

## LOOKING AT FOUR OPTIONS FOR A CONGREGATION'S FUTURE:

### Guide to Data Gathering

Many communities, at times in their existence, are forced to face important decisions about their viability. Because of population and demographic shifts, building and revenue issues, or sometimes other factors that cause a significant drop in membership, the community has to determine its options. There are generally four options for communities to consider:

- Stay the course
- Merge/consolidate/collaborate/fully or partially combine services or resources with another community
- Downsize/right size
- Close with dignity and leave a legacy

We have created this tool to help *kehillot* (Jewish communities inside and outside the walls of a synagogue) collect the important data and information necessary to start the process of creating an action plan.

#### INITIAL DATA COLLECTION

The following information is important to have in considering any of the four options:

1. A complete listing of current program offerings, classes, *minyanim* (daily services) and other services
2. How often is the building in use by members? Which spaces are used regularly? What are the space and room requirements for current programs?
3. Where are your members living in relation to the current building? How long does it take for the average trip to the synagogue for the average member?
4. What is the current staffing pattern?
5. A complete inventory of space, ritual objects, office and kitchen equipment, siddurim, chumashim, machzorim, plaques, memorial plaques and other assets
6. Attendance records for a five-year period, including High Holiday tickets and attendance, regular Shabbat participation, etc.

## Option #1 - Stay the Course

- What is your projected revenue for current fiscal year?
- How much revenue is needed to cover expenses?
- How much money is currently held in reserves (savings, endowments, investments, cemetery fund)?
- What professional contracts are outstanding and how much longer do they run (clergy, professional staff, and maintenance)?
- What equipment contracts are in effect and for how long (office machines, cable, internet, cell phone, etc.)?
- Is there a current capital repair needs list? If so, what are the needs and repairs that **MUST** be addressed within 12-24 months?
- Are there projects currently underway? Has a bidding process taken place?
- Are there any current tenants or rental users? If yes, please list and the terms of the lease(s). How much notice must be given to terminate each agreement?
- Do you have an existing arrangement with a caterer? School? Early elementary education group?
- Do you own and manage your own cemetery?
- Is there a legacy, endowment or planned giving program currently active and in place? If yes, what commitments and/or pledges currently exist?
- Please list all commitments: wills, life insurance, endowment gifts

### Data Analysis

- Do you have adequate resources to operate for the next year?
- Do you feel that you would have resources available to operate for the next five years?
- Are you able to achieve your mission and vision with the staff and resources available?
- Do you have a core lay leadership committed and invested in the operation and continued existence of the community and *synagogue*?
- What are the positive aspects of continuing to operate as is?
- What are the negative aspects of continuing to operate as is?

## Option #2 - Merger/Consolidation/Collaboration

If there is no identified partner yet, what are the key elements you are looking for in a suitable partner?

Please check off:

- ☐ Egalitarian/non-egalitarian
- ☐ Location
- ☐ Clergy
- ☐ Community culture
- ☐ Programming
- ☐ Resources
- ☐ Building
- ☐ Services
- ☐ Other \_\_\_\_\_

If there is an identified potential merger/collaboration partner:

- Is the clergy aware of any discussions or exploration taking place?
- Is there a neighborhood that would meet the needs of the majority of your membership?
- Is a merger/collaboration/shared resources option financially viable?
- Would there be a need for equitable standing (lay leadership, honors) if applicable?
- What would be an achievable time frame?
- Would the process need to be achieved in stages?
- Would you be able to maintain your religious identity and denominational connection?
- Does potential partner offer an acceptable staffing infrastructure?
- Does potential partner have paid staff or is it primarily volunteer/lay run?
- What staff is currently under contract and what process would be in place to decide on clergy and staff for a merged entity?
- Is new location accessible to your current membership (ADA, walkers, people who don't drive)? Is there a plan to accommodate your membership in a new location?
- Is your lay leadership aware of discussions taking place?
- Is your general membership aware of plans or conversations taking place?
- What is your communication plan to keep your membership informed regarding the process?
- What is the process required to approve any proposed agreement?

### Data Analysis

- What are your main reasons for seeking a joint venture? Financial, membership size, access to more or

better programs, space related?

- What are your main challenges or impediments to a merger/ collaboration?
- Are leadership and the general membership on the same page regarding merger/ collaboration possibilities?

## **Option #3 - Downsize/Right Size**

- What is the square footage in your current building?
- What spaces, of what size, are needed (offices, classrooms, sacred spaces) for your current level of activity?
- How many paid staff do you currently employ?
- What staffing do you need to meet the needs of your current membership?
- Is there overlap among staff (job description) duties/responsibilities?
- Do you require full time clergy/staff or are there part-time options?
- Detail areas where cuts can be made (programs, activities, budget).
- Is rental space (e.g. office bldg., other religious institution, school, bank) available within your current catchment area?
- How big is your core, active participating group? Can they be helpful in a possible move?
- Are there options to sell your building and lease from a new owner?
- Has a recent independent appraisal of the property been done to assess its value and potential for sale?

### **Data Analysis**

- Is sale of your building a viable option?
- Would there be significant resistance to the sale of the building? If yes, what issues would be the source of the conflict?
- How would functioning in a smaller, different space impact your community?

## Option #4 - Close with Dignity/Create a Legacy

- Would closing cause significant impact on your current membership?
- Would closing have an impact on the greater community?
- Where would your current members join or attend services? Are there other options nearby?
- What are your total assets?
  - Dollars\_\_\_\_\_
  - Building value\_\_\_\_\_
  - Torah\_\_\_\_\_
  - Ritual objects, silver\_\_\_\_\_
  - Memorial plaques, tree of life etc. \_\_\_\_\_
- How would your assets be divided and allocated? What process would be used to make these allocation decisions?
- Is there a cemetery? Is there a Jewish Cemetery Association which could assume management? Is there a perpetual care fund? Transfer of ownership?
- *Yahrzeit* Boards – where would they go? Identified partner?
- Could you sell fixtures, equipment, etc.?
- What is your outstanding debt?
- Are there contracts to close? Leases to end? Is there an early payoff penalty?
- What would be a doable time frame?
- How would you let people/community know? what is your communication plan?
- Process closing with congregation and create a ceremony.
- Have you worked with a historical society/university or archives to create a history/legacy of the congregation?
- Have important papers been collected and saved? Are there members who would be willing and able to take on this project?
- What would be the legacy that your community would like to leave behind? How and where do you want the congregation to be remembered?

### Data Analysis

- Is there any demographic data indication the potential for community growth?
- Is there any kind of lay leadership succession or does the same small group handle all the work and operations?
- Do you have the resources to maintain an acceptable quality of communal life?
- Do you have a *minyan* on a regular basis?
- Have your regular attendance numbers dropped over the last five years? If so, by what percentage?