



BETH DAVID

REFORM CONGREGATION

Seek. Learn. Do.

ANNUAL CONGREGATIONAL MEETING

June 9, 2024





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Beth David Community Highlights 2023-24





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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 FY24:**
 - Maintained paid membership unit count – increased by 2 units (from 268 to 270) since 6/30/23
 - Received two grants totaling ~\$21,000 to offset security expenditures
 - Continued to collect pledges to the Challenge Campaign established in response to the loan payoff donations
 - Established endowment fund to support operating budget and other priorities
 - Pursued alternative revenue sources including lease to local yeshiva (permitted for summer camp only) and Harmony School at Beth David preschool program (currently in zoning approval phase)
- **FY24 Budget**
 - Approved budget last Spring with projected \$120,000 deficit
 - Experienced lower than expected receipts for membership commitments and school tuition/fees
 - However, received several significant one-time unrestricted donations
 - Due to successful Spring Fundraiser, expect to end FY24 with positive net income

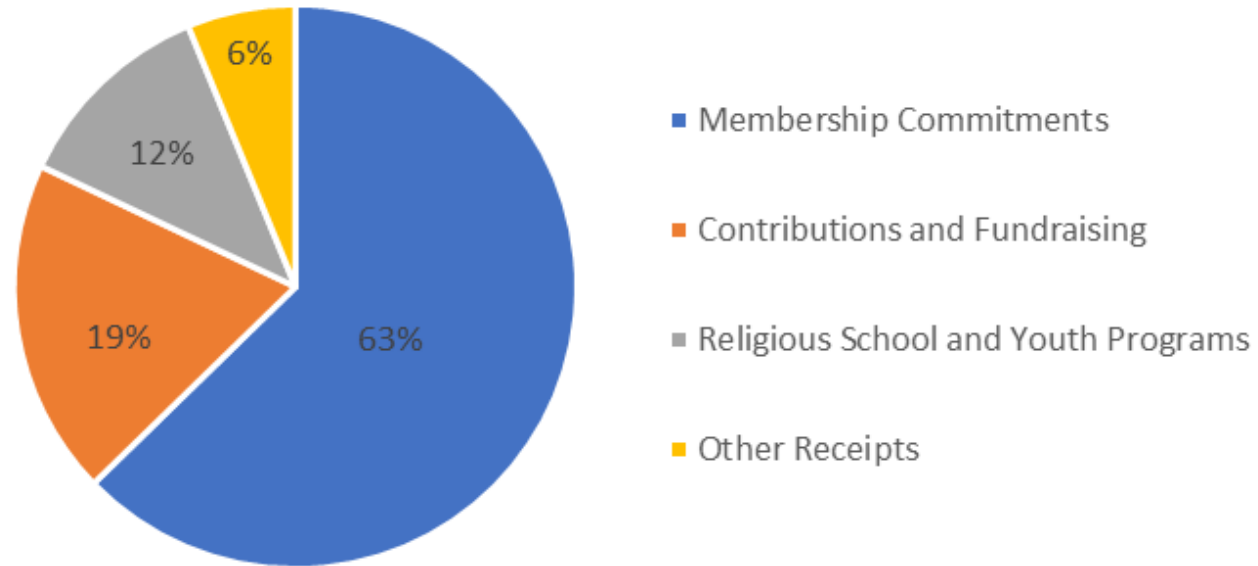


Chief Financial Officer Report

- **FY25 Membership Commitment and Tuition Levels**
 - In light of increasing expenses, Board approved an average 3.5% increase in basic commitment categories and religious school tuition
- **FY25 Budget**
 - Projected deficit of approximately \$122,000

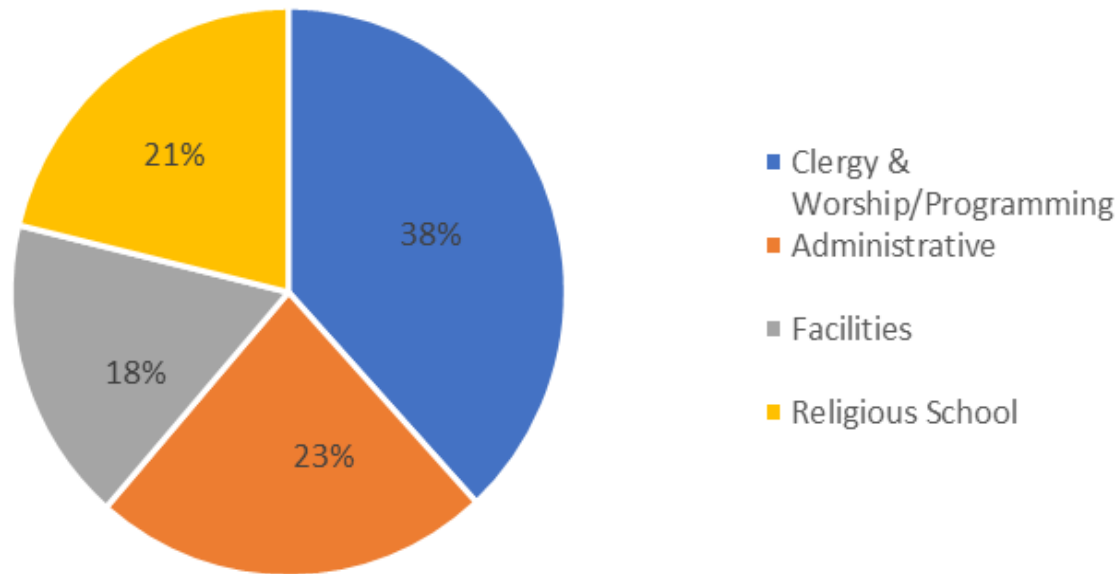
Chief Financial Officer Report

FY 25 Budget Receipts

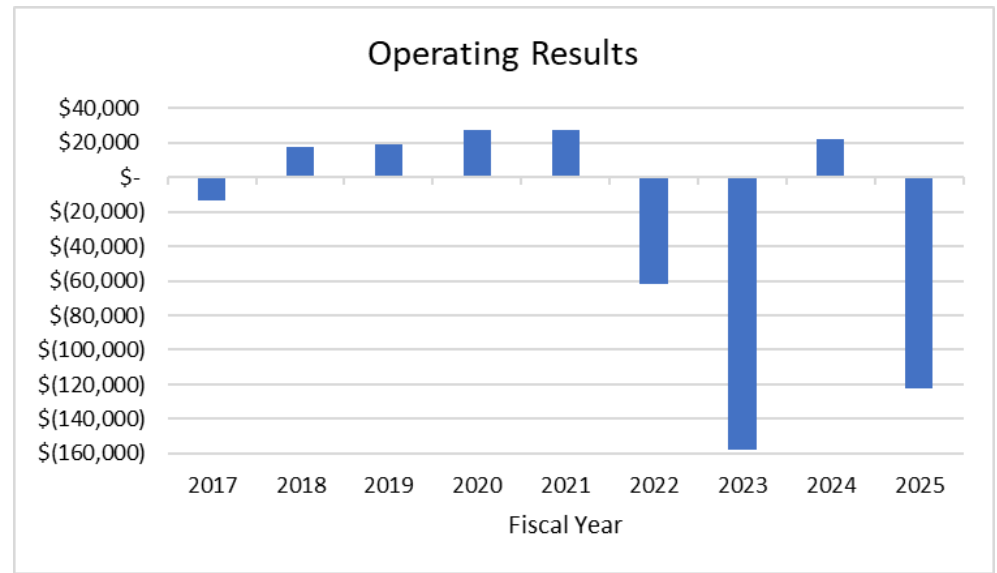
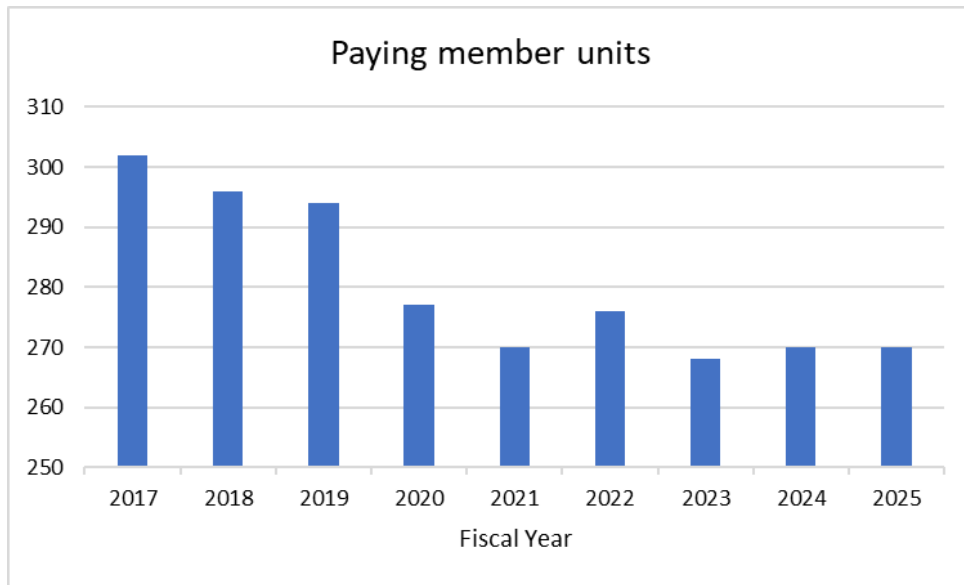


Chief Financial Officer Report

FY 25 Budget Expenses



Chief Financial Officer Report





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Three Paths to a Thriving Future **Update**

Strategic Priorities Task Force Recommendations

- **FY24 budget - Board established Strategic Priorities Task Force**
 - Recommend short-term and long-term initiatives to help address future deficits
 - Strategic use of Campaign for Beth David funds (and capital repair funds), guided by *Three Paths to a Thriving Future* objectives
 - Strengthening our Roots (financial sustainability – new revenue sources, developing philanthropy, evaluating cost saving opportunities)
 - Branching Out (membership models, recruitment, retention)
 - Blossoming (experience of religious school, teens, young families)
- **Task force met several times in Summer 2023**
- **Recommendations presented and considered in Fall 2023**

Strategic Priorities Task Force Recommendations (cont'd)

- **Previously approved:**
 - seed our first true endowment fund
 - upgrade sanctuary sound system
- **Approved Fall 2023:**
 - startup costs for new full-time preschool
 - legal and related costs related to zoning issues
 - one year of marketing/PR/communications consulting and implementation
 - support toward outdoor space enhancements for play/social area
 - enhance existing early childhood programming
 - enhance adult education programs
 - support congregational outings
 - support religious school family activities

Preschool Project

- **Fundamental to *Three Paths* goals**
 - potential on-ramp for new members
 - build community among families during preschool years
 - generate revenue over long term
 - further BD's reputation as inclusive, creative, social justice-focused
 - new models to bring multicultural and interfaith Jewish families into our community
 - make Jewish learning more accessible/appealing to more families at earlier age
 - continue to integrate *tikkun olam* into everything we do
- **Benefits larger community by addressing preschool demand**



Preschool Project (cont'd)

- **Conditional Use Application submitted November 1, 2023**
 - amend prior conditions of approval
 - operate a preschool M - F, 7:30 am – 6:00 pm
 - maximum 90 students
- **Outreach to neighbors and Gladwyne Civic Association**
- **Beth David Traffic Study**
 - minimal traffic impacts at intersection, no improvements needed
 - adequate existing parking, no significant queuing
- **LMT Planning Commission Meeting – December 4, 2023**
 - Township Engineer agreed with our engineer's report
 - LM Planning staff – supported approval with comments
 - Planning Commission recommended approval subject to staff comments
- **St. John Vianney opposition**

Preschool Project (cont'd)

- **Conditional Use Hearing**
 - Four sessions – February, March, April, May 2024
 - Mostly focused on alleged traffic impacts
 - Much support from Beth David members, local clergy, others
- **Hearing Officer report/recommendations to Commissioners**
- **Next steps in conditional use process:**
 - Commissioners' Building & Planning Committee meeting
 - Monthly Commissioners meeting
- **Working on budget, insurance, allocation of responsibilities, etc.**

Harmony Camp at Beth David

- Beth David's first vacation day camp program
- Three weeks: August 12-30
- Focus on *tikkun olam*, arts/dance/movement
- Supports our mission, provides service to members and wider community
- Information and registration live on website
- Promoting through various outlets
- Please help spread the word!



Harmony
Summer Camp at Beth David

Gladwyne, PA ♦ Ages 3-8 ♦ (610) 937-2032

Dance
Music
Art
Nature
Jewish Values

More info: 

 BETH DAVID
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 UNION for
REFORM
JUDAISM

The graphic features two photographs: the top one shows children in a field holding up colorful streamers, and the bottom one shows children working on a wooden boat project. The text is arranged in a clean, modern layout with a purple header, a red wavy banner for contact info, and a white background for the activity list and logos.

Endowment Fund

- Board approved endowment policies in March 2024
- Initial funding ~\$330K
- General endowment fund – unrestricted use for operating expenses or other purposes
- Ability to request establishment of targeted endowment funds
- Endowment Committee oversees investments pursuant to Investment Policy
- Board directs use of distributions pursuant to Spending Rule Policy and legal requirements
- Please consider endowment fund for gifts and estate planning!





Outdoor Space Enhancement Project

**Building for
Beth David's
Future – Play
and Social
Space**



**"...so Rodd, our Board President, suggested
I try a slide presentation."**



CAMPUS MASTER PLAN

KEY FOR MAJOR NEW & RELOCATED SITE IMPROVEMENTS

- 1 ENTRY SIGN
- 2 TRASH CORRAL
- 3 RAIN GARDENS
- 4 FLEXIBLE SOCIAL/PLAY ZONE
- 5 SMALL OUTDOOR WORSHIP SPACE
- 6 LARGE OUTDOOR WORSHIP SPACE
- 7 WET MEADOW FOR STORMWATER MANAGEMENT
- 8 OUTDOOR CLASSROOM & NATURE PLAY
- 9 NATIVE FRUITING TREES
- 10 RAISED GARDEN BEDS
- 11 NO-MOW LAWN
- 12 OVERFLOW GRAVEL PARKING
- 13 REMOVABLE BOLLARDS
- 14 GRASS-PAVE PARKING SPOTS
- 15 BOULDER SECURITY BOLLARDS
- 16 GARDEN SEATING
- 17 RESTORED NATIVE WOODLAND

EDUCATIONAL SPACE



SOCIAL SPACE



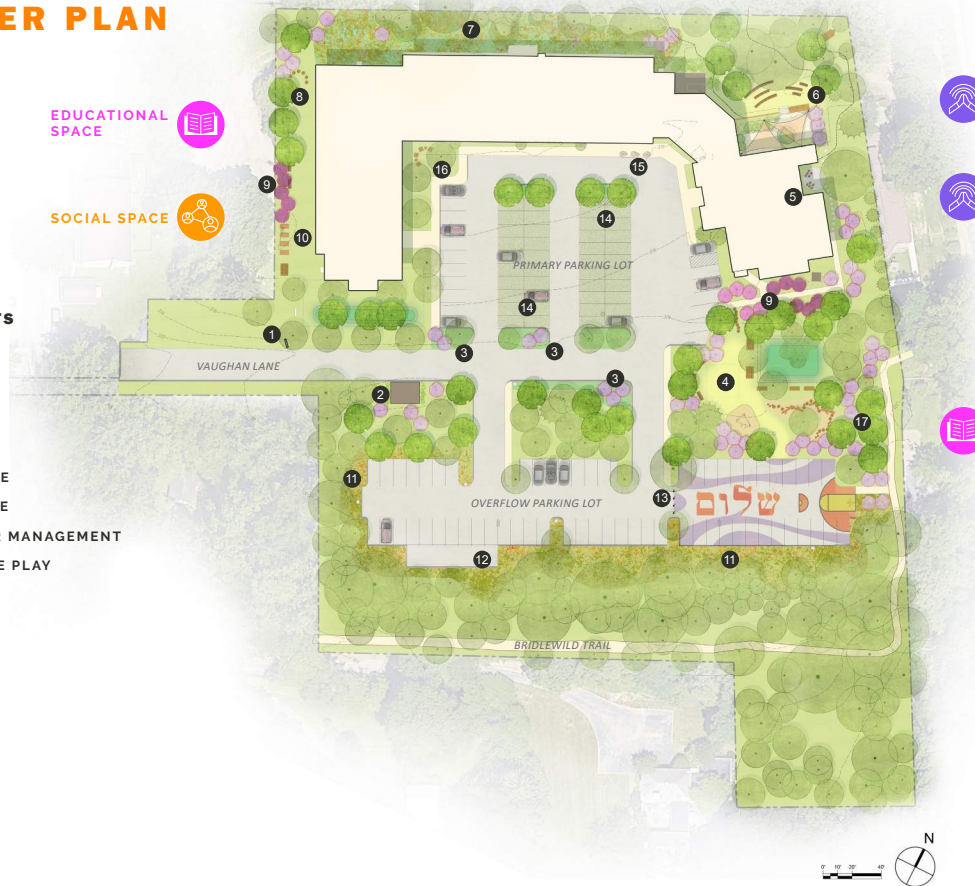
SPIRITUAL WORSHIP SPACE



SMALL SPIRITUAL/SOCIAL SPACE



EDUCATIONAL/PLAY SPACE + SOCIAL SPACE



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MASTER PLAN FINAL DELIVERABLES
08.28.2023

SALT
DESIGN STUDIO



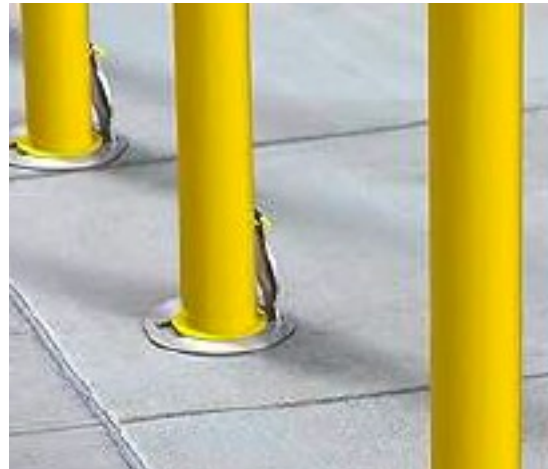
The Design Process



**APIARY
STUDIO**
LANDSCAPE ARCHITECTURE









The Jewish Education
Project Guide to Nature
Based Learning



L'Dor V'Dor (from generation to generation)

Convinced?
Who's in?



*Early on, Billy learned the value of a
slide presentation.*

Membership and Marketing/Public Relations/Communications Initiatives



Membership Report

- Enhancing visibility through outreach activities
 - *Narberth Pride in the Park* (July)
 - *Community Fall Festival* at the Kaiserman JCC in Wynnewood (October)
 - *Purim Celebration* at the Philadelphia Zoo (March)
 - *Yom Ha'atzmaut* event at the Kaiserman JCC (May)
 - Clergy participation in multiple community-based programs

Membership Report

- **Enhancing visibility through PR, marketing and communications**
 - Board approved expenditure of \$80k from Challenge Funds to hire outside consultants
 - Issued RFP; reviewed proposals from 12 firms
 - Selected Feldscher Horwitz Public Relations of Maple Shade, NJ
 - Significant uptick in both print and broadcast coverage
 - Enhanced and deliberate use of social media, including boosted posts and advertising on Meta and Google
 - Developing mechanisms to capture data and measure impact



Join us for a
SHAVUOT PICNIC

Tuesday
June 11
 2024 | 5-7PM

WE'LL HAVE

- Arts & Crafts
- Moon Bounce
- Ice Cream Truck
- Bonfire
- Gaga
- Food

-Blintzes, Pizza, Popcorn, Salad & more



Celebrate Purim *with* BETH DAVID

Beth David Reform Congregation
 by making a friendship bracelet!

STEP 1 Pick your beads and string them on the elastic cord.
 Browse through the collection of colorful beads - including those with Hebrew letters - and select your favorites. *The choice is yours!* to build a bracelet that expresses your individual style.

STEP 2 Securely tie the two ends of your cord together to form a circle.
 Having trouble? *Ask a volunteer* to help you with the knot.

STEP 3 Commemorate the Holiday!
 Share the fun of your bracelet making with a photo on Instagram using *#BethDavidFriends*. And check out more information on Beth David by using the QR code.

*Adults: Be sure to closely supervise young children while doing this activity as beads can present a choking hazard.

[/BethDavidReform](#) [BethDavidReformCongregation](#)

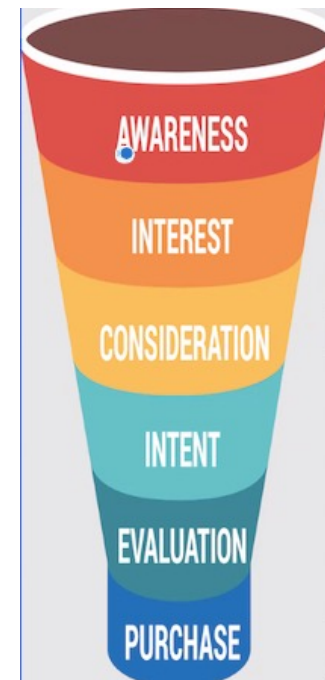
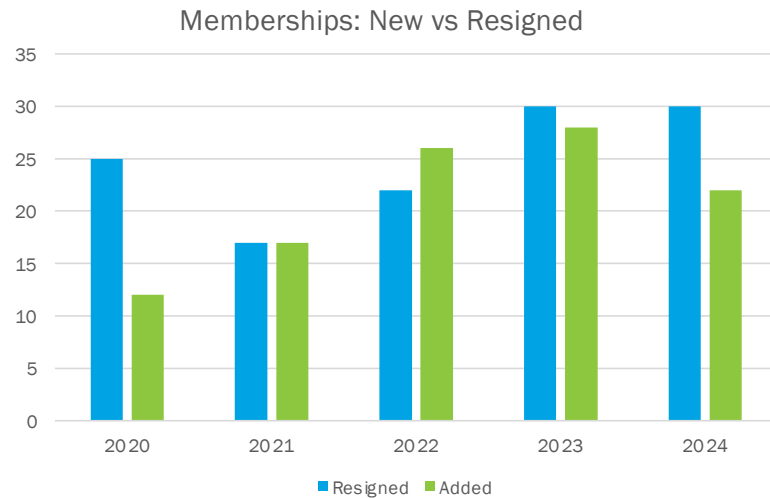


Membership Report

- **Focusing on the experience of current congregants**
 - Enhancing a sense of community (e.g., name badges, Board cohort calls, *Shema Groups*)
 - Ramping up in-person adult learning activities
 - Providing opportunities to bring parents of school-age children together (e.g., *Bagels and Banter*)
 - Varied events tied to Shabbat observance and other Jewish holidays

Membership Challenges

Retention



Participation – Please step up to be part of this effort!!!!!!

Recruitment



Religious School/Teens/Young Families



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Honoring Outgoing Officers and Trustees



Outgoing Officers and Trustees

Officers

Steve Saltzman
(Treasurer)
Jesse Deutsch (CFO)
Josh Broker (VP)
Susan Frant (Secretary)

Trustees

Marc Leader
Deborah Livingston
David Whellan
Alise Wolfgang

Outgoing Officers and Trustees





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Election and Installation of Officers and Trustees



Nominating Committee Slate - Officers and Trustees

Officers:

President -- Jane Horwitz*
Executive Vice President -- Samuel Becker
Vice President -- Marjorie Volpp*
Vice President -- Eric Klinger-Wilensky
Chief Financial Officer -- Michael Delfiner
Treasurer -- Howard Sklaroff
Secretary -- Caitlin Clason
Solicitor -- Judith Meyer*
Immediate Past President -- Rodd Bender* (no vote required)

(* denotes individual currently holds Officer position)

Board of Trustees:

Miles Barel
Louis Bricklin
Joshua Broker
Madeline Gelb
Paula Greenberg
AnneMarie Horowitz
Theresa Jaffe
Adam Podowitz-Thomas
Ilene Rosen
Joshua Seeherman
Seth Werfel