



BETH DAVID

REFORM CONGREGATION

Seek. Learn. Do.

ANNUAL CONGREGATIONAL MEETING

June 11, 2023



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Beth David Community Highlights 2022-23





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Three Paths to a Thriving Future **Update**

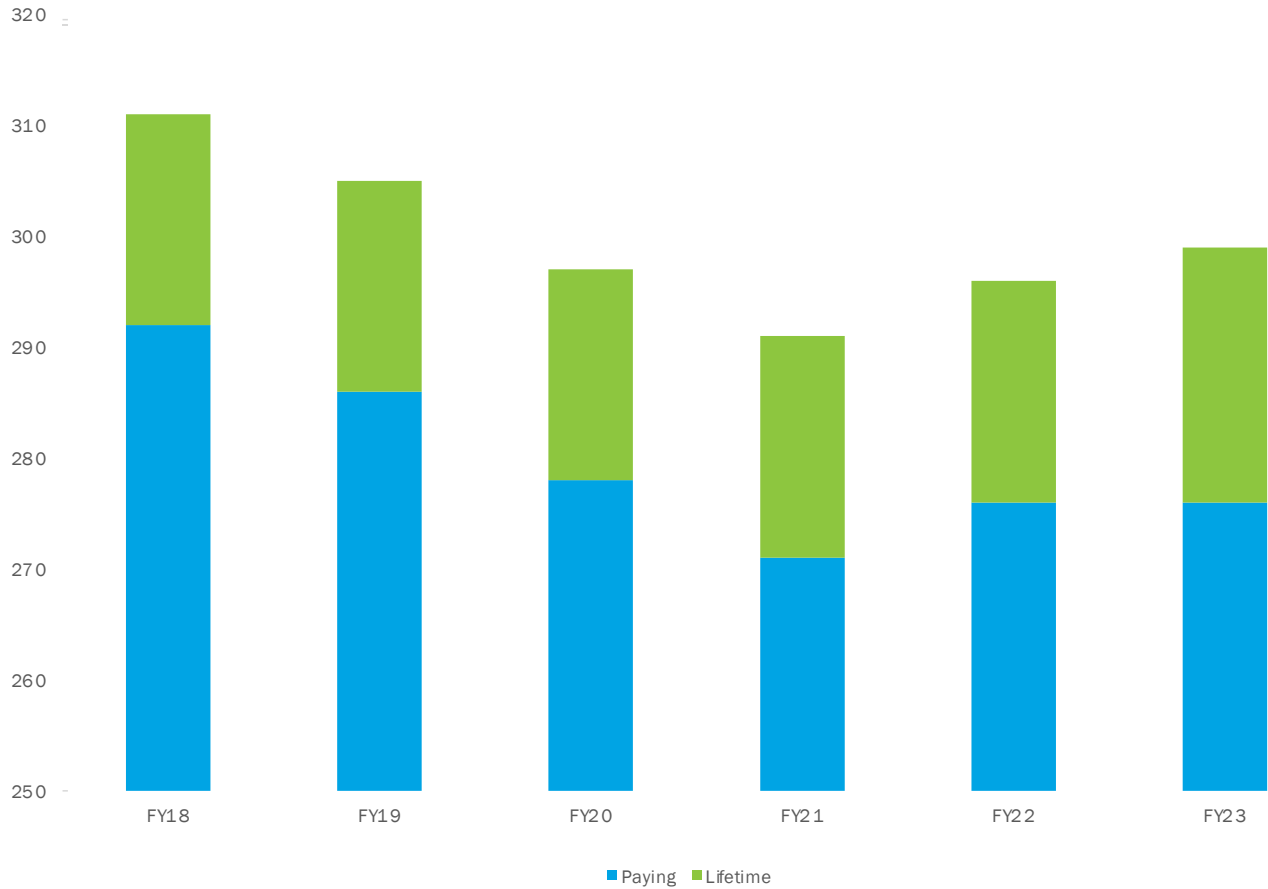
URJ Benchmarking (2020-21): Review

- **Conducted three benchmarking evaluations in 2020-21**
 - Congregational Survey
 - Financial and Operational Assessment
 - Board Self-Assessment
- **Compared BD to peer synagogues**
 - 37 suburban and urban temples with 200-500 membership units
- **Congregational survey - 230 individual responses (56%)**
 - Representative cross-section (age, involvement, religious school, etc.)

URJ Benchmarking (2020-21): Takeaways

- **High congregant satisfaction**
- **Structural financial obstacles compared to peers**
 - Disproportionate reliance on annual commitments, school fees and philanthropy; lacking other revenue sources
 - Some success in recent membership trends, but loss of any members has significant financial impact
 - Obstacles to expanding use of facility for additional revenue
 - Lack of endowment and legacy giving program
- **Significant efforts over last two years, but challenges remain**

Beth David Membership Trends FY18-FY23



Responding to Benchmarking Findings (2021-22)

- **Board established *Three Paths to a Thriving Future***
 - Strengthening our Roots (financial sustainability)
 - Branching Out (membership models, recruitment, retention)
 - Blossoming (experience of religious school, teens, young families)
- **Financial Sustainability**
 - Alternative use of facility/revenue generation
 - Review expenses for potential savings
 - Transition to ShulCloud and Kesef
 - Philanthropy
 - Small group of anonymous donors commit to retire \$1.1 million mortgage
 - Challenge leads to Campaign for Beth David

Responding to Benchmarking Findings (2021-22)

- **Membership Models, Recruitment, Retention**
 - Congregant interviews, researched membership models
 - Findings and recommendations:
 - Making membership more meaningful
 - Membership categories and dues
 - Expanding membership
- **Religious School, Teens and Young Families**
 - Successfully navigating year two of pandemic
 - Enhancements – Beth David Boogie, Impact Center
 - Completed education Director search and expansion to full-time position

Three Paths Efforts – Year 2 (2022-23)

- **Completed mortgage payoff**
- **Campaign for Beth David - \$1.1 million pledged to date**
- **Authorized establishment of endowment**
- **Alternate uses of facility/revenue generation**
 - Yeshiva Ketana
 - Potential preschool startup – The Harmony School at Beth David

Three Paths Efforts – Year 2 (2022-23)

Potential Preschool – Local Market Research

	FULL ENROLLMENT	WAITING LIST FALL 2023
Beth Hillel - Beth El	YES	YES
Main Line Reform Temple	YES	YES
Har Zion	YES	YES
Friends' Central School*	YES	YES
Gateway	YES	YES
Phebe Anna Thorne	YES	YES
Wetherill	YES	YES
West Hill	YES	YES

*FCS Nature Nursery began 2021 with capacity for 28 2 Y.O.s. At capacity, waitlist for Fall 2023. Prior to 2021 FCS “cookie cutter” preschool received 3-4 applications. Suggests school philosophy matters.



Three Paths Efforts – Year 2 (2022-23)

Potential Preschool – Mission Alignment

- Beth David Mission: *Inspiring a **community** of **seekers, learners,** and **doers** to pursue the best in ourselves and the **repair of the world** (*tikkun olam* תיקון עולם).*
- We hope that our preschool will help us....
 - Increase **membership**, perhaps by a few students/families per year.
 - Start **building community** among families earlier, during the preschool years.
 - Bring in revenue that supports **all of our work** as a congregation.
 - Help us solidify our reputation in the wider community as **inclusive, creative,** and **social justice-focused**.
 - **Find new models** of bringing **multicultural and interfaith Jewish families** into the center of our communal vision.
 - Make **Jewish learning** more accessible and appealing to a wider spectrum of families, starting at an earlier age.
 - Continue to make **tikkun olam** integrated into everything we do.

Three Paths Efforts – Year 2 (2022-23)

Potential Preschool – Sample Responsibility Matrix¹

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Harmony School

Collaboration

Beth David

Curriculum
 Staff
 Students
 Families
 Regulations
 Preschool materials & supplies
 Managing Budget & finances
 Insurance*

Jewish learning & integration in classroom
 Weekly School Shabbat
 Family Programming
 Safety & security
 Marketing
 Approving budget

Zoning
 Building maintenance
 Community connections
 Insurance*



¹Discussions ongoing regarding potential operational frameworks and allocations of responsibility.

Three Paths Efforts – Year 2 (2022-23)

Potential Preschool – Key Next Steps

- Complete review of latest draft startup and operational budgets
- Reach conceptual agreement on partnership structure (allocation of responsibilities, revenue, expenses, etc.)
- Approach Lower Merion Township on preschool proposal (zoning and other approvals)
- **If project appears viable:**
 - Prepare zoning application for relief from special exception conditions
 - Reach out to neighbors
 - Prepare written agreements
 - Evaluate any additional insurance needs
 - Continue securing certifications and regulatory compliance
 - Recruit staff
 - Prepare and execute marketing plan
 - Potential startup target – January or September 2024(?)

Three Paths Efforts – Year 2 (2022-23)
Religious School, Teens, Young Families



Three Paths Efforts – Year 2 (2022-23) Religious School, Teens, Young Families



Three Paths Efforts – Year 2 (2022-23) Religious School, Teens, Young Families



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Three Paths Efforts – Year 2 (2022-23) Religious School, Teens, Young Families



Three Paths Efforts – Year 2 (2022-23)

Outdoor Space Planning

After three years of COVID, synagogues have “new normal”

Area Synagogues Begin to Make Better Use of the Great Outdoors

By Jarrad Saffren - October 4, 2022



Parking lots have become more than a synagogue's place for cars

Area Synagogues That Went Outdoors during the Pandemic Are Opting to Stay There



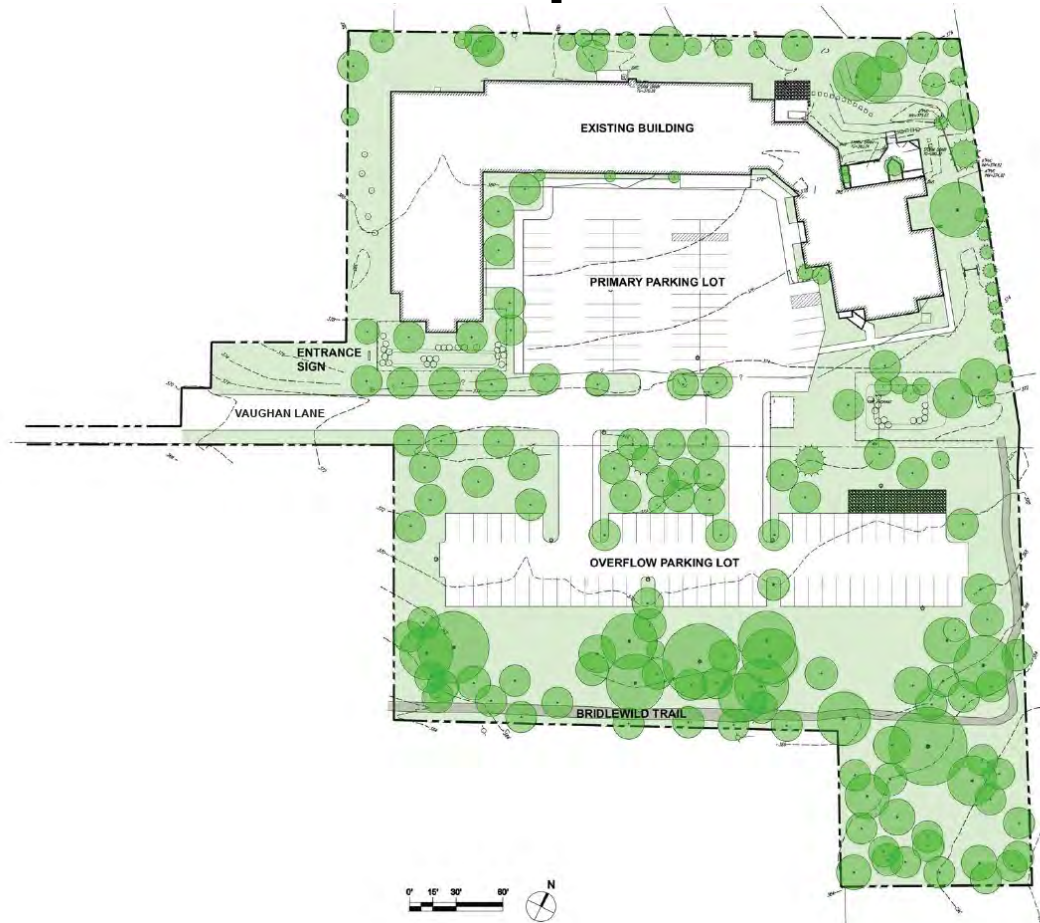
A SMALL COURTYARD INSPIRES BIG ENGAGEMENT AT NORTH SHORE SYNAGOGUE



Three Paths Efforts – Year 2 (2022-23)

Outdoor Space Planning

Existing
Conditions



Three Paths Efforts – Year 2 (2022-23)

Outdoor Space Planning

PROGRAM GOALS

SPIRITUAL: Create a space (or series of spaces) to host outdoor worship and prayer, and facilitate reflection and communion with nature.



PLAY/EDUCATIONAL: Leverage the natural environment as a platform for learning about ecological systems and playing with nature. Create mini outdoor classrooms for use by Hebrew School.



SOCIAL/ECOLOGICAL: Create an inclusive and accessible space that serves as a green outdoor gathering hub for the congregation. Enhance native habitat and contribute to improving ecological health of campus.





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Chief Financial Officer Report



Chief Financial Officer Report

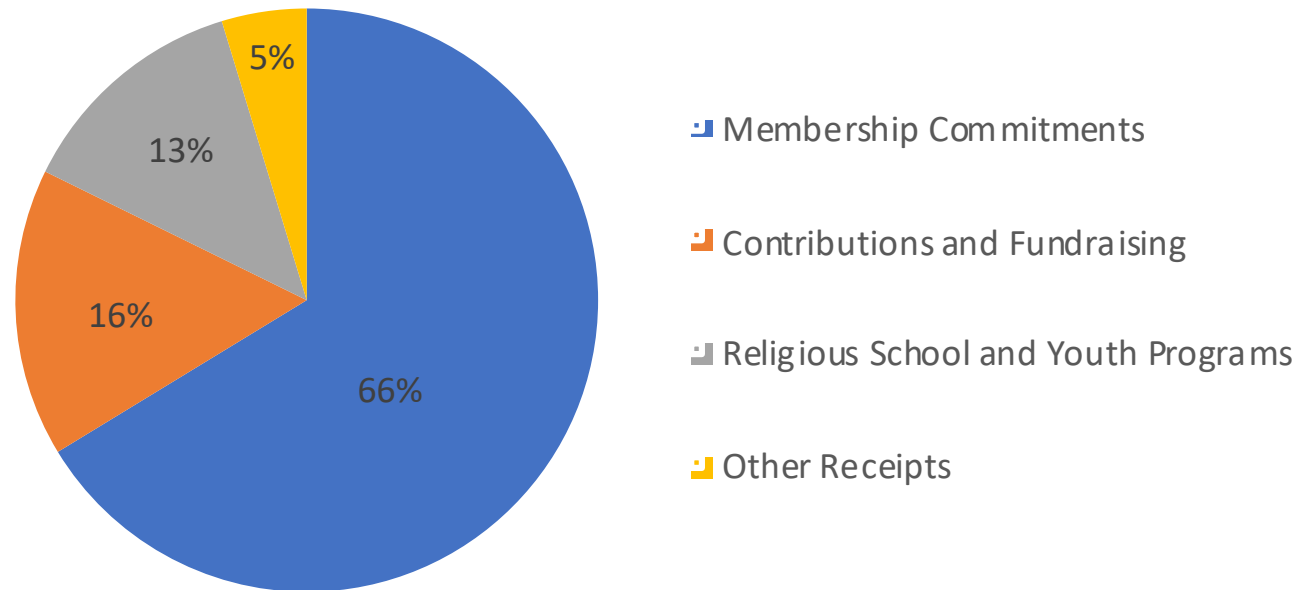
- **CFO, Treasurer, and Finance Committee monitor Beth David's financial activities and health (short- and long-term)**
- **Developments during FY23:**
 - Payoff remainder of WSFS mortgage
 - Maintained paid membership unit count
 - Received two grants (\$35,000 total) to offset security expenditures
 - Continued to receive pledges to the Campaign for Beth David
- **FY23 Budget**
 - Approved with \$67,000 deficit
 - Current projected deficit \$153,000 (assumes conservative \$45,000 net from June fundraiser)
 - Based on this projection, "rainy day" fund (\$404,000 as of 4/30/23) would reduce to \$251,000
 - Expecting some additional revenue before 6/30: membership commitments, Yeshiva Ketana lease

Chief Financial Officer Report

- **FY24 Membership Commitment and Tuition Levels**
 - Board approved modest 2.5% increase in basic commitment categories and religious school tuition in light of rising expenses
 - No changes to security fee, building fund, voluntary giving levels
- **FY24 Budget**
 - Projected deficit of \$120,000

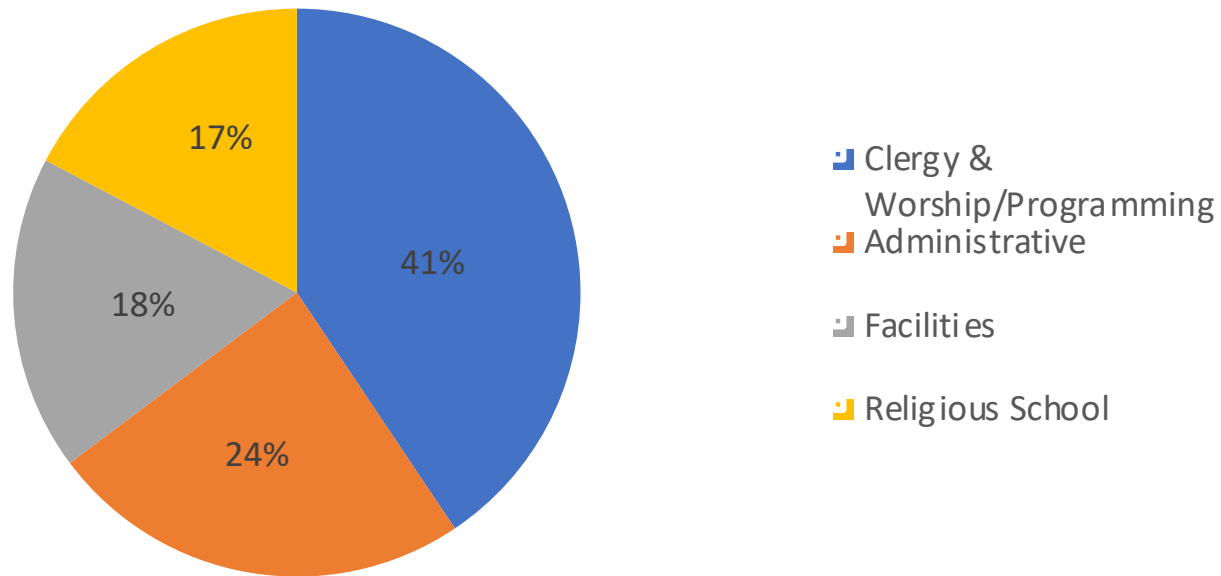
Chief Financial Officer Report

FY 24 Budget Receipts



Chief Financial Officer Report

FY 24 Budget Expenses



Strategic Priorities Task Force

- **In conjunction with approving FY24 budget, Board directed creation of task force to help reduce future deficits**
 - short-term and long-term recommendations to stabilize finances in areas such as membership recruitment and retention, fundraising, other revenue sources, controlling or reducing expenses, etc.
 - includes strategic use of Campaign for Beth David funds
 - *Three Paths* remain important framework
 - Next steps:
 - reaching out to potential task force members
 - meetings June-July
 - present recommendations at July Board meeting