTAINING AMOUNT

All but one of the congregations we interviewed annually calculate and communicate a suggested sustaining amount for member pledges. That amount is presented as a per-person or per-household amount and is typically annualized. One congregation suggests only a monthly household figure, though a handful of congregations directly encourage their members to pay in monthly installments throughout the year. Sometimes a pledge per month can be more palatable than a lump sum, and it offers a steadier cash flow. Most per-person figures are half of the sustaining level for couples or families, but two congregations set their singles rates at higher than half of the sustaining level.

We observed two approaches to calculating the sustaining level:

**The basic formula.** The most common approach to determine a sustaining amount among congregations is by dividing their total projected expenses, less expected income from school tuition or an endowment, by the projected number of households or adult members. Most congregations use a conservative household estimate, either budgeting for no membership increase or a very modest increase.

$$\text{Sustaining Amount} = \frac{\text{Total Projected Expenses} - \text{Tuition/Endowment}}{\text{Projected Number of Households}}$$

Synagogue Profile	Average	Range
Overall	\$2,500	\$1,000-3,600
California	\$2,600	\$1,000-3,300
Southern States	\$2,190	\$1,800-2,600
250 Households or Fewer	\$2,150	\$1,000-2,800
250 Households or More	\$2,600	\$1,900-3,600
Small City	\$2,190	\$1,800-2,800
Metropolitan Area	\$2,500	

This chart reflects examples of sustaining amounts for synagogues of various size and geography.

**The compensatory calculation.** Some congregations compensate for households that are known to pay less by removing those households from the basic equation, which bumps the sustaining share higher per remaining household. Compensatory calculations might also add in expenses for items on the congregation’s wish list — from programming to capital costs — that may not be part of the regular operating budget.

Once congregations have calculated a sustaining amount, some make further modifications that take into account the psychological dimensions of setting prices. Most congregations aim to keep their sustaining levels close to what their dues levels were under a traditional structure. This way, congregants do not feel that the sustaining amount is so far afield from previous giving expectations. Other congregations choose not to increase the sustaining amount at the same rate that they increase their overall budget.

Two congregations reported that their projected pledge income would not provide full coverage of their budget due to how they set their sustaining level. To



compensate for the shortfall, one synagogue asked everyone pledging below the sustaining amount to increase their gifts by \$100.

To date, none of the congregations previously interviewed have made any substantial change to the way they calculate their sustaining amount. After the experimental first year of the voluntary commitment model, some leaders make adjustments based on the reality of the income they received, but this has not led to radical revisions of the calculation.

## MINIMUM PLEDGES

The vast majority of voluntary commitment synagogues do not require a minimum pledge. Only two congregations we interviewed require a minimum — one intentionally set at the price of its High Holiday tickets, the other at a few hundred dollars per adult. Others strongly encourage new members of limited means to join for a low amount ranging from \$36 to \$180. A few publicize suggested minimums that range from \$500 to \$1,900. In practice, even among synagogues without a publicized minimum, synagogue administrators often counsel new members as part of an intake process to make a financial gift to the congregation. This approach is in keeping with the general values of the voluntary commitment system that appreciates any gift no matter the level.

## THE MEMBERSHIP RENEWAL PROCESS

Across all congregations in this report, we noted diverse practices for membership pledge renewal that we grouped into three categories:

**The open renewal system.** With this system, the congregation asks households to renew their membership by naming their pledge amount each year. Congregations clearly state their sustaining amount, and sometimes a suggested minimum or levels of higher giving, but they do not customize a suggestion for each household's commitment. We could view this as the riskiest renewal model, because there is the potential for members to dramatically change their pledges from year to year. Some congregations intentionally avoid an open system because of the uncertainty it creates for budgetary planning.

Rabbi Debra Hachen from Temple Beth-El in Jersey City, New Jersey, uses an open renewal system because it

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## The voluntary commitment system values any gift no matter the level.

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most aligns with the values they are modeling for their members. Rabbi Hachen wants her congregants to think hard every year about what their membership is worth, betting that they will give more generously or better aligned with their means when their renewal forms do not look like dues bills.

The congregations known to have an open system all have a membership of under 300 households and managed a capital campaign in recent years. None has a particularly intentional approach to cultivating member pledges, but we can infer that the congregations' smaller size enables a level of trust in their congregants' charitable giving that could be more difficult for larger congregations to bet on.

**The suggested increase.** The most popular renewal practice — and the most pervasive among the new set of voluntary commitment adopters — is to request renewal pledges with a certain percentage or dollar increase over last year's payments. If a single percentage increase is requested, it is generally in the 3% to 5% range, but some offer multiple percentage increase options. Other synagogues take a more aggressive approach with their lower-paying members, especially those that have a higher giving capacity, asking up to 20% more. A few congregations have asked for a set increase, ranging from \$40 to \$180.

For each case, pledge letters lay out basic options: increase your pledge by a percentage, pay the sustaining amount, pay an amount higher than the sustaining amount, or set your own amount. Some congregations take the time to customize their pledge forms to automatically populate with the percentage increase calculation. Synagogues of all sizes and in all geographies use the suggested increase approach.

**Billing the sustaining amount.** A few congregations use a default billing practice that is set to the sustaining amount. Like the previous systems, synagogues that use a billing practice continue to offer additional levels of giving and leave space for self-determined

amounts. When a renewing member receives a bill for the sustaining amount but wants to pay a different amount, they simply send back their form and payment with another amount of their choosing. The difference between this approach and the other two is tactical: Members are sent a bill and then must opt out of the default sustaining amount.

See examples of membership renewal letters and forms, specifically variations on the suggested increase approach, in the Appendix of Materials of this report.

Beyond these three renewal practices, it is common for congregations to revise their renewal process as financial needs change or as members become less responsive. The Valley Temple in Cincinnati has modulated its renewal process many times after more than 15 years on the model. Other synagogues that are new to voluntary commitments tried one approach in their first renewal cycle and immediately made a change during their second renewal cycle. There is no silver bullet for the perfect renewal process in the voluntary model, because renewing — just like making an initial pledge — taps into the complex psychology of how people make charitable gifts.

What happens when members fail to submit their renewal forms? While some congregations have an easier time collecting pledge forms than they did before, many continue to lament their members' tardiness. As expected, some synagogues employ staff — typically administrators or bookkeepers — who follow up with their members until all forms are submitted. Yet others have created policies that members are billed the sustaining amount or the amount they paid the previous year if they do not submit a form themselves. Members can still opt out of that billed amount when they send in their financial commitments.

In sum, renewal practices are varied, evolving, and depend on the context.

## VOLUNTARY COMMITMENT LEADERSHIP BEYOND INITIAL IMPLEMENTATION

In the years following the initial transition, who continues to oversee and tend to the voluntary commitment model? What roles do staff, clergy, and lay leadership play, and how do those roles evolve?

In our observation, synagogues have many ways of stewarding the voluntary commitment system after its initial implementation. It is clear that ongoing lay and clergy involvement is critical to the model's success, and relying on administrative or financial staff helps ease the burden on lay leaders, even in the smallest congregations.

With modifications required for congregations of different sizes and staff composition, these are the key roles we see in long-term voluntary commitment stewardship.

Regardless of their positions, all leaders — paid or volunteer — need to share the language of voluntary giving and hold one another accountable to the values behind the model. An executive director in a congregation that is relatively new to the model spoke about the need for all leaders to be consistent with language. When her lay leadership backslides into old terminology, the staff reminds them “It's a pledge, a promise, not dues.”

Some of the synagogue leaders that struggled with the voluntary commitment system felt they did not have partners in place to make the model work as effectively as they would have liked. An area in need of attention is the triad of staff-clergy-board. Four congregations spoke about challenges with an administrative staff member as a reason they had room for improvement in managing the model. Small synagogues that rely on volunteer bookkeepers are recognizing that hiring a part-time professional to manage the bookkeeping is a good investment. These weak links in the team structure can dampen the potential of the voluntary commitment model or place an undue burden on volunteer leadership.

Ideally, there is a hand-off from staff and volunteers managing the vision and relationships to those fulfilling administrative or financial functions. An executive director of a midsize congregation talked about the

transition from the early phase of voluntary commitment to a more mature operation of the model:

“Professional administration of the model is important. Great leadership helped to research and launch this model. Then it all came together with marketing, administration, a strong team.”

Another area requiring attention is the transition from the board champions who initiated the voluntary system to a new generation of board champions. Since many

of the congregations featured in this report have used voluntary commitments for only a few years, the story of lay-level transitions has yet to be written. Many of the lay people we interviewed were integrally involved in launching the new model and continue to monitor its operation and impact, often with a staff partner. At some point, these lay leaders will phase out, and new people must be brought to the table. Working together, the many responsibilities of a diverse leadership team can help the voluntary commitment model function at its best.

**Voluntary Commitment Leadership Roles**

Lay Leadership	Clergy	Administrative Staff
Determine messages to craft and actions to take to promote financial transparency in the congregation	Actively communicate the values of the congregation	Create materials for member applications and renewals
Build relationships with members and cultivate pledges		Talk with new members and help them make initial pledges
Ensure strong member engagement programs and practices outside the realm of finances		Track and follow up on member pledges
Review financial data to evaluate the model and change strategy as needed		Report on financial progress
Model the values and use the shared language of the voluntary commitment system		

# Case Studies

## TEMPLE ISRAEL OF SHARON SHARON, MASSACHUSETTS

### Nine Years Later — Challenges and Opportunities

By Benjamin Maron

Executive Director of Temple Israel of Sharon

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Temple Israel is a 630-family conservative synagogue located to the south of Boston in Sharon, Massachusetts. The congregation was in many respects a pioneer in eliminating dues and moving to a voluntary commitment system. We made this change at the height of the recession in response to what we perceived as the limitations of the traditional dues system.

For most of the period since the congregation changed models, the commitment system has been an unqualified success. It stabilized our membership and revenue numbers, and the congregation was able to run a successful endowment campaign, raising more than \$3.2 million — 75% more than the target. (We were featured in the first UJA-Federation of New York study and a description of our experience can be read in that report). However, the last few years of the commitment system have been more mixed.

In some ways, Temple Israel is holding steady with our commitment system after nine years: The number of households at or above the sustaining amount is holding; our membership numbers are holding (after a slight drop a few years ago, they have climbed back up); and the original goals of switching to this system, creating a model that was financially welcoming and sustainable for both the synagogue and our membership, continue to be met. In other ways, however, challenges have grown over the last few years. While our membership has grown, the overall income from our voluntary dues has not. We have not significantly increased the number of households paying at or above the sustaining amount, and we have not significantly augmented our voluntary dues with other revenue (development).

For the 2014 – 2015 fiscal year, 42.5% of our households (membership units) paid at or above the sustaining unit. In 2015 – 2016, that number was 45.5%, and in 2016 – 2017 it is 46.1%. For those at or above the sustaining level in 2016 – 2017, 65.5% increased their commitments. Fewer than 10 households decreased from at or above the sustaining level in 2015 – 2016 to below the sustaining level in 2016 – 2017.

When it comes to a total of our voluntary commitments, 20% of the households pay 50% of the revenue. We have looked at age demographics for our sustaining households over the last few years, and a growing percentage of sustaining households are in their 40s and 50s (69.5% in 2014 – 2015, 71% in 2015 – 2016, and now 73.9% in 2016 – 2017). This is, of course, an encouraging finding, as it means the next generation is managing more of the burden of the synagogue finances.

The statistics aren't bad and, on the surface, suggest that our commitment system is working. However, the overall income from our voluntary dues is down (2014 – 2015 dues were \$1,057,079.60; 2015 – 2016, \$983,641.66; and 2016 – 2017, \$790,731.29 — our fiscal year to date).<sup>10</sup>

So where is the problem? Education — specifically, re-educating older households about how the commitment system works, why sustaining levels need to be met by more people, and how other fundraising or development works with a voluntary dues system. And educating new households about the commitment system, checking in throughout their first years to assess how they're doing, seeing if they have questions, and making sure they're finding value in their affiliation with the community, so that they choose to pledge at a higher level that matches their perceived return on investment.

One additional area that needs ongoing explanation, especially for older households, is how our Endowment Fund operates. Shortly after switching to the voluntary dues system, Temple Israel launched a successful endowment campaign. Understandably, there are misunderstandings as to the purpose and uses of the fund. Staff and leadership regularly hear, “We have millions in the endowment — why can't we afford to buy XYZ to do ABC?” and “Why should congregants pay at/

<sup>10</sup>When the commitment system was new, households that did not return their forms were billed at the sustaining level. This overstated revenue and has since been changed. Now if a member does not return a form, the household is billed at the previous year's amount plus 10%.

near/above sustaining level dues when there's millions in the endowment?" At Board of Trustees meetings, it has been explained how the endowment generates income for the operating budget; however, the message needs to be clarified more (and more often) to the whole congregation.

As a whole, the Board of Trustees, led by the finance team, has discussed the need for increasing communications about how the commitment system works, and not just in the month or two leading up to "commitment season," when congregants are asked in the spring to tell us their commitment for the next fiscal year. After these discussions, there was an article in the *Luach* (our print newsletter), an email to the congregation, and discussions at the board meetings — but such communications are hard to keep up unless there is real ongoing dedication to this effort.

The leadership has also discussed the revenue drop-off: When older households leave the synagogue (move out of the area or pass away), they typically have been paying a sizable commitment. Newer households join at lower levels, and it takes several new households joining to make up for one older household that has left.

However, many of these newer households are joining while the adults are in their 30s or early 40s. They are sending children to our nursery school and/or religious school, and so they have additional financial commitments to us that the older households did not. We have asked the Membership Committee and others to find "entry points" for newer households, to help these congregants find their communities within Temple Israel. Hopefully, finding more ways to get involved will result in more "value" and an increase in commitment — if not next year, when they are done paying for nursery school and/or religious school. For these households — and all households in the congregation — we need to make a value proposition, because we are not sustainable. The synagogue is determining the best avenues to reach out to each household and "sell" Temple Israel — our services, programs, classes, all we have to offer — and then ask the households to give more.

Aside from re-emphasizing how the system works and the value of Temple Israel, what's next? Temple Israel needs to focus on fundraising to build additional

revenue streams. Led by the finance team, the Board of Trustees may also consider making changes to the commitment system. There seems to be consensus among board members not to add a minimum commitment level for those households paying below the sustaining amount. It's understood that a minimum may not solve problems — rather, it could lead to reinstating abatements, determining who qualifies for a minimum, or some households dropping their commitments to the minimum. As well, the amount of money raised by this group is relatively little to the total budget and needs. The real focus needs to be on encouraging folks who are not at the sustaining level to reach it. Part of this can come about, we believe, through the renewed communication efforts described above, but we have also had conversations about trying multiyear commitments, where members are encouraged to build in increases for themselves.

In general, the voluntary commitment system continues to work for us. We are not discussing moving back to the traditional dues model. And while the system needs to be continually reintroduced and resold to the congregation, there are many who now embrace it as a core part of the synagogue. The values it represents are values we believe in. Conversations around money under the old system (I have been told, as I was not the executive director then) were often fraught. That is not the case anymore.

Rob Carver, a leader in the congregation and the initiator of the voluntary commitment program, believes the commitment system has become an essential part of the Temple culture:

"Why do we remain committed to our system of voluntary commitments, despite the challenges? I believe there are a few factors at work. First, after all of the self-examination and communal dialogue that led us to invent the system, how could we go back to the dues model? We know that traditional dues were a huge turnoff for so many people. We moved to the system precisely because of the economic and cultural dissatisfaction with the dues model. Despite any problems with the system, it is still preferable to the old model."

“Second, as leaders, I think we value the ways in which voluntary contributions really require us to work at building a community that our members genuinely value. We don’t always get it perfect, but in planning programs, staffing committees, talking with congregants, I think that the voluntary system changes the dynamic for the better. We need to be committed to engaging members, because we cannot rely on dues. We also have a better opportunity to build community, because there is less rancor around money.”

This system is not guaranteed to sustain itself, though. Even in the relatively few years that we have been operating, the profile of the congregation is changing. Some of our longtime members have moved away, passed on, or aged out of their active engagement. Newer members have arrived, and they were not here when we had extended community meetings about financial stability and sustainability. One ongoing challenge is: How do we continue to retell the story of our liberation from traditional dues?

## CONGREGATION BETH SHALOM SANTA CLARITA, CALIFORNIA

Situated in northern Los Angeles County, Congregation Beth Shalom is a small Conservative synagogue currently serving a membership of 236 households. Before adopting the voluntary commitment model in 2013, Beth Shalom was almost half this size. As a heavily volunteer-driven community, the congregation maintains a budget of almost \$700,000, including a preschool. Its full-time employees include a preschool director, synagogue administrator, and a rabbi, Ronald Hauss, who was hired full-time in the same year the congregation changed its membership model.

Rabbi Hauss' relationship with the community has spanned four decades. He served once as the congregation's High Holiday cantor in the 1970s and subsequently served in 1976 and in 1985 as its full-time rabbi. Operating on a shoestring budget, the lay leadership and synagogue administrator tightly manage the congregation's finances.

Congregation Beth Shalom's story is an ideal example of a congregation that tracks data well, and is of particular interest because it took the leap to a voluntary commitment system at the same time as it undertook both a rabbinic transition and a capital campaign.

### Before the Change

Congregation Beth Shalom had been on a membership roller coaster. The effects of the Great Recession alongside the demographic realities of the Santa Clarita Valley were making it difficult to maintain and recruit members. Prior to the recession, Beth Shalom's membership exceeded 200 families; by 2010 it had dropped to 142 families, and by 2012 it reached its nadir at 126 families. With limited visibility in the community and Jews increasingly disengaging from synagogue life, Beth Shalom needed a drastic change.

In 2013 — the same year that Rabbi Hauss returned full-time and the same year the congregation turned its dues structure inside out — Beth Shalom's leadership committed to moving forward with constructing a new sanctuary. This was a huge risk for its contracted community. The motivation was not so much to attract new families, but rather to build for the existing

community and hold High Holiday services "at home." As one of only three congregations in the Santa Clarita Valley, Beth Shalom stands out as the only community with its own permanent sanctuary building. They have a broader goal of augmenting the synagogue's role in the community and becoming a center for Jewish life in the Santa Clarita Valley, an area remotely located from the nearest JCC or federation.

Beth Shalom's prior membership revenue model comprised an arbitrary fixed-dues schedule demographically structured by family status (singles and families) and age (a senior rate). Its dues-relief process involved interviews with applicants. Lay leaders felt that this process and the arbitrary dues structure were a "barrier to membership." Recognizing that they could wait no longer, past President Ken Greenberg, Former VP of Finance and current President Phil Levy, and the Beth Shalom membership committee spent some five months researching their options, putting together a proposal for their community, and revising membership forms. They were highly influenced by Ron Wolfson's book *Relational Judaism*, which served as both a motivation and guideline for the transition.

The team's voluntary commitment proposal was well received by board leaders and major patrons, and they published an FAQ to properly communicate the change to the full congregation. As Levy said, "If we have something valuable to offer and we communicate it properly, they'll step up and they'll pay. We called it a leap of faith."

The new Voluntary Pledge Program was put into effect in July 2013, and the membership forms have been modified and improved over time to adapt to the congregation.

### The Voluntary Pledge Program

Congregation Beth Shalom has set its sustaining amount at just \$1,000 — the lowest level we saw in our sample. This is a standard calculation of its budgeted operating revenue divided by its projected number of households. The congregation's membership form provides for various suggested levels of voluntary pledge amounts and discloses the sustaining amount to guide member giving. For renewing members, the form requests a 20% increase over the previous year's commitment.

Beth Shalom makes it clear that the synagogue can issue a mandatory assessment if its revenues fall short of expense requirements, but it hasn't needed to invoke this policy. However, in the first fiscal year of the program, it went back to the congregation to raise additional funds and ultimately received another \$9,000.

### Additional Factors

Lay leaders are very positive about the dues model change, but they are also careful to note that they had "the perfect storm" of conditions to drive up membership: voluntary pledges, a new building, and the return of a beloved rabbi. Rabbi Hauss attracted members from his former congregation to join Beth Shalom. President Phil Levy said that even with these reasons for people to affiliate with their congregation, eliminating the barrier to membership serves to boost retention and attract new members well into the future. Moreover, Beth Shalom leaders have newly emphasized fostering relationships and are mindful of connecting the congregants at every opportunity — through affinity groups, host and usher roles at services, and personal outreach to members by the leadership.

Thanks to careful record keeping by the financial experts in its lay leadership, Congregation Beth Shalom has an excellent grasp of the numbers behind its new membership model. While compiling these figures can be daunting, Levy says, "The metrics are vital to objectively evaluating whether the program works." Over time, Beth Shalom has developed a series of measurements tracking the development of both voluntary and total commitments. Membership commitment data is extracted from the synagogue administration system (Rakefet) and imported into a spreadsheet for the various analyses. Beth Shalom is an ideal example of managing data, which gives its leadership the confidence to assess the success of the model in their community.

### Outcomes

- **New members.** An 87% increase in membership over three years is no small feat. However, the revenue increase in that time, while still noteworthy at 19%, didn't keep pace with the membership growth. When they crunched the numbers in 2016, they learned that member families that joined Beth Shalom since

2013 are generally giving below the sustaining level, averaging \$765 per household. New households include empty nesters, seniors, and families with children. Members that joined in or before 2012 averaged \$1,391, giving some 80% more than newer members.

The increase in membership has resulted in increased enthusiasm and attendance at many synagogue and affiliated events. Another positive impact from this influx is modest increases in both religious school enrollment and tuition income. Religious school enrollment increased from 78 in 2012 to 90 in 2016. Tuition revenues increased from a low of \$71,000 in 2012 to \$80,000 in 2016. Beth Shalom continues to charge school fees according to a fixed schedule, so special arrangements are needed in some cases. Overall membership gains tend to increase religious school enrollment, providing yet another revenue source.

- **Changes to member giving.** In 2016, about 20% of renewing members held steady in their voluntary pledge commitment, compared with 2015. Forty-five percent increased their gifts and 34% decreased. These figures are rather consistent with 2015, when 24% of commitments remained the same, 47% increased and 29% decreased. Beth Shalom also tracks changes in giving by year of affiliation and notes a positive correlation of commitment development with longer membership tenure. Pledge collections are also in much better shape than in the past, and leaders are finding that they rarely make collection calls anymore.
- **Fundraising.** Due to increased member engagement and connections, Beth Shalom's fundraising events are now more widely attended than in the past and tend to be successful. These generate revenue for the synagogue. One negative effect of the dues change was a deep reduction in the synagogue's scrip program, which brings in income through gift card purchases with major retailers. This program had been mandatory in the past, generating \$20,000 in 2012. It was also changed to a voluntary system at the time that the Voluntary Pledge Program was established, and by 2015 the scrip program took in only \$6,000. Fundraising activities overall generated \$35,000 in revenues in 2015, compared with \$19,000 in 2012,



and leadership expects an uptick in 2016 with the addition of a new memorial plaque wall and tree of life. Capital donations have improved as well, with more than \$100,000 raised during the 2015 and 2016 fiscal years for specific capital projects, over and above the donations solicited for the new sanctuary building. Funding for the new sanctuary building, to the tune of more than \$500,000, was substantially provided through the liquidation of pledges (pledges paid by congregants) along with a pledge-backed bank loan. (A bank provided a loan in anticipation of the payment or liquidation of the building fund pledges)

- Member engagement and volunteerism. To cap off Beth Shalom's successes, there is a renewed sense of the synagogue as a gathering place. The community boasts a minyan for all Shabbat evening and morning services, as well as festivals. People are showing up and more actively participating in events and stepping forward to plan new programs. Successes include increased participation in Sisterhood and Men's Club programming, a well-attended monthly film screening organized by a member, a monthly happy hour fundraiser at a local restaurant, and an energizing religious school open house to commence a new academic year.

The calendar is full of meetings, presentations, adult study classes, and social activities. Careful calendaring has become crucial to coordinate frequent meetings and events. In the summer of 2015, nearly 40 people participated in a congregational tour to Israel led by Rabbi Hauss. Such participation would not have been

possible in 2012. The voluntary commitment model is one reason for this increased engagement, alongside heightened member relationships and the rabbi's leadership. The voluntary commitment model has eliminated the stress and possible resentment that can arise from "compliance" with a mandatory dues model, thereby eliminating the barrier to membership for both new and existing members. President Phil Levy says of the Voluntary Pledge Program, "It really seems to have renewed the spirit of the entire synagogue community."

### **What's Next**

In their fourth year of the voluntary commitment model, Beth Shalom's leaders aim to eliminate fundraising for operational needs beyond the scope of the Voluntary Pledge Program. Its membership renewal messages have explained that, with sufficient voluntary commitment revenue, fundraising to support specific programming or capital needs could replace fundraising for general operational needs. Including High Holiday tickets and pledges, this budgeted target was \$1,243 in 2016; however, the community's response came up short, averaging \$1,036.

Lay leaders also want to work closely on increasing new members' giving so that those who enter at a low rate are directly encouraged to be more generous in subsequent years. Beth Shalom tracks its voluntary pledges by affiliation year and expects that many members will increase their support as their relationships mature and strengthen.

## Congregation Beth Shalom At a Glance

	Pre-Voluntary Commitments	Post-Voluntary Commitments
Membership households	2011: 142 2012: 126	2013: 188 2014: 194 2015: 218 2016: 236
Total synagogue revenue budget (excluding preschool)	2011: \$383,000 2012: \$355,000	2013: \$361,000 2014: \$356,000 2015: \$405,000 2016: \$465,000
Average dues or pledge amount received per household (including High Holiday pledges and tickets)	2012: \$1,786	2013: \$1,193 2014: \$1,132 2015: \$1,013 2016: \$1,036
Percentage of members giving at the sustaining level	N/A	2015: 1% 2016: 3%
Percentage of members giving above the sustaining amount	N/A	2015: 33% (representing 71% of pledge income) 2016: 34%
Income sources and percentage of the full budget	Dues: 44% School fees: 18% High Holiday tickets and pledges: 10% Fundraising: 14% Other donations: 7% Preschool net cash flow: 7%	Pledge program: 46% Religious school fees: 20% High Holiday tickets and pledges: 14% Fundraising: 8% Other donations: 7% Preschool net cash flow: 5%
Other fundraising activities	Mandatory scrip program, website sponsorships, auxiliaries donation, galas and special event sponsorships, capital campaign	Voluntary scrip program, website sponsorships, auxiliaries donation, <i>mishloach manot</i> , galas and special event sponsorships, capital campaign

### From Congregation Beth Shalom's website:

Five years ago, the CBS Executive Board decided it was time to change the way our congregation viewed membership. Instead of "dues," a new model was designed which would turn the conventional approach on its head. The decision was made to move to a Voluntary Pledge Program. Looking back, this revolutionary idea seemed fraught with risk.

As other temples had experienced, economic pressures put many congregants in a position of making the choice between re-joining or not. How could CBS provide the services and support our congregants relied upon without knowing we could afford to deliver? Could we continue to be the spiritual center of the Santa Clarita Valley?

The answer to both questions is yes, and more. This unique path to the benefits of membership is working at Congregation Beth Shalom.

## TEMPLE B'NAI OR MORRISTOWN, NEW JERSEY

Among the synagogues that are relatively new to the voluntary commitment model, Temple B'nai Or's story stood out for its excellence and thoughtfulness. Situated in suburban New Jersey, about 35 miles west of New York City, the temple serves a membership of nearly 500 households with an annual budget that exceeds \$1.7 million. Affiliated with the Union for Reform Judaism, Temple B'nai Or welcomed a new spiritual leader, Rabbi Ellie Miller, in 2015, and it's proud of its identity as a synagogue devoted to social action and music. Although B'nai Or was included in our prior study on voluntary dues, the congregation had newly transitioned to its Kehilah Membership Program in the summer of 2014, just before that study was published. Limited preliminary details were available at that time about the outcome of its dues transition.

Temple B'nai Or's story illustrates our key finding that shows initial membership bumps in the first and second years, with the third year somewhat sobering. Of particular interest is that Temple B'nai Or overhauled its finances to right-size them with current membership parallel to its dues change.

### Before the Change

Prior to the dues change, B'nai Or maintained a fair-share dues model that asked members to pay according to their household income. Without a requirement for income verification, there was already a culture of member-determined dues levels accompanied by distrust in the honor system. B'nai Or's leaders report that many households often selected the level of dues corresponding with the lowest income level, and the leadership did not ask any questions. An estimated 30% or more of the membership was on dues relief, which involved filling out a form to be officially approved for a reduction.

Moreover, the renewal process itself was a challenge. Less than one-third of congregants returned their dues forms each year, and uncollected pledges stood around 20%, leading to an unbalanced budget by the end of each fiscal year.

At the time, lay leaders were frustrated with the status quo of membership: Not many new members were joining annually, and not enough people were paying. Temple leaders knew they wanted to shift away from the fair-share model but did not know what should come next. Over nine months, a committee led by the board treasurer and comprising the executive director and a dozen members researched various dues models and initiated a change toward the voluntary commitment system. Committee members included those with financial and marketing backgrounds, major donors, and an intentional mix of members representing various age demographics in their congregation. The group brought their proposal to the board in March 2014, held town hall sessions with members in the spring, and received approval to move forward in April. The result of their effort was called the Kehilah Membership Program.

### The Kehilah Membership Program

Temple B'nai Or's model currently features both a financial and a volunteer pledge:

- The financial pledge (see form in Appendix of Materials) presents a sustaining amount of \$1,380 per adult. B'nai Or uses the open renewal system defined on page 23; however, it asked those giving below the sustaining level for a minimum \$136 increase in the 2016 membership season. Temple policy is that members must give something, but no specific minimum donation is required. Leaders report that some interfaith couples have chosen to pay at the sustaining level for both adults in the family, and some pay the sustaining level for just one adult.
- A three-part volunteer pledge (see form in Appendix of Materials) requests that members choose at least one of the following options in addition to their financial pledge:
  - a. Lending expertise via professional skills and personal hobbies.
  - b. Contributing time to a synagogue standing committee, project, or task force.
  - c. Making an additional donation of any size to various temple funds. This option allows members to make a symbolic donation in acknowledgment that it takes more than dues to run the temple; some seniors at B'nai Or choose this option in lieu of a volunteer pledge.

Instituting a volunteer pledge ushered in a new way of understanding the congregation's members. B'nai Or's lay leadership is now better equipped to call on the right people for a host of volunteer tasks. Based on responses to these volunteer pledge forms, the role of soliciting lay participation continues to lie with board members and not with staff, which is an intentional choice of congregational leaders.

A key component of the Kehilah Membership Program is an annual State of the Union–style event held in January that reports to the congregation the synagogue's financial health. This sets the stage for additional fundraising needed in the spring and subsequent planning and budgeting activities for the upcoming fiscal year. Although only about 50 members attend this event each year, synagogue leaders send a summary of the meeting, including comments, to the full membership. Through these actions, leaders continue to model the basic value underpinning their contribution system: transparent communication.

#### **Additional Factors**

Simultaneous to the dues transition, B'nai Or's staff and lay leaders overhauled their costs to right-size the congregation from one oriented for about 750 families — a size they sustained in the past but is no longer realistic — to one serving 500 families. A two-year database cleanup process led them to remove about 100 households from their membership rolls, giving them a more accurate picture of their congregation.

Right-sizing involved the congregation:

- Reducing administrative staff size and outsourcing bookkeeping.
- Renegotiating contracts with vendors, from the photocopier to gas services.
- Shifting to primarily electronic mailings.
- Changing from a monthly to a quarterly bulletin to reduce postage.
- Restructuring payment policies for its religious school and b'nai mitzvah fees. These firm but fair policies require that families pay up front or set up a payment plan prior to beginning their studies, which allows the religious school to break even on direct costs and no longer rely on temple subsidization beyond facilities usage.

It is important to place the temple's dues change in the context of this holistic approach to organizational finances. Taken altogether, these steps are tremendously successful. Cost overhauls helped the temple's leadership feel honest and confident about their budget and the sustaining amount when approaching the community for Kehilah pledges. Containing costs was an important step to keep the sustaining amount in check. Once the sustaining level rises too high, this may be a red flag that a full financial review is needed.

Another contextual factor is B'nai Or's rabbinic transition in 2015. The longtime rabbi retired only a year after the temple instituted the dues change, and he had supported the voluntary model. Informed about the new membership model, Rabbi Miller took on her own research to understand it before coming into the position. As with most clergy transitions, there was a natural attrition of the membership, yet the temple was able to keep both its budget and membership size steady through the leadership change.

#### **Outcomes**

- **New members.** B'nai Or welcomed just under 150 new families in the past three years, representing a diverse mix of demographics that reflect the congregation as a whole. In the first two years of Kehilah, the majority of new members joined at the sustaining level, but some also joined well below. The giving curve was about the same as before: one-third gave below the sustaining amount and about 10% were significantly below. In the words of Executive Director Wendy Gottsegen, "You don't necessarily change the bell curve with this model, but you absolutely own who you are." B'nai Or's religious school enrollment also increased moderately, and 96% of religious school families are currently members.
- **Changes to member giving.** In the first year of the Kehilah program, some members who paid higher fair-share dues dropped down to the sustaining level. However, more people stepped up to the sustaining amount, so the total dues revenue ultimately evened out. Incredibly, B'nai Or has had a 100% return rate on members' annual pledge forms that are primarily submitted electronically. It is clear among congregants that no one is considered renewed until they have submitted information about their pledges. Moreover,

outstanding pledges are now extremely low. Members have been very positive about the change, promoting the synagogue to their friends. Members indicate that they understand why B'nai Or needs their money, and the temple has eliminated a "cycle of bad feelings" for those who can't afford traditional dues.

- **Finances and fundraising.** Today, the congregation's budget, inclusive of the preschool and religious school, is balanced. When the Kehilah program began, synagogue leaders stopped budgeting for extra fundraising income beyond voluntary commitments because those goals were not previously met. Any fundraising activities now planned by the temple are incremental to the operating budget or targeted specifically for capital budget needs. Money raised for synagogue operations is generally allocated to expanded programming or filling any revenue shortfalls. Fundraising toward the capital budget has allowed B'nai Or to replace two roofs and the cedar shingles that line its sanctuary. Dedicated capital campaigns have clear messaging alongside the Kehilah program.
- **Member engagement and volunteerism.** Unlike a number of the newer adopters of voluntary dues, Temple B'nai Or can point to a clear correlation between its dues change and increased member engagement, thanks to the volunteer commitments required at the time of renewal. Messages from the leadership were clear: Volunteerism is essential to the temple, and charitable giving and volunteering are weighted the same.

In the first year of their Kehilah program, their committees and task forces have blossomed, with many new people stepping in to serve. B'nai Or has an active Membership Committee of 18 people, and its Social Action and Lifelong Learning Committees initiate substantial organizing and programming. These committees grew in the first year of Kehilah and have maintained their activity into the third year. The growth

of volunteering has allowed B'nai Or to bring new life to the community's niche areas of social action and music, which are now showcased by new member leadership with new ideas. In the past, the nominating committee struggled to surface new board members. However, in 2015, B'nai Or's leaders reported that there were plenty of people interested in board leadership, with many newcomers expressing genuine enthusiasm to serve on the board.

### What's Next

In the summer of 2016, entering their third year of the Kehilah Membership Program, B'nai Or leaders asked members giving below the sustaining level to increase pledges by \$136 over the previous year's pledge. Unfortunately, the average pledge declined by about \$50 per household, and many gifts leveled off even if they did not decline. Halfway through the third year, 35 new member families had joined the synagogue, but this gain did not offset membership losses. Reasons for attrition were varied and expected, though it was noted that member deaths were higher than usual.

The budget holds steady, and there are very few expenses to cut, which means that the congregation needs other strategies to help members increase their donation level. The Kehilah Task Force that spearheaded the initial transition to the new model has reconvened and is discussing how to react to this more sobering year of fundraising. They are considering member outreach efforts for pledge cultivation, specifically focusing on at-risk segments of giving. A question is on the table about creating a minimum pledge requirement. While this third year could just be a more challenging year, the themes raised by B'nai Or's story are in line with the themes of this study: The voluntary commitment model is a development model, and synagogues may well need to embrace relationship-based strategies for fundraising and member cultivation to maintain success year after year.

## Temple B'nai Or At a Glance

Category	Pre-Voluntary Commitments	Post-Voluntary Commitments
Membership households	2013 – 2014: 550 (inflated by about 100 households*)	2014 – 2015: 465 2015 – 2016: 465 2016 – 2017: 445 (midyear)
Total synagogue revenue budget	\$2 million (before cost overhauls)	\$1.7 million
Average dues or pledge amount received per household	\$2,000	2014 – 2016: \$2,000 2016 – 2017: \$1,900
Percentage of members giving at the sustaining level	N/A	2014 – 2015: 33% 2015 – 2016: 33% 2016 – 2017: 37%
Percentage of members giving above the sustaining amount	N/A	2014 – 2015: 15% 2015 – 2016: 13% 2016 – 2017: 14% (about 30% of total pledge income)
Income sources and percentage of the full budget	N/A	Kehilah: 53% Preschool: 22% Religious school: 17% Fundraising: 3% High Holiday appeal: 2% Building rentals: 2%
Other fundraising activities	High Holiday appeal, various fundraising events	High Holiday appeal, annual capital fundraiser, various fundraising events

\*As we saw with a few synagogues, the transition point from one financial model to another involved pruning the member database. Temple B'nai Or's staff identified many people who were on the membership roster but had not paid dues in recent years. Reaching out to these individuals to verify their membership status helped B'nai Or identify a more accurate membership figure with about 100 fewer households. Additional financial data prior to 2014 is also no longer available as a result of B'nai Or's transition to new financial systems, which took place at the same time as the new dues model.

### From Temple B'nai Or's website:

At Temple B'nai Or, we strive to enable families to join with us and stay with us for generations. Our membership program adopts the emerging model that eliminates traditional dues and instead asks members for a voluntary financial commitment and a volunteer pledge. We call it Kehilah — Hebrew for community

— to signify the importance of each member's role and responsibility to each other and our traditions. We now ask our members to contribute financially and by participating in temple life based on the needs of the Kehilah, not based on age or income. Together, we make a commitment to sustain Temple B'nai Or.

# Recommended Practices to Successfully Sustain the Voluntary Commitment Model

What can congregations do over time to sustain a voluntary model — and be successful? The 10 recommended practices below are core practices that congregations featured in this report have either taken on or indicated a strong desire to start doing.

Area	Recommended Practices
Communication	<ol style="list-style-type: none"> <li>1. Reintroduce the voluntary commitment model.</li> <li>2. Continuously attend to financial and communal transparency.</li> <li>3. Develop membership renewal messages and materials to increase pledges over time.</li> </ol>
Engagement	<ol style="list-style-type: none"> <li>4. Build a culture of member engagement through quality programming and community relationships.</li> </ol>
Fundraising	<ol style="list-style-type: none"> <li>5. Prioritize individual connections with members and prospects.</li> <li>6. Pay attention to member giving at and above the sustaining level.</li> <li>7. Recommit to ongoing fundraising.</li> </ol>
Administration	<ol style="list-style-type: none"> <li>8. Track and monitor member giving.</li> <li>9. Build a strong administrative backbone.</li> </ol>
Leadership	<ol style="list-style-type: none"> <li>10. Cultivate new generations of voluntary commitment leaders.</li> </ol>

## COMMUNICATION PRACTICES

1. Reintroduce the voluntary commitment model. Nearly all of the congregations in our study that transitioned to a voluntary commitment model went through a significant process to ready the congregation for the change. This was a major subject that we addressed in the first voluntary dues report published by UJA-Federation of New York. Congregations spent many months or even years researching other congregations' experiences, speaking with their own members, holding town hall meetings, and discussing the change at the board level.

In this second report, some congregations noted that after the system had been in place for a number of years, there was a need to reintroduce the idea of voluntary commitments to the congregation.

One synagogue president said: "We spent all of this time and effort eliminating dues, but five years later we have a number of members who joined our synagogue after we had already made the change. We also have some folks who have forgotten why we made the change in the first place, so there is not the same energy and understanding as there used to be, and we need to remind people of why we do what we do."

This report recommends that congregations make an effort to reintroduce the system to their full membership — not only to new members — highlighting the rationale for why voluntary commitments are important in the first place. Our findings show that about four to five years after the initial change, this work becomes imperative.

**2. Continuously attend to financial and communal transparency.** Financial transparency at the moment of a dues change is essential, because it builds trust between members and leaders and sets the stage for members to make their very first pledge in the new model. However, synagogues must also prepare to continuously make financial and communal matters transparent. This serves to maintain member trust and illuminate the many reasons a pledge increase is needed, what the sustaining amount stands for, and how essential their voluntary contribution is to the complete financial picture.

**3. Develop membership renewal messages and materials to increase pledges over time.** The synagogues we interviewed have employed one of the three approaches to membership renewal outlined on page 23. Synagogue leaders must therefore evaluate their renewal materials each year to be sure the information is sufficiently transparent, reflects current and projected financial needs, and clearly communicates the reasons behind suggested pledge increases. (See renewal forms in Appendix of Materials.)

## ENGAGEMENT PRACTICES

**4. Build a culture of member engagement through quality programming and community relationships.** Simultaneous to or shortly after a dues model change, many rabbis, education staff, and lay leaders newly emphasize improving their programming and outreach efforts. While it is impossible to conclude that synagogues went on to improve their engagement efforts because their dues culture shifted, it is worth noting that it is a common story among voluntary commitment synagogues.

The message for leaders looking to adopt and sustain a voluntary model is that even in a relationship-based giving model, in which the “transaction” of membership is reduced dramatically, members still come for the people and for quality services and programs. Making a dues change without attending to these basic needs may undercut the synagogue’s ability to engage and sustain members. Put differently, moving to a voluntary commitment system may help set the stage for relationship-based culture changes in different areas of synagogue life.

## FUNDRAISING PRACTICES

**5. Prioritize individual connections with members and prospects.** It may go without saying, but synagogue leaders must prepare to cultivate strong and extensive connections to both current and prospective members. These relationships are foundational for maintaining the model. In some synagogues, the cultivation process requires a lot of time by design. Examples include Temple Beth El in Aptos, California, and Congregation Bet Shalom in Tucson, Arizona — both ask new members to sit down with the rabbi and the executive director in separate meetings. The rabbi takes the primary role in discussing the community, while the administrator “closes the deal” by sharing the synagogue’s financial needs and confirming amounts that each family is willing to pay.

In most other synagogues featured in this report, however, there are no extensive in-reach campaigns to ensure strong and increased pledges from year to year. This exposes a major weakness in the voluntary commitment model as it is currently administered by synagogues across the country. Those that have instituted a relationship-based approach to member giving have primarily done so in conjunction with large capital campaign appeals. After going through the experience of capital campaign cultivation, leaders of both large and small synagogues realize this process is so financially successful and interpersonally positive that they want to make it an annual practice to solidify and strengthen their membership commitments.

This level of pledge cultivation can be time consuming, so synagogues should consider developing an achievable approach based on their circumstances and the time and talents of their leaders.

**Such approaches can include:**

### **Team-driven outreach.**

Trained board leaders and clergy should divide membership lists to set up conversations with each member household. These conversations should broadly discuss the synagogue and members’ lives and include a discussion of the household’s financial capacity to further support the congregation.



## Multiyear pledge requests

Through the personal outreach process, synagogue leaders can request that member households consider pledging for multiple years at a time, both to reduce the number of asks the synagogue makes and to allow for longer-term financial planning. While we did not observe this practice, it is common among nonprofit professionals charged with major donor cultivation in connection with capital or annual appeals.

## Gradual community cultivation.

Instead of trying to personally engage members about their pledges every year, some synagogues find it more manageable to segment their membership list and target a certain percentage of households over multiple years. As reported earlier, Valley Temple in Cincinnati has focused on increasing the pledges of one third of their membership each year, allowing them to reach the whole community over a three-year period.

**6. Pay attention to member giving at and above the sustaining level.** As reported by so many of the synagogues in this report, large gifts from a small percentage of congregants really do pay the bills. As found on page TK [Finding: *Giving At and Above the Sustaining Level*], we recommended that synagogues:

**Ensure that at least 10% of congregants give above the sustaining level.**

**Aim to raise about 35% to 40% of the total pledge collection from these larger gifts.**

While a small percentage of the congregation should give above the sustaining amount, congregations need to have a larger percentage giving at the sustaining rate — but perhaps not as many as one might think. **As we found, the average percentage of members giving exactly at the sustaining level hovers at just above 20%.** This may be a good guidepost to set, depending on an individual synagogue's financial circumstances.

Most important, the clear implication for synagogues seeking to adopt and sustain a voluntary commitment model is that they must undertake targeted, ongoing fundraising efforts to collect larger pledges from a relatively small percentage of the congregation with a higher giving capacity.

**7. Recommit to ongoing fundraising.** Most congregations found that moving to the voluntary commitment system did not eliminate the need for ongoing development endeavors. While a few congregations note that they want to eliminate certain appeals to reduce the number of times that members are asked to give, most congregations continue their previous fundraising work and some have expanded their fundraising activities. These changes are based on the ebb and flow of lay leaders' interests and capabilities and on new priorities developed by synagogue staff members.

The results of this report recommend that synagogue leaders holistically develop the year's calendar of fundraising activities, including the membership pledge season, and adjust them based on what fundraising these leaders project their congregants will experience in any given month.

The bottom line is that both professional and lay synagogue leaders need to develop and hone their fundraising skills.

## ADMINISTRATIVE PRACTICES

**8. Track and monitor member giving.** Regardless of their dues model, all synagogues should take steps to accurately track financial data. To sustain a voluntary model successfully, however, it may not be enough to have a bookkeeper log pledges and post payments in financial software each membership cycle.

It is clear from this report that the congregations most equipped to confidently sustain a voluntary commitment model are those that have a system for tracking and monitoring member giving over time — and that their leaders (lay and staff) actively analyze and use that data. A handful of the newest adopters of this model are tracking data about their membership's giving habits and patterns at an impressive level. They feel confident knowing specifically what the dues model is achieving in their communities, and they know how to customize the ask when membership season arrives each year. Without this data readily available, synagogue leaders still understand whether their model is generally successful, but they are not confident nor equipped to know how to build on this strength to further improve their outcomes.

Tracking and analyzing member giving data is incredibly important for evaluating the success of the voluntary commitment model and other fundraising initiatives. It helps synagogue leaders understand what the leadership can do to improve member relationships and their financial investment in the community. Since tracking data is one of the biggest challenges that nonprofits, including synagogues, face, we suggest that they track:<sup>11</sup>

- Average size of member pledges, ideally tracked by length of membership, age, family size, and other demographics of interest to the community.
- Percentage of member households giving at, below, and above the sustaining level.
- Percentage of total pledge revenue raised from those giving at and above the sustaining level.
- Percentage of new members joining at, below, and above the sustaining level.
- Percentage of unpaid pledges.
- Changes to total household giving from year to year and over time (tracked as an increase or decrease, if not a more specific percentage change).
- Member participation rates in fundraising efforts beyond the voluntary commitment pledge.

*For insights into becoming a data-driven synagogue and in data-tracking systems, refer to UJA-Federation of New York's prior studies: Vision and Data: Essential Building Blocks for Successful Synagogue Change (2012), A Guide to Synagogue Management: Research and Recommendations Updates (2014), and Data Maturity for Synagogues: Incorporating Data Into the Decision-Making Culture (2015).<sup>11</sup>*

**9. Build a strong administrative backbone.** To both design a membership renewal process well and successfully track and monitor member giving, synagogues must have in place strong administrative systems and capable people. In some synagogues, the administrative work behind their voluntary commitment model is accomplished by skilled lay leaders —

treasurers, past presidents, or volunteer bookkeepers — who have the expertise and time to give to the synagogue.

But to maintain administrative strength over time, synagogues must build an institutional approach to financial administration that does not depend on any one person, no matter how capable that person may be. One executive director said about the strength of the lay-driven model, “You’re only as good as your lay leadership.” This references the important follow-up work conducted by lay leaders to ensure that members are making their pledges. Plenty of lay leaders, however, point to their full- or part-time administrative staff as a source of success (and in some cases, as a source of frustration) in managing the logistics of the model.

## LEADERSHIP PRACTICES

**10. Cultivate new generations of voluntary commitment leaders.** Synagogue boards know how important it is to build a leadership pipeline, but the work of identifying and nurturing new leaders is often a low priority. Nearly as important as deciding who the next president will be, lay champions of the voluntary commitment model should actively think about who will fill their shoes a few years down the line. Considering the roles laid out on page TK can help synagogues identify people with the right mix of skills and interests. Some leaders will need more extensive financial acumen, while others will need relationship-oriented skills for member support and connection.

The roles and responsibilities of staff, lay leadership, and clergy should be topics of conversation in both congregations that are currently using voluntary commitments and congregations that are planning to move to the model. While some congregations will necessarily rely more heavily on their lay leadership and others on their staff, determining the roles that each leader will play is an important part of planning — and helps the entire leadership team share in stewardship of the model.

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<sup>11</sup>[ujafedny.org/get-info/for-synagogues/synergy-reports/](http://ujafedny.org/get-info/for-synagogues/synergy-reports/) for all SYNERGY related reports noted throughout this report.

# Conclusions

The voluntary commitment system is reported by synagogues as successful in helping them align their financial systems with their values — putting relationships first, increasing their membership numbers, and raising revenue. It is also successful in creating an atmosphere in which conversations around money are easier and the membership is more deeply and meaningfully engaged. Along with the positive findings of this report, however, are significant questions that remain about sustaining the system.

Veteran congregations — those using the system for more than three years — report ongoing success in maintaining financial stability. At the same time, they also cite anxiety in needing to stay vigilant to consistently “resell” the model to their membership. Most concerning for all synagogues is the low giving levels at which new members are joining. The voluntary commitment system has effectively brought in members, but the question remains as to whether those new members will raise their pledge levels to sustain the synagogue. Under a traditional dues model, there is often more significant pressure placed on members by requiring them go through an abatement process. Some congregations are both putting systems in place to increase pledging over time and making this a communications priority with the congregation.

Ultimately, the health of the congregation goes well beyond financial models. Demographic issues facing the Jewish community and the particular institutional values and strengths of a given congregation will speak more strongly to the ongoing viability of a synagogue than the financial model will. Nonetheless, financial models can impact a synagogue well beyond the bottom line of the balance sheet. This is one of the lessons repeatedly learned from this research: Congregations wanted to report more about the cultural shift that switching models engendered than about their finances, even when they were doing well financially.

One of the cultural shifts of this model is to more closely align synagogues with other nonprofits as it relates to their approach to member cultivation. By eliminating the payment oversight that goes hand in hand with traditional dues, what congregations are really saying is that every dollar that comes into the synagogue is a development dollar. It is this change of attitude — a shift to the centrality of member relationships — that is a core factor of the model’s success. For generations, synagogues believed that dues were pledges that belonged to the synagogue; leaders and staff often did not properly thank members for their dues, and they may

have grumbled when they thought members could do more. But synagogues are in a fundamentally different moment in history. Voluntary commitment congregations adopt a posture of gratitude for all gifts. There is an understanding in these congregations that money pledged is money that may not have come in at all.

The other broad cultural shift that the model produces is one that enables synagogue leaders and members to finally disentangle the concept of membership from its historic relationship with money. Far too often, the decision about joining or staying a part of a synagogue is seen by both members and leaders as a financial one. Synagogue membership can instead focus on people’s wishes to be part of a sacred community, and money is given with the recognition that such communities have expenses. This doesn’t mean talking less often about money. Voluntary commitment synagogues do, in fact, end up talking more about money than other synagogues because of the need to remind people of the financial costs of running a community. But these conversations are grounded in trust and honesty on all sides. Often such ideals are hard to work out in reality, but synagogues should be nothing if not committed to what is possible in human relations.

Of course, not all synagogues need to become voluntary commitment synagogues to share in these values. A thoughtful process and discussion will have its own positive effect in moving congregations forward, regardless of the chosen dues model. Understanding the details of how voluntary commitment synagogues approach membership and money may help all synagogues consider the implications of the choices to make in designing and redesigning Jewish communal institutions of the future. The values embedded in the voluntary commitment system — a welcoming spirit, transparency, valuing each individual for what he or she can bring to the community — can be expressed in other financial models. Focusing on these values can help synagogues thrive.

# Tools and Resources

## QUESTIONNAIRE TO SUSTAIN THE VOLUNTARY COMMITMENT MODEL

This questionnaire was developed for synagogue leaders to assess their ability to maintain and sustain the voluntary commitment model. It is based on the 10 recommended practices that are listed on pages 37. Synagogues currently using a voluntary commitment model will find this questionnaire most helpful.

Congregations completely new to the model should first complete the Diagnostic Readiness Tool on pages 45, which we have updated since the 2015 UJA-Federation report to reflect the most current thinking on synagogue readiness. Before making the decision to move to the voluntary commitment model, review this questionnaire to understand the steps to take concurrently with and after the initial implementation of the model to sustain it well. We recommend that individual board leaders log their responses to this questionnaire before discussing the answers with a larger group.

### Communication Questions

#### 1. Reintroduce the voluntary commitment model.

How long has it been since you asked your membership to discuss the voluntary commitment system or synagogue finances more generally — either in large congregational forums or small parlor meetings?

To what extent do you feel that longer-term members still understand and appreciate the financial model?

To what extent do you feel that incoming or newer members know about and appreciate this financial model?

#### 2. Continuously attend to financial and communal transparency.

Outside of your annual congregational meeting, how has your leadership sought to be transparent with the membership about financial or general communal matters? Do you feel that you went far enough to share information?

If anything, what more could you do to help members sufficiently understand the synagogue's circumstances to promote greater loyalty and financial support?

Reflect on the culture of sharing information among the current leadership. What concerns, experiences, or emotions are leaders bringing to the table that negatively or positively affect their ability to be transparent?

#### 3. Develop membership renewal messages and materials to increase pledges over time.

Are you satisfied with your membership's response to last year's renewal process? What choices did you make about messaging that year? Did you ask for a pledge increase? Why or why not?

Of the three renewal processes detailed in this report, which might best fit your congregation and why?

Who is involved in creating your membership renewal materials? Should you involve anyone else? Do you have examples of resources from other synagogues that might be helpful as you create and redesign your materials?

## Engagement Questions

### 4. Build a culture of member engagement through quality programming and community relationships.

Does your clergy, staff, and lay leadership regularly engage your members? How do you engage them?

Do members naturally support one another, even outside of their demographic group? How? Provide such examples as social action, intergenerational, and life cycle involvement.

Which of your synagogue's programs and services are a notable draw for members, and which are lacking? What would need to change for these offerings to be more engaging and based on relationships?

## Fundraising Questions

### 5. Prioritize individual connections with members and prospects.

In recent history, has your synagogue's leadership successfully conducted conversations with each household in your membership? If so, what worked with that process, and what was not as successful? What did you talk about, and why?

Reflecting on the size and availability of your membership, what approach to one-on-one member meetings could work best for your congregation?

Consider:

- Who in the lay, professional, or clergy leadership should be involved?
- What time of year would be best for these conversations?
- How often should this kind of campaign be undertaken?

Beyond financial commitments, what other topics would be appropriate to discuss with each household?

### 6. Pay attention to member giving at and above the sustaining level.

What percentage of your membership is giving above the sustaining level? (The suggested level is 10%.)

What percentage of your total voluntary collections derive from these larger gifts? (The suggested level is 35% to 40%.)

What percentage of your membership is giving exactly at the sustaining level? (The suggested level is 20%.)

What steps should your leadership take to improve any of these metrics?

Which targets are achievable for your congregation?

### 7. Recommit to ongoing fundraising.

What does your yearlong fundraising calendar look like? How intentional is your leadership about developing and stewarding this calendar of activities? Do you have clear fundraising targets for each campaign? Are those targets based on the realities of your budget? To what extent have you met prior fundraising goals?

To what extent does your synagogue's culture of fundraising mirror your culture of voluntary commitments?

To what extent do the fundraising messages you employ throughout the year align with the messages you send about membership commitments? To what extent do they align with the congregation's values?

Who is involved in ongoing fundraising? Is it time to identify new fundraising leadership?

## Administrative Questions

### 8. Track and monitor member giving.

Which people and technology systems are involved in tracking your members' donation income?

Who reviews member gifts (both voluntary commitments and year-round donations), and how often is that data reviewed? Is there a modality or system in place to share these results with synagogue leadership?

What kind of fundraising reports do you share with your synagogue's leadership? Do these reports ever lead to any specific action or change? Why or why not?

How easy is it for synagogue leaders to understand the membership's giving trends along the lines of those identified in this report — for example, the percentage of members giving at and above the sustaining level, the average pledges made by newer versus longtime members, and changes in each household giving over time?

### 9. Build a strong administrative backbone.

Who are the individuals currently managing the details of your voluntary commitment system? How skillfully are they executing their duties, and how clearly do they understand those duties? Do these individuals exhibit the respect, confidentiality, and sensitivity needed to discuss and manage member finances? What training or professional development might be needed?

How long have specific lay leaders been involved in the administration of your pledge process? How much longer will they be able to continue those roles? Name other congregants who could be trained to take their place at a specified future time.

What functions have lay leaders managed that might be better served through staff management — for example, bookkeeping and financial reporting?

What functions have staff managed that might be better served through lay management — for example, member follow-up?

## Leadership Questions

### 10. Cultivate new generations of voluntary commitment leadership.

Who initiated the change to voluntary commitments, and are these people still the champions of the system? If so, who else can you identify to rise into leadership?

Name the various roles that your voluntary commitment champions have taken on and their strengths. These volunteers may be lay leaders, clergy, or staff members. Which are essential responsibilities, practices, or competencies that must continue into the future? Is additional coaching or training needed to help new leaders ascend to this task?

## REVISED DIAGNOSTIC READINESS TOOL

Are you ready to adopt the voluntary commitment model? Synagogue finances touch on every aspect of congregational culture, and change can resonate in unexpected ways. Readiness for financial change means seeing the big picture of your synagogue environment and responding to developments thoughtfully and positively. The voluntary commitment model requires engagement, transparency, trust, and a board that is willing to live with some short-term uncertainty.

Our newly updated tool helps synagogue leaders assess their readiness in each of six categories:

**1. Well-Functioning Leadership.** Readiness is marked by strong levels of trust between leaders and congregants, the stability of leadership (though not in all spheres; for example, lay leadership should be stable if clergy leadership is in transition), well-functioning and reflective boards and committees, and the ability of leaders to focus on a dues change without many other pressing matters at hand.

**2. Open and Values-Driven Leadership and Board Culture.** Readiness is marked by a clear understanding of congregational values and how they affect decisions, a commitment to transparent communication with congregants, openness to change, and short-term uncertainty.

**3. Priority of Member Relationships and Engagement.** Readiness is marked by leaders' personal familiarity with the membership; a solid or emerging culture of welcome, connection, and engagement; and member actions that indicate shared ownership and responsibility toward the congregation.

**4. Sound Financial Management and Planning.** Readiness is marked by leaders' data-driven understanding of synagogue finances, solid practices in financial management and planning over three to five years, thorough approaches to tracking and monitoring member giving, and strong dissatisfaction with or abandonment of dues relief or abatement. An urgency to make financial changes may also be important for some synagogues.

**5. Inclusive Financial Culture.** Readiness is marked by excellence of existing practices or a desire to improve financial transparency; acceptance of all members, regardless of gift size; attention to donor acknowledgment; and positive relationships with major synagogue donors.

**6. Voluntary Commitment Alignment.** Readiness is marked by shared assumptions that the existing dues model is not working, a belief that the voluntary model aligns with or is not far afield from existing congregational values, and the availability of sufficient and strong leaders to lead a dues transition.

Want to dig deeper into readiness? Complete this revised Diagnostic Readiness Tool that both simplifies and expands the version published in *Are Voluntary Dues Right for Your Synagogue? A Practical Guide*. The goal of this tool is not to simply provide a yes or no answer to the question of readiness, but rather to discover the specific areas of your synagogue that can be strengthened in readiness to make a dues change. This tool should be completed by individual members of the leadership team before comparing and discussing answers as a larger group. Part of the readiness assessment is some degree of alignment among leaders around these questions.

Not all of your answers need to be “yes” for your synagogue to successfully adopt the voluntary commitment model. If in any one section more than 25% of your answers are negative, it could indicate that the synagogue is moving to voluntary commitment.

Well-Functioning Leadership	Yes	Needs Work	No
Our lay leaders, clergy, and professionals work well together.			
Our lay leaders, clergy, and professionals communicate with one another regularly.			
Our members generally trust our senior or solo rabbi.			
Our members generally trust our lay leaders.			
Our lay leadership has been stable for the past three years, with standard rates of turnover or with a steady stream of incoming leaders to replace outgoing leaders.			
Our board has presidents in position for the next two or more years.			
Our congregation has lay leaders with business and financial expertise to drive a dues change.			
Our board has functioning committees with articulated goals, clearly defined roles, and leaders who communicate regularly with one another and with the board.			
Our board meetings are effective, well organized, and focus on priorities.			
When our board tries new things or takes on major changes, initiatives, or improvements, we have the stamina and follow-through to stick with it.			
Our board does a good job of evaluating our performance and improving the way we govern our congregation.			
Open and Values-Driven Leadership and Board Culture	Yes	Needs Work	No
Our board discussions and decisions are based on synagogue vision and values.			
We strive to align all aspects of our congregation with its vision and values.			
Board members are empowered to contribute ideas, energy, and resources to our board and to our congregation.			
The board, not individuals, make major decisions.			
We have open and honest conversations at our board meetings that result in deeper understandings and appreciation of one another, even when we have differing opinions.			
Our board is willing to try new things, take risks, and make significant changes to benefit the congregation.			
Our board is willing to live with some degree of uncertainty in the short term as we experiment with new directions.			
Our board communicates regularly with the congregation, and board decisions are not a secret.			



<b>Priority of Member Relationships and Engagement</b>	<b>Yes</b>	<b>Needs Work</b>	<b>No</b>
Our board collectively knows a significant percentage of the congregation and has a good sense of why members choose to be a part of our community.			
Our board and our members actively welcome everyone.			
Our board and our members create opportunities to engage one another in personal relationships.			
Our board discusses how we can conduct engaging, relationship-based conversations with our members.			
Our board expresses shared ownership and responsibility for others and for our collective community.			
<b>Sound Financial Management and Planning</b>	<b>Yes</b>	<b>Needs Work</b>	<b>No</b>
Our financial position is relatively stable — that is, we have not experienced a notable decrease in revenue in any of the past five years.			
We keep track of donor giving patterns and donation trends and have a sense of the financial trends in our congregation.			
We believe that roughly 20% of the congregation will commit to giving above the sustaining amount.			
Our leadership will focus on making a thoughtful and thorough dues transition, even if other major changes are planned for the coming years — for example, philanthropic campaigns, renovations or major repairs, or staff or clergy transition.			
<b>Inclusive Financial Culture</b>	<b>Yes</b>	<b>Needs Work</b>	<b>No</b>
We are a financially transparent congregation, which means we talk openly and honestly about money, share our budget with our members, and let our members know what it costs to operate our congregation.			
We trust that members generally are not trying to avoid their financial obligation.			
At our board meetings, we discuss money issues in a positive and open way, not only when we are in financial crisis.			
The leadership understands that our finances are themselves an expression of values, meaning, and relationships, not a fee-for-service transaction.			
We do a good job of thanking and recognizing our members for their financial (and other) contributions.			
We have strong relationships with our donors who contribute larger amounts, and we talk with them constructively about making a dues change.			

Voluntary Commitment Alignment	Yes	Needs Work	No
In general, our board agrees that our current financial dues model is no longer the right one for us.			
We have explored dues and membership models other than voluntary commitment, and voluntary commitment seems to align most with our vision and values.			
Our president and rabbi are on board with considering voluntary commitment.			
We see a great opportunity to engage our members around a new culture of membership and money.			
We are prepared to use other tools, processes, and programs to build member engagement after we have completed our transition to voluntary commitment.			
We are prepared for the voluntary commitment model to strengthen our community's values, but not necessarily our financial position.			
Early in the process, we are prepared to bring large donors and key stakeholders into the conversation of moving to voluntary commitment.			
We have the right leaders committed to being part of a task force or subcommittee to move our congregation to voluntary commitments.			

# Additional Resources

## ***Are Voluntary Dues Right for Your Synagogue? A Practical Guide***

UJA-Federation of New York, 2015

## ***Connected Congregations: From Dues and Membership to Sustaining Communities of Purpose***

UJA-Federation of New York, 2013

## ***Matterness: Aligning Jewish Organizations With Jewish Values***

Allison Fine, ELI Talks, 2015

[www.elitalks.org/matterness-aligning-jewish-organizations-jewish-values](http://www.elitalks.org/matterness-aligning-jewish-organizations-jewish-values)

## ***Matterness: Fearless Leadership for a Social World***

Allison Fine, Legacy Books, 2014

## ***New Membership & Financial Alternatives for the American Synagogue***

Rabbi Kerry M. Olitzky and Rabbi Avi S. Olitzky, Jewish Lights Publishing, 2015.

## ***Pennies for Heaven: The History of American Synagogues and Money***

Rabbi Dan Judson, Brandeis University Press, 2017

### **From the Union for Reform Judaism**

- ***Reimagining Financial Support for Your 21st Century Congregation***

Union for Reform Judaism, 2015

[www.urj.org/sites/default/files/ReimaginingFinancialSupport.pdf](http://www.urj.org/sites/default/files/ReimaginingFinancialSupport.pdf)

- ***Alternatives to the Alternative: Voluntary Dues and Other Variations on a Theme***

Amy Asin, eJewish Philanthropy, 2015

[ejewishphilanthropy.com/alternatives-to-the-alternative-voluntary-dues-and-other-variations-on-a-theme/](http://ejewishphilanthropy.com/alternatives-to-the-alternative-voluntary-dues-and-other-variations-on-a-theme/)

### **From the United Synagogue for Conservative Judaism**

- ***Can Synagogues Live By Dues Alone?***

Barry Mael, Voices of Conservative/Masorti Judaism, 2013

[www.cjvoices.org/article/can-synagogues-live-on-dues-alone/](http://www.cjvoices.org/article/can-synagogues-live-on-dues-alone/)

- ***What Does the Torah Say About Paying Dues?***

Barry Mael, eJewish Philanthropy, 2015

[ejewishphilanthropy.com/what-does-the-torah-say-about-paying-dues/](http://ejewishphilanthropy.com/what-does-the-torah-say-about-paying-dues/)

- ***Dues Model Change Only a Piece of Financial Sustainability Puzzle***

Barry S. Mael, eJewish Philanthropy, 2016

[ejewishphilanthropy.com/dues-model-change-only-a-piece-of-financial-sustainability-puzzle/](http://ejewishphilanthropy.com/dues-model-change-only-a-piece-of-financial-sustainability-puzzle/)

## Stories of Voluntary Commitment Synagogues

- ***Temple Turns to Pledges to Replace Dues*** — Temple Beth Abraham, Tarrytown, NY  
Carter Smith, The Rivertowns Enterprise, 2015  
[/tba-ny.org/wp-content/uploads/2015/08/Temple-turns-to-pledges-to-replace-dues.pdf](http://tba-ny.org/wp-content/uploads/2015/08/Temple-turns-to-pledges-to-replace-dues.pdf)
- ***Relational Judaism: How Building Community Helped Us Change Our Dues Model*** —  
Congregation Beth Tikvah, Columbus, OH  
Dani Robbins, eJewish Philanthropy, 2015  
[ejewishphilanthropy.com/relational-judaism-how-building-community-helped-us-change-our-dues-model/](http://ejewishphilanthropy.com/relational-judaism-how-building-community-helped-us-change-our-dues-model/)

## Additional Articles

- ***Over Dues***  
Emma Jacobs, Tablet, 2015  
[www.tabletmag.com/jewish-life-and-religion/193988/over-dues](http://www.tabletmag.com/jewish-life-and-religion/193988/over-dues)
- ***Alternative Dues Models and the Larger Paradigm Shift in Synagogue Life***  
Robert Evans and Bryan Schwartzman, eJewish Philanthropy, 2015  
[ejewishphilanthropy.com/alternative-dues-models-and-the-larger-paradigm-shift-in-synagogue-life/](http://ejewishphilanthropy.com/alternative-dues-models-and-the-larger-paradigm-shift-in-synagogue-life/)
- ***What We Talk About When We Talk About Voluntary Dues***  
Michael Wasserman, eJewish Philanthropy, 2015  
[/ejewishphilanthropy.com/what-we-talk-about-when-we-talk-about-voluntary-dues/](http://ejewishphilanthropy.com/what-we-talk-about-when-we-talk-about-voluntary-dues/)

# About the Research Team

Research for this report was performed by Partner for Change, a consulting practice that integrates insights from the fields of positive psychology, organization development, community building, and network organizing.

**Lianna Levine Reisner**, the lead partner at Partner for Change, is a collaborative change specialist, dedicated to building thriving organizations and communities. She has served in management, fundraising, and grantmaking roles in the nonprofit and philanthropic sectors. She holds a master's degree from Case Western Reserve University's Weatherhead School of Management in positive organization development and change as well as certificates in emotional intelligence, appreciative inquiry, and organization sustainability.

**Rabbi Dan Judson, Ph.D.**, is associate dean of professional development and placement for the Hebrew College Rabbinical School. He received his doctorate in Jewish history from Brandeis University. Dr. Judson served on the national faculty of the Union of Reform Judaism, where he consulted with synagogues across the country on financial issues affecting congregations. He was a contributor to the first UJA-Federation–commissioned report on voluntary dues.

## Acknowledgments

We thank the many congregational leaders — rabbis, staff, and board officers — representing all of the synagogues we interviewed and surveyed for this report. Some of these leaders have shared their voluntary commitment stories countless times before, so we are grateful that they made additional time with us to discuss their latest news. Moreover, we thank many of our interviewees and their colleagues who manage the books for crunching the financial data for this report.

Thanks are also due to Barry Mael from the United Synagogue for Conservative Judaism, who helped us identify additional voluntary commitment congregations we did not know about previously, to Judy Rattner from the Union for Reform Judaism, to Tresa Grauer from the Reconstructionist Rabbinical College, and to Rabbi Judah Isaacs from the Orthodox Union.

Thank you to Michael Laufer and Bruce Wexler for carefully reading and sharing insights on this report.

# Appendix of Materials

## Case study materials

Temple B'nai Or - volunteer and financial pledge forms ..... 53

Congregation Beth Shalom - pledge form ..... 57

**Mishkan Shalom - Brit HaMishkan Community Covenant letter** ..... 59

## Membership Renewal Forms

Temple Beth-El, Providence, RI - letter and pledge form  
(suggested \$ increase) ..... 60

Congregation Emanu-El B'ne Jeshurun, River Hills,  
WI - Chai Society letter and pledge form (suggested % increase) ..... 63

Temple Brith Achim, King of Prussia, PA - letter only  
(open with suggested minimum)s ..... 65



**Volunteer Pledge Form**

Being part of the Temple B'nai Or *Kehilah* means that you have the freedom and opportunity to pursue and enjoy your interests here with us, as well as a platform to contribute your talents and gifts in ways that enrich both you and your Temple family.

The 2016-17 *Kehilah* Volunteer Pledge Form provides a variety of ways that your family can contribute beyond the Voluntary Financial Commitment. **Please select from one of the three categories to complete your membership renewal.** We welcome you to choose more than one!

**1. Expertise:**

From time to time, TBO finds itself in need of expertise and experience beyond the realm of our small staff. Please check the boxes below if you can make yourself available to counsel or give assistance in the following areas:

- |  |  |
|--|--|
| <input type="checkbox"/> Development (Fundraising, Philanthropy)                         | <input type="checkbox"/> Human Resources/Benefits                  |
| <input type="checkbox"/> Database Development/Management                                 | <input type="checkbox"/> Interior Design/Decorating                |
| <input type="checkbox"/> Web Design/Development  | <input type="checkbox"/> Cooking                                   |
| <input type="checkbox"/> Graphic Design (posters, promotional materials)                 | <input type="checkbox"/> Social Work                               |
| <input type="checkbox"/> Health & Wellness (nutrition, exercise, meditation, yoga, etc.) | <input type="checkbox"/> Library Sciences/Library Skills           |
| <input type="checkbox"/> Legal services  | <input type="checkbox"/> Event Planning                            |
| <input type="checkbox"/> Finance (accounting, investments, etc.)                         | <input type="checkbox"/> Medical Arts (physicians, dentists, etc.) |
| <input type="checkbox"/> Gardening/Landscaping   | <input type="checkbox"/> Music                                     |
| <input type="checkbox"/> Photography   | <input type="checkbox"/> Handiwork (minor repairs, painting, etc.) |
| <input type="checkbox"/> Videography/Editing   | <input type="checkbox"/> Carpentry                                 |
| <input type="checkbox"/> Marketing/Communications  | <input type="checkbox"/> IT/Network Skills                         |
| <input type="checkbox"/> Human Resources/Organizational Development                      | <input type="checkbox"/> Other: _____                              |

Please list any other Community or Charitable Organizations that you are active in. (Rotary club, school boards, boy/girl scouts, Morristown Partnership, etc.)

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## 2. Time:

TBO is grateful for the gift of your time to help with existing initiatives, as there is much to do to ensure a rich experience across our community. Joining a committee, a task force, or helping at a service or event, makes an immediate impact on Temple life.

The current list of committees/task forces are:

- |  |   |
|--|---|
| <input type="checkbox"/> Book Club                         | <input type="checkbox"/> Gallery Committee              |
| <input type="checkbox"/> Marketing Committee               | <input type="checkbox"/> Facilities Rental Committee    |
| <input type="checkbox"/> Membership Committee              | <input type="checkbox"/> Torah Repair Task Force        |
| <input type="checkbox"/> HR Committee                      | <input type="checkbox"/> Adult Choir                    |
| <input type="checkbox"/> Events Committee                  | <input type="checkbox"/> Office Help                    |
| <input type="checkbox"/> Fundraising Committee             | <input type="checkbox"/> Break the Fast                 |
| <input type="checkbox"/> Worship Committee                 | <input type="checkbox"/> High Holy Days Usher/Volunteer |
| <input type="checkbox"/> House & Grounds Committee         | <input type="checkbox"/> Train to lead a Shiva Minyan   |
| <input type="checkbox"/> Religious School Committee        | <input type="checkbox"/> Mulch the Parking Lot          |
| <input type="checkbox"/> Social Action Committee           | <input type="checkbox"/> Sisterhood Board               |
| <input type="checkbox"/> Endowment Committee               | <input type="checkbox"/> Men's Club Board               |
| <input type="checkbox"/> Donor Recognition Task Force      | <input type="checkbox"/> Nominating Committee           |
| <input type="checkbox"/> Finance Committee                 | <input type="checkbox"/> What did we miss?              |
| <input type="checkbox"/> High Holy Days Committee          |   |
| <input type="checkbox"/> Lifelong Learning Committee       |   |
| <input type="checkbox"/> Annual Technology Task Force      |   |
| <input type="checkbox"/> Vendor Contract Review Task Force |   |
| <input type="checkbox"/> Caring Community                  |   |
| <input type="checkbox"/> Soup Kitchen Committee            |   |
| <input type="checkbox"/> Community Captains                |   |
- 

When are you most likely to be available to volunteer? Check all that apply.

- Day
- Evening
- Weekend
- Weekday



### 3. Resources:

If you find volunteering through time or expertise difficult, we also welcome additional gifts of the heart to support important Temple improvements and initiatives. Consider a donation to the following:

- Building Fund: Assist with needed capital repairs to our facility
- Security Fund
- Music Programs: Enable Cantor Galit to enhance services, programming, and concerts
- Sanctuary Improvement
- General Operating Fund
- Other: \_\_\_\_\_

*Thank you for your support and ongoing commitment to the TBO Kehilah!*



**Kehilah Membership Program  
Voluntary Financial Commitment Pledge Card  
July 1, 2016-June 30, 2017**

Name \_\_\_\_\_

This year's Sustaining Membership level was determined from operating expenses of \$1.27M shared amongst a current census of 465 members. Your support ensures the health and vibrancy of our *Kehilah*. ***Todah Rabah!***

<b>Sustaining Membership</b>	
_____ Sustaining Level Donation	\$2,760 (\$1,380 per adult member)

<b>Higher Levels of Giving</b>	
_____ <i>Amudim</i> /Pillars Level Donation	\$10,000
_____ <i>Shomrim</i> /Guardians Level Donation	\$7,000
_____ <i>Manhigim</i> /Leaders Level Donation	\$4,000

<b>Other Pledge:</b>
\$ _____

All members who pledge more than the Sustaining level -OR- more than last year's pledge will be recognized as *Bonim*/Builder Members

**Please also renew my membership in:**

- |                      |      |
|----------------------|------|
| _____ WRJ/Sisterhood | \$36 |
| _____ TBO Men's Club | \$36 |
| _____ ARZA           | \$50 |

**Please select a payment schedule.**

- |  |  |
|--|--|
| _____ <b>Annual</b> (one payment, July)  | _____ <b>Quarterly</b> (July, Sept, Dec, March)  |
| _____ <b>Semi-annual</b> (July/December) | _____ <b>Monthly</b> (10 payments, ending April, Autopayment via credit card/ACH only) |

**Please take a moment to let us know if your information has changed.**

Name: \_\_\_\_\_  
 Mobile Phone: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 Home Address: \_\_\_\_\_

**2016 – 2017**  
*Renewing Member Voluntary Membership Pledge  
 and School Fees*

**Congregant Family:** «Last\_Name\_First\_Name»

**Years Affiliated with CBS:** \_\_\_\_\_

Check here if your contact or family information has changed. Please notify the office using the CBS Family Changes form available from the office.

**Step 1: Select your annual membership pledge**

Your membership pledge commitment last fiscal year (not including school fees) was «Membership\_Pledges». Would you consider pledging «Pledge\_Incr\_20» for the upcoming year? Please note that the *sustaining amount* required to fund CBS's activities for the new fiscal year requires an estimated average membership pledge of \$1,000.

<b>Founder*</b> \$7,200 <input type="checkbox"/> (\$600/mo)	<b>Benefactor*</b> \$4,200 <input type="checkbox"/> (\$350/mo)	<b>Mensch*</b> \$3,000 <input type="checkbox"/> (\$250/mo)	<b>Provider*</b> \$2,000 <input type="checkbox"/> (\$167/mo)	<b>Supporter*</b> \$1,200 <input type="checkbox"/> (\$100/mo)	<b>Chai*</b> \$600 <input type="checkbox"/> (\$50/mo)	<b>Suggested/other</b> «Pledge_Incr_20» <input type="checkbox"/>
--	---	---	---	--	--	--

\* Eligible for family High Holy Day tickets.

**Step 2: Total FY 2016 Commitment with School Fees**

Total Membership Pledge Commitment Selected from Step 1	<b>\$</b>
Total from Religious School Registration Report (currently enrolled students – registration report)	«Tot_Rel_School»
Total from New Religious School Enrollment forms (newly enrolled students)	<b>\$</b>
Donation to CBS's Scholarship Fund – help fund religious education for deserving children	<b>\$</b>
Total FY 2016 Commitment – enter here and in the highlighted space in Step 4	<b>\$</b>

**Step 3: Register for your auxiliaries (with separate checks)**

Auxiliary	# to Register	\$Amount	\$Total
Sisterhood (Separate check payable to CBS Sisterhood)		<b>\$ 36.00</b>	
Men's Club (Separate check payable to CBS Men's Club)		<b>\$ 36.00</b>	
USY/Kadima (Separate check payable to CBS USY)		<b>\$ 75.00/\$70.00/50.00*</b>	

\*USY: first child at \$75 and additional children at \$70 each. Kadimia: \$50 each. Please list children's name below and indicate USY or Kadima

Membership related forms are available at <http://www.cbs-sev.org/about-us/membership> and <http://www.cbs-sev.org/inside-cbs>.

Your current statement as of April 30, 2016 is enclosed. Kindly arrange to settle any balances prior to May 31, 2016.

*Did you know... that CBS's scrip program is easy to use and equally benefits you and CBS?  
 Visit the CBS website, or ask Robin Ceppi!*

Continued on Reverse Side



2016 – 2017
Renewing Member Voluntary Membership Pledge
and School Fees

Step 4: Select Your Payment Plan – all financial commitments are due in full by May 31, 2017

- My check payable to Congregation Beth Shalom for the full selected amount is enclosed.
Charge my Visa or MasterCard designated below for the full amount selected.
Charge 50% to my credit card shown below now and the balance on December 15, 2016.
Design Your Own Contribution Plan (below) – Must be paid in full by May 31, 2017

Down Payment: \$ \_\_\_\_\_ by [ ]check or [ ]charge the credit card designated below.
Charge the remaining balance of \$ \_\_\_\_\_ to my credit card designated below by \$ \_\_\_\_\_
per month for \_\_\_\_\_ months. Total fiscal year commitment is \$ \_\_\_\_\_ (from Step 2).

Credit Card: Type MC/Visa Card Number: \_\_\_\_\_ Exp: \_\_\_\_\_

Authorizing Signature: \_\_\_\_\_

Step 5 – Personally Identifiable Information (PII)

CBS publishes an annual membership roster that includes members' contact information and childrens' names. All such information will be included in this roster unless you provide opt out instructions on the enclosed form.

- Please check this box if you elect to provide the PII opt out instruction form.

Step 6 – Sign Your Pledge

Congregant Pledge

I/We understand that:

- Based upon our pledge and the pledges of other congregants, CBS has made commitments to clergy, administrative staff, teachers and others necessary to our synagogue's operations and religious school.
I/We have selected the payment plan selected above.
My/Our obligations will be current and any special fees paid prior to any simcha (wedding, B'nai Mitzvah, baby naming) provided by CBS.
Due to the nature of CBS's voluntary pledge structure the Board of Trustees reserves the right to request or assess further financial support from its members in the event of a revenue shortfall.

Name & Signature / Date

Name & Signature / Date



## **Brit HaMishkan: Community Covenant**

*"And Adonai spoke to Moses, saying: 'Speak to the Israelites that they may take for me a contribution; from everyone whose heart so moves him, take my contribution... and let them make me a sanctuary, that I may dwell among them'" (Exodus 25:1–2,8).*

Becoming a member of Mishkan Shalom is entering a sacred covenant to build and sustain a community of shared values so that we may find godliness in our midst. This year we are making formal what is already the tradition at Mishkan Shalom: that all members participate in building of our communal ties.

We are asking all members to undertake two of our most basic tasks – greeting and feeding one another when we gather. Member households will be expected to:

- Serve as a greeter at one service annually
- Host either a Potluck Dinner or Kiddush after services on Friday evening or Saturday.

When you re/join Mishkan this year, your welcome letter will include instructions on how this commitment process will work.

Members who join **before the High Holidays will select their own date** for convenience as well as to give you an opportunity to use your hosting to commemorate a special event/date in the life of your family. Members who join **after the High Holidays will be assigned dates**, with the option of switching dates as needed/available.

Detailed instructions are located on a scheduling website, and someone from the Membership/Community Team will reach out to you prior to dates of service. For member households for whom hosting would present a financial burden, Mishkan Shalom will have basic foods and drinks available but still require each household to commit to a date for set-up and clean-up..

In addition to your support in welcoming and nourishing our community in these concrete ways, if we are to thrive as a community, we will also need your help to fill the roles which bring dynamic programming and services to our community. Through our newsletter and website, we offer updated information about the many committees/teams/groups/events that offer opportunities for involvement. There is no better way to get to know each other than coming together in service. We will help you bring your own special gifts to our Mishkan.



# TEMPLE BETH-EL

*Congregation Sons of Israel and David*

December 2016

«Family\_Formal\_Mailing\_Label»

«Family\_Address»

«Family\_City\_State\_Zip\_Code»

Dear «Family\_Informal\_Salutation»,

Every year at this time, our Temple staff, Budget Committee and Board of Trustees grapple with maintaining a fair, inclusive funding structure that is respectful and sensitive to members, while ensuring the Temple's long-term financial strength so that it may fulfill its sacred vision and mission. We view all members – regardless of annual giving levels – as people we care about and value as we strengthen our synagogue through deep, meaningful relationships within the Temple Beth-El community.

Our Board strives to set the lowest annual support levels possible while protecting the Temple's financial sustainability. For the fiscal year beginning June 1, 2017, Trustees judiciously projected both revenues and expenses and set annual basic membership support at \$2,135. This represents an increase of just \$40, or two percent more than the prior year's basic membership dues.

We continue to exercise prudent management of our revenue and operating expenses. For more than a decade now, we have projected and implemented balanced budgets. Our budget will be a little over two million dollars, of which a little over one million dollars comes from the annual support of our members. And, while our membership is stable and even growing at nearly 800 member households, many of our congregants find it financially difficult to support the synagogue at the base level of \$2,135. We are very thankful that 149 members have joined our Premium Support levels; their enhanced annual giving allows us to continue to sustain individuals and families who seek financial assistance. We are most fortunate that Temple Beth-El has been able to draw income from our endowment, several trusts and earmarked funds, which enables us to launch initiatives and make capital improvements that would otherwise be beyond our operating budget.

Our new annual membership support level is effective for the upcoming fiscal year, beginning June 1, 2017. We are alerting you now because many members like to make year-end charitable contributions and plan their payments for the coming year. We have enclosed a form and a return envelope with the annual support commitment you made for the fiscal year 2016-2017 and a place for you to enter your annual commitment for 2017-2018. We hope that during the coming fiscal year you will be able to increase your support by at least the recommended \$40. However, we continue to adhere to a Temple Beth-El guiding principle to welcome and value all members, regardless of their ability to pay the full annual support.

Please complete the enclosed confidential form and return it to Executive Director Judy Moseley.

We are available to answer any additional questions you may have about this or any Temple Beth-El issue. Please contact Judy Moseley at (401) 331-6070, ext. 105 or [jmoseley@temple-beth-el.org](mailto:jmoseley@temple-beth-el.org) or me at (401) 489-1617 or [president@temple-beth-el.org](mailto:president@temple-beth-el.org). You also may reach out to synagogue leaders you know.

We do not take your continued support for granted. We sincerely appreciate it. Thanks to you, our clergy, staff and volunteers, our beloved Temple Beth-El remains strong and vibrant.

With warmest regards and a good 2017.

A handwritten signature in black ink, appearing to read 'R. Stolzman', with a long horizontal stroke extending to the right.

Robert I. Stolzman, Temple Beth-El President



**Annual Membership Support Pledge  
for the Year of June 1, 2017 to May 31, 2018**

To:

- \* In order to maintain the Temple's financial strength, TBE asks each household for a basic annual membership support of \$2,095. However, any level of support will be accepted. *New members are eligible for an incremental scaling of support.*
- \* For those who are able to, please consider joining the Premium Support Program. This program ensures that our Temple can continue to welcome and serve families and individuals who cannot afford basic annual support.
- \* School Tuition - Religious School tuition for Pre-school thru Grade 2 and Grades 8 thru 10 is \$580, tuition for Grades 3 thru 6 is \$970 and Grades 11 & 12 tuition is \$125, No child will ever be turned away because of a financial hardship.
- \* Every member, regardless of their level of annual support, is critically important to maintaining the vitality of our Temple community.
- \* Please be assured that your pledge is strictly confidential.
- \* *If you have recurring payments you must renew each year by filling this form out.*
- \* If you have any questions about your TBE membership support pledge, please contact Judy Moseley, Executive Director at 401-331-6070 or [jmoseley@temple-beth-el.org](mailto:jmoseley@temple-beth-el.org).

For the 2016-2017 fiscal year your membership commitment was: \_\_\_\_\_

**2017-2018 Membership Support Pledge**

*(Please check one of the following)*

Annual Support - \$2135

Other: \_\_\_\_\_ *Please consider a minimum increase of at least \$40 over your last year's commitment.*

**Premium Support Levels:**

Sustainer's Circle - \$2,500+

Rabbi's Circle - \$5,000+

President's Circle - \$2,900+

Guardians - \$10,000+

Chai Circle - \$3,600+

Pillars - \$18,000+

Signature \_\_\_\_\_ Date: \_\_\_\_\_

**PAYMENT PLAN *(Please check one of the following)***

How often payments are to be made:  Lump sum  Quarterly Payment Plan  Monthly Payment Plan

I/We would like to pay with:  Personal checks  Charge card  Automatic payment to charge card

Other form of payment (how) \_\_\_\_\_

Credit Card Authorization: Card Holder Name: \_\_\_\_\_

Address: \_\_\_\_\_

Check one:  VISA  MC  AMEX  Discover

Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Please bill my card one time only in the amount of: \$ \_\_\_\_\_

Cardholder Signature \_\_\_\_\_ Date \_\_\_\_\_



*Rabbi*

Marc E. Berkson  
The Allan H. and Suzanne L. Selig  
Rabbinic Chair

May 19, 2016  
11 Iyyar 5776

*Cantor*

David M. Barash

«Display\_Name»

*Rabbi-Director of Lifelong Learning*

Toba L. Schaller

«Address\_1»

«City», «State» «Zip»

*Rabbi Emeritus*

Francis Barry Silberg, PhD, DD

Dear «Display\_Name»,

*Interim Executive Director*

Betty Lieberman

As we look forward to the 2016-2017 year, we are writing to request and encourage your generous support of the mission of our congregation for the coming year. The financial support of our members enables us to maintain the high quality of religious, educational, cultural, and social action programming that we provide to you and all of our members, regardless of level of giving.

*Member Services*

Margie Stein

*President*

Michael Levin

We are proud to be a congregation in which members give freely and from the heart. When members ask for guidance on how to determine their annual commitment, we let them know that the current "sustaining amount" per member family – total expenses divided by the number of member families – is \$3,500. Some members are able to commit above that level and others below. What is most important is that your annual commitment is at a level that is meaningful and appropriate to you and your family. **We are truly grateful to members like you who have demonstrated their commitment to CEEBJ with a generous annual pledge.**

*Interim Executive Vice President*

Sandra Kohler Stern

*Vice Presidents*

Andrew Appel  
Amy Kazilsky  
Barbara Levin  
Betty Lieberman  
Sherry Maluon

*Secretary*

Margo Zimmermann

Last year, we introduced our CHAI SOCIETY, with five different levels of enhanced giving as described in the enclosed information sheet. Your commitment for this past year already places you near or in one of the Circles. As you complete the annual commitment form, also enclosed, please consider joining or stepping up to the next Circle of the Chai Society.

*Treasurer*

Michael Grinker

*Immediate Past President*

Bruce A. Keyes

**We ask that you return your completed commitment form for the fiscal year beginning July 1, 2016 to the synagogue office by June 10, 2016.** For your convenience, the amount you pledged last year is shown on the form, together with suggested pledge amounts. If we do not hear from you, we will record your pledge at a 5% increase over your current commitment. If you have any questions, please feel free to reach out to either of us, and we will be happy to help you.

*Board of Trustees*

Mark Holland  
Ruth Kantrowitz  
Hal Karas  
Reenie Kavalor  
Richard Masters  
Dana Michael  
Robert A. Miller  
Tamara Miller  
Todd Richheimer  
Jodi Habtish Sinykin  
Nadine Zuckerman

Thank you for being a vital part of our congregational community and for your very meaningful commitment for the coming year.

L'shalom,



Bruce Keyes  
President



Betty Lieberman  
Interim Executive Director

*President of Temple Brotherhood*

Garrett Butenhoff

*President of Women of Emanu-El*

Ruth Treisman

# Congregation Emanu-El B'ne Jeshurun

## 2016 — 2017 Membership Commitment Form

In support of the mission of the congregation, I am/we are pleased to make a commitment to  
Congregation Emanu-El B'ne Jeshurun

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

My/Our membership commitment in 2015-2016 was \$ \_\_\_\_\_

**This year I/we will increase  
my/our commitment:**

- by 5% to \$ \_\_\_\_\_  
 by 10% to \$ \_\_\_\_\_  
 by 18% to \$ \_\_\_\_\_  
 by 25% to \$ \_\_\_\_\_  
 Other: \$ \_\_\_\_\_

Please consider a commitment that  
places you in our Chai Society at one of  
the following levels of giving:

Circle of Strength	\$3,600 - \$5,399
Circle of Valor	\$5,400 - \$7,199
Circle of Devotion	\$7,200 - \$9,999
Circle of Virtue	\$10,000 - \$17,999
Circle of Honor	\$18,000 and above

Phone \_\_\_\_\_ Email \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Preferred Payment Schedule:**

- Monthly (10 payments, August – May)     Quarterly (July, October, January & April)  
 Semi-annually (July & January)         Annually (July)

**Preferred Payment Method:**

- Check or credit card number submitted each time a statement is mailed  
 Credit card automatically charged according to preferred payment schedule

Visa or MasterCard #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Signature: \_\_\_\_\_

- Automatic debit from checking account according to preferred payment schedule

Please return this form with your signature and a voided check.

Signature: \_\_\_\_\_

- CEEBJ is already included in my estate plan.  
 I/We would like information about the Create a Jewish Legacy program.



Dear Fellow Congregant,

It is once again time for Temple Brith Achim's annual membership renewal. We value you as an integral part of our congregation and hope that belonging to the TBA community is a meaningful and enriching experience for you.

To ensure support for the mission of our community – learning, worship, and building connections – TBA follows the teaching of the Torah (Exodus 25:2), in which we are told, "You shall accept gifts for Me from every person whose heart so moves him [or her]." In this way, every household contributes financially, according to our hearts and means, and every household participates equally in the benefits of community. Every gift is meaningful, and every gift is needed.

In this spirit, each year we ask our congregants to make a **Gift of the Heart** (your pledge of financial support, according to your heart and means) and a **Gift of the Hand** (your pledge of volunteer support, according to your skills, interests, and time). Together, your Gifts of the Heart and Hand keep TBA the strong and vibrant community we know it to be. Our sustainability and health depend on both.

Your level of financial commitment is determined by you, and is strictly confidential. Financial ability is never a barrier to belonging.

As you determine your *Gift of the Heart*, please consider the following:

- ✧ In order to maintain our fiscal health, Temple Brith Achim asks each household to contribute an annual Gift of the Heart of **\$2,600**.
- ✧ We ask households unable to commit to \$2,600 to consider a minimum Gift of the Heart of \$1,800, and more, if possible.
- ✧ Knowing that many of our member households cannot contribute the requested amounts, we ask that households who are able, consider a larger gift. For example:
  - \* Become an **Ozer (Helper) Member** by pledging **\$5,000** or more for the year.
  - \* Become a **Maccabee** by committing to a pledge of **\$5,000** in addition to your Gift of the Heart, each year, for a period of 3 years.
  - \* Contribute to the **Tuition Scholarship Fund** (see table at the end of this letter)

As you determine your *Gift of the Hand*, please remember that TBA has a very small staff, and a large portion of what we do is done by our member volunteers. There really is no "they" in TBA. There is only "us" and "we." If you need help finding a place to contribute your time and talents, please contact me at [hsinel@comcast.net](mailto:hsinel@comcast.net). I will be happy to put you in touch with others who will welcome you into meaningful and much needed service.

We encourage you to complete your renewal online, beginning June 5<sup>th</sup>, at [renewal.brithachim.org](http://renewal.brithachim.org). If you prefer, you can return the enclosed forms to the temple office. Either way, we ask that you complete your renewal **by July 1<sup>st</sup>**, so that we know we can count on you, as we prepare for the start of the upcoming new year at TBA.

**High Holy Day Admission cards will be sent to you after the office receives your renewal information and first payment.**

Please also review your family information as it appears on the enclosed "Family Profile" report and the "Student Data Form". Make any changes that are needed and either return the form(s) to the temple office, or email Cindy Poust ([cpoust@brithachim.org](mailto:cpoust@brithachim.org)) with your corrections.

TEMPLE BRITH ACHIM



481 South Gulph Road  
King of Prussia, PA 19406  
www.brithachim.org

Rabbi Eric J. Lazar  
(610) 337-2222  
(610) 337-5822 Fax  
e-mail: [rabbi@brithachim.org](mailto:rabbi@brithachim.org)

Sharon Forman-Gill  
Director, Lifelong Jewish Learning  
(610) 337-2820  
e-mail: [sharon@gill@brithachim.org](mailto:sharon@gill@brithachim.org)

Thank you for reaffirming your ongoing commitment to our TBA community. It is better and stronger because you are a part of it. I look forward to seeing you at the temple soon.

Kol Tuv,

Heidi Rosenau-Sinel

President, Temple Brith Achim  
[president@brithachim.org](mailto:president@brithachim.org)  
610-337-2222 x 307 (TBA)  
610-715-5607 (Cell)

### Powell Religious School Tuition Scholarship Fund 2016-17

*"What stabilizes the world? The voice of children who study Torah." - Zohar, li, 255b*

Below are the levels of scholarship donation:

Category	Amount
Friend	\$18
Helper	\$36
Builder	\$54
Sponsor Bronze      ¼ tuition Sun or Wed only	\$200
Sponsor Gold        ½ tuition Sun or Wed only	\$430
Sponsor Platinum    ½ tuition Sun and Wed	\$600
Platinum Sponsorship	\$1,800
Other	\$ _____

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Eric S. Goldstein

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David L. Moore\*

## **Chair, UJA Women**

Judith K. Baum\*

## **Chair, Planned Giving & Endowments**

Gary Claar\*

## **General Planning Chair**

Jonathan Plutzik\*

## **Chair, Caring Department**

Karen S.W. Friedman\*

## **Chair, Jewish Communal Network Department**

Brett H. Barth\*

## **Chairs, Jewish Life Department**

Amy A.B. Bressman\*

Roni Rubenstein\*

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Martine Fleishman\*

Jonathon C. Held\*

Barry A. Kaplan\*

Suzanne F. Peck\*

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## **Executive Vice President**

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Mark D. Medin

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### **Planning Director**

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#### **Long Island**

Elisa Blank

#### **Manhattan**

Eliane Dreyfuss

#### **Riverdale and Westchester**

Andi Rosenthal

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Rebecca Missel

### **Planning Coordinator**

Sarah Ecton

### **Senior Planning Assistant**

Desiree Neissani

### **Planning Assistant**

Sarah Struhl

\*Executive Committee member

\*\*deceased

# Notes





[ujafedny.org](http://ujafedny.org)



[@ujafedny](https://www.instagram.com/ujafedny)

UJA-Federation of New York cares for Jews everywhere and New Yorkers of all backgrounds, responds to crises close to home and far away, and shapes our Jewish future.