

Strengthening Congregations

Reimagining Financial

Support for your 21st

Century Congregation

A Report from the 2013–2015 Community of Practice



UNION *for*
REFORM JUDAISM
האיחוד ליהדות רפורמית

AN INTERACTIVE RESOURCE

Is Your Community Looking to...



- ☒ Understand the relationship between membership engagement and financial support?
- ☒ Create a meaningful financial model that reflects the vision and values of your community?
- ☒ Improve transparency and communication around congregational finances?
- ☒ Learn from congregations who have already experimented with different models as well as from experts in the field?



If you answered **YES!**
to any of these questions—then
***Strengthening Congregations:
Reimagining Financial Support
for your 21st Century
Congregation*** is the resource
for you!

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Thank you to the congregations that participated in the
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Temple Ner Tamid, Bloomfield, NJ
Temple Sinai, Washington, DC
The Temple Congregation B'nai Jehudah, Overland Park, KS

While the URJ facilitated the Community of Practice and brought congregational leaders together to learn, network and experiment, we also gained significant knowledge from their efforts in their congregations. This resource has been made possible thanks to their hard work, dedication and willingness to share their successes, as well as their challenges, with us.

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Dr. Rob Weinberg, Director of the Experiment in Congregational Education at Hebrew Union College-Jewish Institute of Religion and member of URJ Faculty—an incredible thought partner throughout our work on this Community of Practice and integral in helping us see it through.

Introduction



While clergy, professional staff, and lay leaders work hard to ensure that congregational communities are about much more than a monetary transaction, financial support and systems are still a necessary building block of every synagogue community.

The recession of 2008–2009 brought into sharper focus other demographic trends that have slowly been impacting how synagogues operate: Young adults are getting married and having children later, and affiliation rates are declining across the board. Increasingly, synagogue leaders are exploring the connection between financial support and member engagement, leading them to rethink their financial structures as they strive to strengthen their members' involvement.

As your community thinks carefully about the role finances play in the sacred work of your congregation, this document can be a resource to help you consider the various aspects of this issue. This report shares information gleaned from the Union for Reform Judaism's Community of Practice, "Reimagining Financial Support for your 21st Century Congregation" (a 24-month guided learning program), and the corresponding Active Learning Network (a 16-week online learning project), implemented in early 2014.

This guide contains several types of resources, each of which provides effective tools for change. Choose what works best for your congregation.

1. The first section lists ten Best Principles for Reimagining Financial Support in your congregation. Best principles are fundamental elements that one must consider when creating a new initiative or adapting one that exists. They are concepts forged from experience, which together form a framework around which to design any new program. This is not to be confused with best practices. Too often a program is considered a best *practice* and it is assumed that, if you replicate the program, you too will garner success in your congregation/institution. Yet every congregation is different, and what works in one congregation may not meet another congregation's needs. Still, the underlying considerations, or principles, apply across congregations. We advise that you view the best principles and treat them as the tenets that undergird a program, regardless of what you might want to implement.

If at this point all you are looking for is to get a general sense of what are the best principles in the area of reimagining financial support—read the [Best Principles](#) section, and perhaps browse through the rest of this document.

If you are looking for ways to be inspired to take action in your congregation and get an expanded view on the topic—start with the [Best Principles](#), and then continue reading the following sections thoroughly.

2. Following the Best Principles section are several resources from the URJ's Reimagining Financial Support Active Learning Network (ALN). [The Introduction and Overview](#) explains how the learning was structured. The [syllabus](#) and [workbook](#) that follow were provided to congregations that participated in the ALN.
3. The ALN Syllabus is divided into units. Each unit focuses on a specific topic and was taught by an expert in that field. Most units of the syllabus include links to webinars, articles and videos the instructors provided for the unit. There also are links to workbook pages for synagogue leadership teams to further study the topic together.

To make the best use of these resources, we recommend creating a taskforce or a committee. Watch the recorded session in each unit, study the additional resources in the syllabus and follow this with a discussion based upon the workbook pages for that particular unit. Each section can certainly stand alone, however, when used together, they can provide a deeper and richer understanding of reimagining financial support in general, and more specifically—how it fits into the unique culture of your congregation.

For additional assistance please contact the URJ Knowledge Network at 1.855.URJ.1800 or email urj1800@urj.org.

We hope this workbook is the start of much thought, conversation, and experimentation in your congregation, and we wish you great success in anything you decide to try! We hope to continue to learn from you and your experiences. Should you utilize this guidebook in your congregation, please send your feedback to the URJ Knowledge Network at the contact information above.

Reimagining Financial Support: Best Principles



Based on the experiences of congregations in the URJ's Community of Practice on Reimagining Financial Support for Your 21st Century Congregation along with learning from a variety of experts who shared their knowledge with the group, we have identified the best principles that any congregation should consider when reimagining financial support (and engagement):

- Engagement First
- Align Your Financial Model with Your Congregation's Vision and Values
- Know the Culture, Find the Mix
- People Appreciate (and Expect) Choice
- Removing Barriers is a Good First Step
- Recognize Distinct Segments of Your Population
- Increase Financial Transparency
- Align Your Language And Communications with your Vision, Too
- Measure and Track Your Results
- Keep the Board on Board

Engagement First

No matter what dues or financial support model your congregation chooses to adopt, it is wise to work on engaging your members first. The current dues model was successful when members felt more of a sense of obligation to belong to a synagogue. Today, few people feel obligated to pay synagogue dues, and young people in particular are less likely to “join” anything. They may actively engage with causes they care about and activities they enjoy, but they don't want to have to join to do that.

Reconsidering financial support leads many congregations to ask questions about what “membership” means. For established congregations, the traditional notion of membership is closely tied to money—if you pay dues, you are a member. But starting the conversation about belonging to or becoming part of a community with financial commitment feels uncomfortable and off-putting to many and—for the increasing numbers of members of Jewish households who have not grown up Jewish—feels quite foreign.

Engagement goes hand in hand with financial support. If people in the community feel engaged—with Judaism and with the congregational community—won't they be willing to make or increase their financial commitment? Taking this question seriously has led a number of congregations to gather feedback through surveys, interviews, and focus groups about feelings of engagement and connection with the congregation, with clergy and professionals, with other congregants, and with Jewish life. If the broader membership feels well connected, a change to a financial support system predicated on choice (see below) is more likely to succeed than if they feel disconnected. If your congregational community is vibrant and people feel well connected and engaged, they may be open to a variety of options to support that engagement financially. High engagement gives you the latitude to experiment and reason to believe that, given the opportunity, members will want to support the community.

It is also possible that if the current financial support model—or some aspect of it—alienates congregants, changing it may be prerequisite to improving engagement. For example, this logic has led a number of congregations to simplify or eliminate their dues abatement process; they report having attracted or retained members as a result.

Align Your Financial Model with Your Congregation's Vision and Values

Congregations seek to redesign their financial support systems for a variety of reasons. You can find an expanded discussion of these reasons in a recent report titled, “Are Voluntary Dues Right for Your Synagogue?” published by UJA-Federation of New York’s [SYNERGY](#) group. Some are purely financial; they find that the current system is not doing a good job of generating the revenue necessary to sustain the congregation and are convinced there must be a better way. Others are focused on the effects of their current system on member engagement and want to remove those barriers or even enhance engagement (see above). Still others are focused on bringing the way they garner financial support into greater alignment with their cultural values and with values from Torah.

Some congregations are fine with fixed dues because they believe that, within reason, people should believe that everyone pays the same for what they get. Other congregations believe in moving to an income based fair-share dues system because it bases dues on an approximation of ability to pay. This fits their values. Some believe that such a mode can encourage people to game the system and thereby engender distrust rather than honoring each person’s contribution. They would prefer to adopt a system that acts on assumptions of trust. Others draw on the story in Torah in which God asks the Israelites to bring gifts of the heart to help build the *mishkan* (tabernacle). Still others believe that synagogue dues, akin to health club dues, put the member in the position of a consumer looking for a direct correspondence between what they pay and what they “get” from their membership. They prefer to build a system on a covenantal partnership among members who are continually building a spiritual community together. Each of these is a statement of values, and congregational leaders need to take into consideration their own values when thinking about what dues system to implement.

Whether you make a fundamental shift or more gradual or modest changes to your financial system, the challenge to all is to check what implicit or explicit messages your current model may be sending that are contrary to your congregation’s core values. If you find the two are not aligned, you have additional motivation for change and an additional and important yardstick against which to measure options that you consider.

Know the Culture, Find the Mix

Once you have identified a type of financial support system that you believe aligns well with your congregation’s values and the relationship it wants to create with its members, you’ll face a number of decisions specifically about how to design and implement that structure. Knowing the culture of your congregation is critical at this stage, too, as you plan to initiate a change to the financial support structure and particularly as you determine what will be the best combination of dues, fees, and philanthropy for your congregation. Organizational culture refers to the beliefs, values, and often unspoken assumptions that underlie “the way we do things around here.” These assumptions are taken for granted by everyone except newcomers and often go unrecognized, that is until you try to change things in a way that congregants consider counter to those assumptions. Decisions about dues, fees, and philanthropy touch on people’s beliefs about how things “ought” to be paid for. They raise issues of perceived fairness. A congregation with primarily a fee-for-service philosophy will choose a very different mix of dues, fees, and philanthropy than one with a from-each-according-to-his/her-ability mentality.

One URJ congregation, Congregation Beth Am in Los Altos Hills, CA, a fair share congregation, did some analysis and discovered that they had very few congregants under the age of 36—no more than a handful. The leadership believed that a perceived or real financial barrier was keeping them out, and they believed that millennials could be open to joining, so they introduced and implemented a new idea: People 36 years old and under can now join the congregation for \$36 per year, through the “36/36” membership program. With a reduced cost, Beth Am has seen a significant increase in this demographic, with over 160 members. They also introduced another initiative as a way

to ameliorate the transition to full membership for families bridging from preschool to youth education programs. Through the Aleph Bet program, new member families who enroll their oldest child in Kindergarten get dues included in their school registration for one year.

Another congregation, Temple Shalom in Dallas, TX, wanted to create a policy that reflected their commitment to Jewish education and the commandment to “teach them diligently to your children.” They decided to do away with tuition fees for religious school. Although there is still a \$180 registration fee, the general expense of running the religious school has been absorbed into the budget of the congregation. In so doing, Temple Shalom made the education of the congregation’s children the responsibility of the whole congregation, not just the families participating. Similarly, Temple Shalom of New Milford, CT, recently implemented a voluntary commitment model which they are calling “Conscientious Contribution.” As part of this shift, the leadership recognized that lifelong learning is a value shared by the entire community and is available to all, regardless of age. Therefore, they too decided to eliminate tuition fees and support the religious school through the operating budget.

Understanding your congregation’s values and perceptions about fairness, equity, contribution, and what it means to belong is a critical starting point for experimenting with or altering the mix of gifts, fees, dues, or other revenue sources (e.g. from facility rentals or foundation grants) that combine to sustain the congregation’s activities, staff, and infrastructure.

People Appreciate (and Expect) Choice

Most emerging or new models of synagogue financial support involve injecting a modicum of choice rather than dictating dues obligations. In a society where we walk into Starbucks and custom design our own hot beverage or go online and pick the number of doors, features, equipment, engine type, and color of our new car and have it delivered to our local dealer, people increasingly expect more choice in every sphere of life.

In conventional dues models, congregants have less apparent choice than in other models; a set dues amount is dictated by either a standard dues amount for each age or family-status-based category, or a so-called “fair-share” structure based on percent of income. But the reality is that many synagogue members don’t pay the standard dues amount dictated by those structures. It is not atypical to find that one third or more congregants pay less than “standard” dues. Given this reality, a number of congregations have realized that they are operating a de facto choice model, but with the perception of inflexibility of a prescribed dues model.

In response, some congregations have gone to the opposite end of the choice spectrum and shifted their entire system to a voluntary commitment model. The UJA-Federation of New York SYNERGY report highlights 26 synagogues that had previously adopted the model. The synagogues report that often just being given a choice can have positive effects: “Many synagogues reported on members who paid reduced dues through an abatement process, but pledged more when given the opportunity to make a voluntary commitment.”

Other congregations that haven’t adopted the voluntary commitment model have acknowledged that congregants don’t like being told what to do, and they have found ways to introduce choice within modified versions of conventional dues or fair-share models. Examples include specifying a range of dues within a category or softening language of their fair-share request to a “suggested” amount. The next two sections on removing barriers and recognizing distinct segments of your population illustrate other examples.

Removing Barriers is a Good First Step

In any effort to bring about change in a significant aspect of congregational life, it makes sense to begin by harvesting the “low hanging fruit.” Although a comprehensive and thoughtful redesign of the financial support system may be the ultimate goal or result, one good place to start is to identify and remove or lower the immediate barriers to member engagement that your current model presents. When attracting new members, the upfront price of dues and, often, a building fund commitment can discourage prospective members from joining.

Before considering deeper changes to their financial structure, several congregations' first step has involved eliminating (or greatly simplifying) what's commonly called the abatement, adjustment, or dues relief process and committee. Instead, members or prospects seeking to pay less than standard dues now have a one-on-one conversation with the Executive Director or lay leader. There may or may not be a form to fill out, but there are no questions about income, in part because—in the absence of understanding expenses—it's not a good indicator of ability to pay. The conversation is friendly and focuses on the member's engagement with the congregation and what they feel prepared to contribute. This is one place in which congregations can begin to introduce choice within some parameters.

In one such congregation, The Temple Congregation B'nai Jehudah, Overland Park, KS, the Executive Director, Jeanne Adler commented, "The conversation has changed to 'Tell me what you can do. Your membership is important to us.' I don't have conversations where people put their fists on their hips and stand in that posture. It's both small and big—it's huge the way the conversations have shifted." Particularly during the recent recession, several congregations found this approach boosted member retention among those who would rather have left the congregation than go through the traditional abatement process.

The same congregation had sold an urban synagogue building and made its suburban location its permanent home. They realized that the proceeds of the sale made it possible to do away with their customary upfront building fund commitment for new members. This, too, eliminated a major barrier to membership.

Recognize Distinct Segments of Your Population

Even though we often talk about "synagogue members" as if they were a monolithic group, of course they are not. Subsets of the membership population differ along a wide variety of dimensions including age, household make up, background, involvement in various aspects of congregational life, income, geography, and gender, to name a few. As you investigate, experiment with, and design alternative financial support systems, it is important to consider how those systems might affect and be received by various segments of the congregational population. Segmentation is a marketing term referring to the need to divide up a market into groups (segments) that have similar needs and may regard the value of a company's product or service differently from one another. That way the company can approach each segment in a targeted way.

The same can hold true when designing a congregational financial support system and communicating with congregants. The team charged with reimagining financial support at Congregation Shir Hadash in Los Gatos, CA examined a number of different models. In the end, they concluded that dues were not the problem. As one lay leader said, "What is important is how you convey to your congregants the need to support the organization and the value of doing that. [You need to] strike a chord with congregants." They focused really hard on communication in a segmented way; they realized different people needed different messages and could be offered choices within different frames of reference.

To their top donors, who already clearly believed in the value of the congregation, they first expressed appreciation. Then, they reviewed with each such donor their giving history and explained the impact it had had on the congregation. Finally, they offered what they called "Give Once," an opportunity to make a single annual commitment to the congregation (rather than multiple appeals). This resonated with the majority of top donors, and total commitments from that group increased 20% over the previous year.

The second segment consisted of those whose annual commitment was at or near what they called a "Sustain Shir Hadash" amount, an amount arrived at by dividing the congregation's total operating cost by the total number of members. They approached everyone in that group with that request and a number of people whose past commitment were close to that amount increased to the sustaining level. They also targeted a third group with an "Every Dollar Counts" approach that acknowledged that not everyone can contribute the same, but everyone can contribute something; if an amount is meaningful to the congregant, it's meaningful to the congregation.

Segmenting the population enables differentiated structures, expectations, appeals, and recognition for different groups within the congregation's membership. This approach is working for Shir Hadash where they also have significantly increased transparency about financial matters with the congregation.

Increase Financial Transparency

As congregations seek to increase engagement and encourage financial commitment in an age of choice, many are realizing that they need to increase transparency about a congregation's financial condition, its sources, and uses of funds. Making financial matters of the congregation more transparent to everyone in the community helps establish a foundation of trust. It can also lend credibility both to specific requests for support and to the case that leaders make for changing the financial support system.

When congregants know what it actually takes to support the program, staff, and infrastructure of the congregation, they may be more willing to commit to doing their part. This is particularly critical in congregations moving to a "voluntary commitment" model in which the "sustaining" level of commitment is often established by dividing the full operating budget by the number of members. Without budgetary transparency, congregants may feel this level is arbitrarily set.

If synagogue finances are mysterious, people may feel like the money they pay is not really all that important. When the congregational budget and major financial decisions are visible to everyone, congregants gain a much better sense of how their dues or philanthropic gift makes a difference to the health and sustainability of the congregational community. Of course, leaders also have to be prepared to accept greater accountability that transparency can bring. The flip side is that congregants may also bring valuable ideas about financial management that have not previously been considered or may be able to do small things that make a big difference. For example, one congregation communicated to congregants the fact that the synagogue was paying \$25,000 per year in credit card fees. They urged congregants to write a check rather than pay by credit card.

Finally, sharing information more openly about synagogue finances may help create more open attitudes toward change in the financial arena. In one congregation, as part of a general report on the state of the congregation at the annual meeting, the president informed the congregation that outflows from the congregation's coffers exceed inflows. Just sharing that information helped generate a sense that something needed to be done differently and paved the way for experimentation.

Align Your Language And Communications With Your Vision

Words matter. So do images on websites and in brochures. So does the tone and appearance of materials in a "membership packet." Finding the right language and adjusting the way we communicate about money and membership is a critical part of managing the whole process of reimagining the financial support system. Many people who get involved in leading efforts to redesign the financial support system have financial expertise. But introducing, building acceptance of, and implementing a new system requires communication expertise. It is wise to look for the communication and marketing experts in your congregation to help with this part of the effort.

Language matters because it reflects the culture of your congregation and also helps shape that culture for the future. If your efforts are part of trying to shift that culture (e.g. to be more relational), then the language you choose is consequential in the meaning it carries and in what it signals. As you consider your approach to communication, think about your message—what do you want to convey about who you are as a congregation and who you want to become? About intent and values? About what it means to be part of your community? Are you changing all of these messages or just money messages?

Secondly, consider those who will receive your communications. What assumptions are you carrying about your “audience”? Who are they? Who is included? Only current members? Only prospective members? Are they young, old, or in between? Are you targeting a message to high, medium, or low capacity givers?

Financial support is basic—it’s traditionally a big part of how congregants are attached to the congregation. Changing that language significantly may be best done in the context of rethinking how congregants are “attached” to the congregation. Find language that conveys your congregation’s values and intent. Make sure it expresses the purpose and meaning of financial commitments you ask of those in the community. For example, IKAR, an 11-year old community in Los Angeles talks about their relationship with “members” as a b’rit (covenant) only one component of which is financial. By contrast, The Kitchen, a four year old community in San Francisco, offers “subscription levels” in what is explicitly a consumer relationship. Each has chosen language that clearly reflects the relationship they seek to create.

Measure and Track Your Results

One of the biggest fears that synagogue leaders face in modifying or completely overhauling the congregation’s financial support model is that the new system may not work. It may not generate an equal or, preferably, better revenue stream than the previous system did. And, given the close relationship between finances and engagement, leaders want to know whether the hoped-for improvements in engagement materialize if they remove perceived financial barriers and align the model more closely with their congregational and Jewish values.

One way of reducing risk is to be in contact with other congregations that are experimenting. The URJ offers an opportunity to discuss your experiments in The Tent in the Finances group or to be put in contact with congregations that have tried some of the ideas mentioned in this report.

Even taking other congregations’ experiences into account, every model looks different in different communities, bringing with it advantages as well as disadvantages; while solving some problems or achieving some purposes, each model may create some less desirable side effects. That shouldn’t prevent you from moving forward; after all, whatever model you are using now surely has pros and cons, too.

In order to be in a position to address those fears as you implement a new model and to monitor responsibly how it is working (so you can adjust strategy if necessary), it is crucial to implement a well-designed “scorecard” comprising a set of metrics that gauge success along a variety of dimensions. Congregations that are experimenting with or changing their financial support model typically monitor metrics like some or all of the following- before, during, and after such a change (on an ongoing basis):

- Total number of members;
- Member retention (i.e. number of members renewing their membership);
- Indicators of engagement such as those derived from survey results on questions such as likelihood to recommend the congregation to others or tracking indicators such as membership retention at key transition points (e.g. when youngest child becomes Bar/Bat Mitzvah);
- Percent of membership new to the congregation within the last X years;
- Number or percent of new members introduced to the congregation by current members;
- Total revenue from all sources;
- Total revenue by category, i.e. dues or voluntary commitments, fees, fundraising, philanthropic gifts, other sources (such as rents from outside groups);
- Average revenue per member;

- Breakdown of membership by payment level (e.g. percent paying at or close to standard or “suggested” dues or sustaining commitment, percent paying below, percent paying above);
- Number or percent of members paying below the “standard” or “suggested” level who increased their financial commitment in the current year (over the previous year);

All changes, big and small, will lead to some positive results and some negative. Remember that not all negative results mean that you should be going back to the old system. Sometimes the new challenges you face will be more desirable than the old challenges. It takes a strong sense of your objectives and good tracking and measurement to be able to distinguish between results that mean you are moving in the right direction and those that mean you are moving in the wrong direction.

Keep the Board on Board

Congregations often delegate the task of investigating, considering, and proposing financial model changes to a specially formed task force or ad hoc committee. Groups of this sort often assume they should wait until they have a plan fully developed before communicating anything with anyone about their work. The problem is that working away for months in silence creates a vacuum in which people assume something is being kept secret on purpose. This fosters an atmosphere of distrust. From the start, the congregation at large and the board should know that a task force is looking at the issue (without any commitment that anything will change). Sharing information about the task force and its work is part of creating a culture of increased transparency (see above).

Second, as task force members learn about other models and study their own congregation’s financial situation, they may shift their own mindset without bringing others along. They may emerge after months of work with a proposal that makes perfect sense to them but seems radical to members of the board and to congregants in general.

Given how central the financial support model is to the relationship that the congregation forges with members, it’s important to keep the synagogue leadership and members of the board informed as work on this issue progresses. Doing so can help the board progress in its thinking along with the task force members. Even the most cogent, well-thought out proposal can be rejected if it is perceived as a surprise or as going against the agenda of a key leader. Bringing the leaders and congregants along on the journey of reimagining financial support can make the introduction of a new financial support system far smoother and more successful.

Reimagining financial support for your 21st century congregation will not be a simple or direct path. Many congregations have found it helpful to start with simple experiments and gain knowledge, confidence, and support as they move forward. Ultimately, increasing numbers of congregations are finding that a significant change in the financial support system is a critical step forward in strengthening the congregation. The best principles shared above, along with the Active Learning Network materials shared below, are here to share the benefits of others’ experiences and pave the way as you embark on that journey.



INTRODUCTION AND OVERVIEW

Reimagining Financial Support Active Learning Network

Even if your congregation did not participate in the Reimagining Financial Support Active Learning Network (ALN), you can still benefit from reading this document and accessing the resources provided. All of the webinars, chats, learning broadcasts and readings are available on Dropbox and Youtube. Links are provided within the syllabus. If you view each webinar, study the recommended readings and complete the relevant workbook pages—you can learn most of what was offered to our ALN participants.

We hope that this document will help you discover more about financial support for your congregation and will inspire you to take action.

The **Reimagining Financial Support Active Learning Network** (ALN) was a 16 week process that the URJ offered to congregations in spring 2014. The ALN brought together URJ congregational professional and lay leaders who were interested in evaluating the thinking about how they can better align their financial structures with their vision and values, while successfully supporting their congregational needs. Through the ALN process, congregations had the opportunity to learn together, network with others in the field, obtain great tools and resources and identify ‘next steps’ to take action at home!

The ALN process operated in four-week cycles. In the following syllabus, titles of presenters include their positions at the time of the presentation.

Intro Introduction to Reimagining Financial Support and Active Learning Networks

Rabbi Dan Judson, Director of Professional Development and Placement for the Hebrew College Rabbinical School; doctoral candidate in Jewish history at Brandeis University

Jeanne Adler, FTA, Executive Director, Congregation B'nai Jehudah, Overland Park, KS

- [Webinar presentation](#)

Readings:

- [Dan Judson Research for Biennial](#)
- [SYNERGY](#)—UJA Federation of NY: “Connected Congregations: From Dues and Membership to Sustaining Communities of Purpose” by Beth Cousens

Unit 1 Building a Base of Congregational Support

Rabbi Jonah Pesner, Senior Vice President, Union for Reform Judaism

- [Pre-Recorded 20-Minute Learning Broadcast](#)
- [Recorded Live Chat](#)
- [Workbook Pages](#)

Unit 2 Alternative Financial and Membership Models

Rabbi Greg Litcofsky, Temple Emanu-El of West Essex, NJ

Rabbi Valerie Cohen, Beth Israel Congregation, Jackson, MS

- [Recorded webinar](#)
- [Workbook pages](#)

Readings:

- eJewish Philanthropy: “[Should Young Families Have to Pay to Pray](#),” by Adina Kay-Gross
- eJewish Philanthropy: “[Dues are Not the Sole Stumbling Block for Young Families](#),” by Mitchell Shames
- eJewish Philanthropy: “[Can Synagogues Live by Dues Alone](#),” by Barry Mael
- eJewish Philanthropy: “[From Purchase to Partnership: Removing the Price-Tag from Synagogue Membership](#),” by Michael Wasserman
- New Jersey Jewish News: “[Free memberships: Is it Good for the Dues?](#)” by Johanna Ginsberg
- New York Jewish Week: “[Low-Cost Long Island Start-ups Fueling Anger](#),” by Stewart Ain

- Palm Beach Post: “[Jupiter temple tried ‘radical’ no-fees policy as Holy Days begin,](#)” [sic] by Lona O’Connor
- “[Partners with Each Other,](#)” by Rabbi Alan Litwak
- Reform Judaism Magazine: “[When Jews Choose Their Dues](#)”

Unit 3 **Culture and Change with Rabbi Sam Joseph**

Rabbi Sam Joseph, Eleanore Sinsheimer Distinguished Service Professor of Jewish Education & Leadership Development, Hebrew Union College-Jewish Institute of Religion and URJ Faculty Member

- [Pre-Recorded 20-Minute Learning Broadcast](#)
- [Recorded Live Chat](#)
- [Workbook Pages](#)

Unit 4 **Issues Related to Making Changes in Financial Support: Communication, Transparency, Dues Relief, History, Culture, Fear, Lack of Relationships**

Catherine Fischer, Director of Membership and Programming, Congregation Rodeph Shalom, Philadelphia, PA

- [Recorded Webinar](#)
- [Recorded Live Chat](#)
- [Workbook pages](#)

Readings

- The New York Times: “[Friends of a Certain Age,](#)” by Alex Williams
- eJewish Philanthropy: “[Show Them What You’re Working With: How Transparency Leads to Synagogue Sustainability,](#)” by Sacha Litman

Unit 5 **Experimenting & Measuring with Amy Asin**

Amy Asin, Vice President, Strengthening Congregations, Executive Team, URJ

- [Recorded Webinar](#)
- [Workbook Pages](#)

Readings & Videos

- URJ Blog Post: “[When Numbers Aren’t Everything: Defining Qualitative Success,](#)” by Mike Fuld
- NATA Journal: “[Using New Measures to Change the Conversation about Success \(and Your Congregation\),](#)” by Amy Asin
- [Recorded Webinar:](#) Changing the Conversation Towards a Relational Culture

Unit 6 Fundraising and Philanthropy

Rabbi Dovid Eliezrie, North County Chabad Center, Yorba Linda, CA

- [Recorded Webinar](#)

Naomi Levine, Executive Director, and Richard Brown, Visiting Clinical Professor of the George H. Heyman Center for Philanthropy and Fundraising at New York University

- [Recorded Webinar](#)

Unit 7 Being a Networked Congregation

Miriam Brosseau, Engagement & Program Director—ELI Talks, See3 Communications

- [Recorded Webinar](#)
- [Workbook Pages](#)

Readings

- 21st Century Learning: “[The Art of Building Virtual Communities](#),” by Sheryl Nussbaum-Beach
- Recording: “[Networks vs. Communities of Practice](#)” with Sheryl Nussbaum-Beach

ALN Participant Notes Page

Building a Base of Support

Rabbi Jonah Pesner, Senior Vice President, URJ

- **Understanding the role of the leader** in moving a community
- **Creating a “power analysis”**—better understanding who can influence change in an institution
- **Understanding the interests of those with power** & finding ways to expand and deepen relationships with them

Notes

Taskforce Discussion Guide

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Part I: Topic Overview

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Part II: Text Study

Exodus Chapter 18:1-27 Yitro

¹ Jethro priest of Midian, Moses' father-in-law, heard all that God had done for Moses and for Israel God's people, how God had brought Israel out from Egypt.² So Jethro, Moses' father-in-law, took Zipporah, Moses' wife, after she had been sent home,³ and her two sons—of whom one was named Gershom, that is to say, “I have been a stranger in a foreign land”;⁴ and the other was named Eliezer, meaning, “The God of my father was my help, and delivering me from the sword of Pharaoh.”⁵ Jethro, Moses' father-in-law, brought Moses' sons and wife to him in the wilderness, where he was encamped at the mountain of God.⁶ He sent word to Moses, “I, your father-in-law Jethro, am coming to you, with your wife and her two sons.”⁷ Moses went out to meet his father-in-law; he bowed low and kissed him; each asked after the other's welfare, and they went into the tent.

⁸ Moses then recounted to his father-in-law everything that God had done to Pharaoh and to the Egyptians for Israel's sake, all the hardships that had befallen them on the way, and how God had delivered them.⁹ And Jethro rejoiced over all the kindness that God had shown Israel when delivering them from the Egyptians.¹⁰ “Blessed be the Eternal,” Jethro said, “who delivered you from the Egyptians and from Pharaoh, and who delivered the people from under the hand of the Egyptians.”¹¹ Now I know that Adonai is greater than all gods, yes, by the result of their very schemes against [the people].¹² And Jethro, Moses' father-in-law, brought a burnt offering and sacrifices for God; and Aaron came with all the elders of Israel to partake of the meal before God with Moses' father-in-law.

¹³ Next day, Moses sat as magistrate among the people, while the people stood about Moses from morning until evening.¹⁴ But when Moses' father-in-law saw how much he had to do for the people, he said, “What is this thing that you are doing to the people? Why do you act alone, while all the people stand about you from morning until evening?”¹⁵ Moses replied to his father-in-law, “It is because the people come to me to inquire of God.¹⁶ When they have a dispute, it comes before me, and I decide between one person and another, and I make known the laws and teachings of God.”

¹⁷ But Moses' father-in-law said to him, "The thing you are doing is not right;¹⁸ you will surely wear yourself out, and these people as well. For the task is too heavy for you; you cannot do it alone.¹⁹ Now listen to me. I will give you counsel, and God be with you! You represent the people before God: you bring the disputes before God,²⁰ and enjoin upon them the laws and the teachings, and make known to them the way they are to go and the practices they are to follow.²¹ You shall also seek out from among all the people capable men who fear God, trustworthy men who spurn ill-gotten gain. Set these over them as chiefs of thousands, hundreds, fifties, and tens, and²² let them judge the people at all times. Have them bring every major dispute to you, but let them decide every minor dispute themselves. Make it easier for yourself by letting them share the burden with you.²³ If you do this—and God so commands you—you will be able to bear up; and all these people too will go home unwearied."

²⁴ Moses heeded his father-in-law and did just as he had said. ²⁵Moses chose capable men out of all Israel, and appointed them heads over the people—chiefs of thousands, hundreds, fifties, and tens;²⁶ and they judged the people at all times: the difficult matters they would bring to Moses, and all the minor matters they would decide themselves.²⁷ Then Moses bade his father-in-law farewell, and he went his way to his own land.

Discussion questions

- What does Jethro teach Moses?
- Why is Jethro's insight critical to move the community forward?
- Why is Jethro successful in helping Moses grow and become a more effective leader?
- *How can we apply these insights for our own congregational leadership?*

Part III: Central Discussion—Questions to Ponder

- How would you rate your base of support for your initiative?
- To what extent does your base of support extend beyond the usual suspects and those within your target audience that are already involved?
- How would you rate your congregation's awareness about your initiative?
- How would you rate the buy-in of your senior rabbi & temple president?
- How would you rate the buy-in of other critical players?
 - Board Members
 - Donors & Potential Donors
 - Other Key Stakeholders
- In your congregation, how strong is your understanding of where power to make change lies?

Part IV: Next Steps

- Summarize the Discussion.
- What are your next steps?

ALN Participant Notes Page

Alternative Financial and Membership Models

Rabbi Greg Litcofsky, Temple Emanu-El of West Essex, NJ

Moving from “dues” to “an investment” in your Jewish community. How do we move from a fee-for service model to a relational and engaged community?

Notes

Taskforce Discussion Guide

Alternative Financial and Membership Models

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Part I: Topic Overview

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Part II: Text Study—Exodus 35: Parashat Vayak’heil

ד ויאמר משה, אל כל עדת בני ישראל לאמר: זה הדבר, אשר צוה יהוה לאמר.

4 Moses said further to the whole community of Israelites, saying: 'This is what Adonai has commanded:

ח קחו מאתכם תרומה, ליהוה, כל נדיב לבו, יביאה את תרומת יהוה: זהב וכסף, ונחשת.

5 Take from among you gifts to the Eternal; everyone whose heart is so moved shall bring them – gifts for Adonai gold, and silver, and copper;

ו ותכלת וארגמן ותולעת שני, ושש ועזים.

6 blue, purple, and crimson yarns, fine linen, and goats' hair;

י וכל חכם לב, בקם, יבאו ויעשו, את כל אשר צוה יהוה.

10 And let all among you who are skilled come and make all that the Eternal has commanded:

יא את המשכן את אהליו, ואת מכסהו, את קרסיו, ואת קרשיו, את בריחו, את עמדיו ואת אדניו.

11 the Tabernacle, its tent and its covering, its clasps and its planks, its bars, its posts, and its sockets;

יב את הארן ואת בדיו, את הכפרת; ואת, פרכת המסך.

12 the ark and its poles, the cover, and the curtain of the screen;

יט את בגדי השרד, לשרת בקדש: את בגדי הקדש לאהרן הכהן, ואת בגדי בניו לכהן.

19 the service vestments for officiating in the sanctuary, the sacral vestments of Aaron the priest, and the vestments of his sons for priestly service.

כ ויצאו כל עדת בני ישראל, מלפני משה.

20 So the whole community of Israelites left Moses' presence.

כא ויבאו, כל איש אשר נשאו לבו; וכל אשר נדבה רוחו אתו, הביאו את תרומת יהוה למלאכת אהל מועד ולכל עבדתו, ולבגדי הקדש.

21 And everyone who excelled in ability and everyone whose spirit was moved came, bringing to the Eternal an offering for the work of the Tent of Meeting, and for all its service, and for the sacral vestments.

כב ויבאו האנשים, על הנשים; כל נדיב לב, הביאו חח וזנס וטבעת וכומז כל כלי זהב, וכל איש, אשר הניף תנופת זהב ליהוה.

22 Men and women, all whose hearts moved them, all who would make an elevation offering of gold to Adonai came bringing brooches, earrings, rings, and pendants – gold objects of all kinds.

- What is significant about the way in which the Tabernacle (*Mishkan*) was constructed?
- What kinds of gifts are mentioned? Specifically, what are the differences in verses 5 and 10?
- What is most poignant or meaningful to you about this text?
- How does this text relate (or not) to the goals you are trying to achieve in your congregation?

Part III: Central Discussion – Questions to Ponder

- Who are the key stake-holders in your congregation?
- What's the culture of your community when it comes to money?
- How do we lead our communities in a sacred and holy conversation about money and financial support of our temple communities?
- What's your vision for your work? Why is it important?
- What are some alternative membership or dues models you have considered? Why? Which do you think fit best with your congregation's culture?

Part IV: Next Steps

- Summarize the Discussion.
- What are your next steps?

ALN Participant Notes Page

Culture and Change

Rabbi Sam Joseph

Our congregation's culture is the "way we do things around here". Real change happens when those cultural ways are examined and judged as ways for now, ways that need to be changed or ways that should be eliminated. A great challenge is that most of the time the elements of that culture are part of the unconscious behaviors of the members. New people only learn them when they inadvertently violate them. Change requires intentional reflection and evaluation of the unconscious cultural behavioral assumptions by which congregations maintain their culture.

Notes

Taskforce Discussion Guide

Culture and Change

Rabbi Sam Joseph

Part I: Topic Overview

Our congregation's culture is the "way we do things around here". Real change happens when those cultural ways are examined and judged as ways for now, ways that need to be changed or ways that should be eliminated. A great challenge is that most of the time the elements of that culture are part of the unconscious behaviors of the members. New people only learn them when they inadvertently violate them. "That's not how we do it around here." Change requires intentional reflection and evaluation of the unconscious cultural behavioral assumptions by which congregations maintain their culture.

Part II: Text Study

What we want to change we curse and then pick up a tool.
Bless whatever you can with eyes and hands and tongue.
If you can't bless it, get ready to make it new
By Marge Piercy, Poet

- What does Piercy mean in her first line?
- Her second line? Third line?
- How may this apply to what we can do in our congregation?

Part III: Central Discussion—Questions to Ponder

- If a "person from Mars" landed in our congregation, what are examples of important artifacts that this person would see? What do they mean and why are they important?
- What are our congregation's espoused values?
- Do the artifacts and the espoused values align?
- Looking at one small facet of the congregation, what do we think people assume about that facet? Examples to look at are... when people hear religious school what do they assume; Friday night or Saturday morning services; the Oneg Shabbat; dues and congregational financial obligations; mail and communications from the congregation; the youth group; WRJ?

Part IV: Next Steps

- Summarize the Discussion.
- What are your next steps?

ALN Participant Notes Page

Creating a Relational Congregation and Financial Practices Consistent with Your Synagogue Vision

Catherine Fischer, Director of Membership and Programming of Congregation Rodeph Shalom in Philadelphia

This webinar focuses on how to create a synagogue community that is engaged and relational, and explains how to make the financial aspects of the congregation also engaging and relational.

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Taskforce Discussion Guide

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Part II: Text Study

“Why Is It Hard to Make Friends Over 30,” *The New York Times*

Part III: Central Discussion—Questions to Ponder

- What is the vision that drives and informs how you create and sustain a synagogue community?
- Are the financial aspects and practices consistent with that vision?
- How can/do the financial aspects reinforce and strengthen synagogue community?

Part IV: Next Steps

- Summarize the Discussion.
- What are your next steps?

ALN Participant Notes Page

Changing the Conversation about Evaluation

Amy Asin, Vice President, Strengthening Congregations, Executive Team, URJ

Making change happen in our congregation not only requires learning new ways to engage congregants or run programs or raise funds, it also requires learning new ways to measure what we do. Old measures like attendance and complaints won't go away and shouldn't. But if we are really trying something new, shouldn't we also be looking for new ways to define success?

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Taskforce Discussion Guide

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Part II: Text Study

Eilu d'varim she-ein lahem shiur,

she-adam ocheil peiroteihem

baolam hazeh

v'hakeren kayemet lo laolam haba.

V'eilu hein:

kibud av va-eim,

ug'milut chasadim,

v'hashkamat beit hamidrash

shacharit v'ar'vit,

v'hachnasat orchim,

uvikur cholim,

v'hachnasat kalah, ul'vayat hameit,

v'iyun t'filah,

vahavaat shalom

bein adam lachaveiro,

v'talmud Torah k'neged kulam.

אלו דברים שאין להם שעור,
שאדם אוכל פרותיהם
בעולם הזה
והקרו קיימת לו לעולם הבא.
ואלו הן:
כבוד אב ואם,
וגמילות חסדים,
והשכמת בית המדרש
שחרית וערבית,
והכנסת אורחים,
ובקור חולים,
והכנסת פלה, ולגית המת,
ועיון תפלה,
והבאת שלום
בין אדם לחברו,
ותלמוד תורה כנגד כלם.

From Mishkan T'filah,
CCCAR Press

These are things that are limitless of which a person enjoys the fruit of this world, while the principle remains in the world to come. They are: honoring one's father and mother, engaging in deeds of compassion, arriving early for study, morning and evening, dealing graciously with guests, visiting the sick, providing for the wedding couple, accompanying the dead for burial, being devoted in prayer, and making peace among people. But the study of Torah encompasses them all.

Text Study Questions

- The text tells us that these things are limitless and immeasurable. We are told that this means that we cannot ever have done enough of them. There is no point at which we can say, we have made enough peace. Do you agree with this precept—that there is no limit to what we can do in these areas?
- Pick one of the areas that relates to something that you do at your congregation. Even if the amount you do should be limitless, how can you tell if you are doing it well? What measures would you use?

Part III: Central Discussion—Questions to Ponder

- Do a “conversation audit”? When you talk about what is going well or not going well in your ALN topic area, what are the measures that you are using to define success? Are they old measures or new measures?
- What is one new measure that you can start to use in your ALN area? How can you collect data?
- What are two or three success stories based on new measures that you want to start sharing? How can you use these stories to start changing the conversation about success in your congregation?

Part IV: Next Steps

- Summarize the Discussion.
- What are your next steps?

ALN Participant Notes Page

Connected Learning in the Digital World

Miriam Brosseau, Director of Engagement and Program Director of ELI Talks for See3 Communications. Miriam is an experienced social media coach and strategist who loves helping organizations engage their communities and reflect their voice, vision, and values online.

Part I: Topic Overview

Building any learning network takes work, and it can seem particularly challenging online. But “connected learning” in the digital world also offers unique opportunities for growth. In this session, we’ll take a look at what makes a healthy community of practice, explore how those elements look and feel different online, and uncover how to make the most of our online learning.

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Part II: Central Discussion—Questions to Ponder

- What are our goals for our learning?
- If we are wildly successful, how will our work/congregation be different?
- What will it take to make our learning a regular practice? How can we build it into the existing system, and where will we have to develop new behaviors?
- How transparent will we be? What are the boundaries? How can we embrace vulnerability to help deepen the connections in our community while maintaining a sense of safety or privacy?

Part III: Next Steps

- Summarize the Discussion.
- What are your next steps?



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