



OurShofar

News from Our Temple Emanu-El Leadership

Birmingham, Alabama

Winter 2009

Temple Wraps Up FY2009 Budget on a Positive Note

The independent audit of the Temple financial statements for the fiscal year ending June 30, 2009 was completed in August. It was the opinion of our auditor, the Fowler Group, that the financial statements presented and reviewed present fairly, in all material respects, the financial position of Temple Emanu-El. They noted the financial records were in the best shape they have been in years, and complemented the staff on their timeliness and accuracy.

We are also pleased to report that the results of the audit reported a surplus of income over expenses. As authorized by the Board of Directors, the surplus funds were allocated evenly between the Capital Improvements Fund and the Reserve Fund. The Capital Improvements Fund is designed to pay for large capital items that need replacing such as air conditioning compressors. The Reserve Fund is dedicated to pay for non-capital items that are an entirely unexpected expense of the Temple.

With these allocations, the Capital Improvement Fund balance is now over \$255,000. The assets of the Reserve Fund are currently over \$146,000 -- with a goal of building it up to represent 20 percent of our operating budget within the next 3-5 years.

Lastly, I want to thank you for allowing me to serve as your Treasurer. I also want to take this opportunity to thank Jason Epstein for helping me with the transition of duties and responsibilities.

David Brandt
Treasurer

If you have any questions or would like to review the audit, please contact our Temple Executive Director, Alan R. Pearlman, at 933-8037, ext 238.

2008-09 FINANCIAL WRAP UP

Income

<i>Dues Income</i>	\$1,304,000
<i>Youth & Education Fees</i>	\$ 178,560
<i>Facility Usage Fees</i>	\$ 33,250
<i>Fundraising</i>	\$ 89,000
<i>Endowment Fund Allocation</i>	\$ 222,500
<i>Shofar Initiative Allocation</i>	\$ 72,290
<i>Other Income</i>	\$ <u>37,200</u>
Total	\$1,936,800

Expenses

<i>General & Administrative</i>	\$ 661,000
<i>Youth & Education Program</i>	\$ 242,900
<i>Programs & Events</i>	\$ 558,800
<i>Worship</i>	\$ 226,200
<i>Union for Reform Judaism Dues</i>	\$ 83,000
<i>Allocation to Capital Improvements and Reserve Funds</i>	\$ 106,100
<i>Other Expenses</i>	\$ <u>58,800</u>
Total	\$1,936,800

See Cemetery Care Fund Update on Page 2



Technology Enhancements Continue

This fall, we have greatly enhanced our communications to the congregation as well as to the general public. Thanks to the generosity of the Michael Wilensky family with a 5-year Shofar Initiative gift to improve our technology, recently our website has been updated and embellished. We are now pleased to report, partially as a result of these improvements, that we now receive over 3,300 visits monthly from 24 countries and territories.

One of the most popular sections of our website is the live webcasting we provide of every Shabbat and holiday service. Over 1,200 people watched some or all of the High Holidays services this past fall, and we received many compliments and donations on-line as a result.

We have also added a Temple Facebook page, to reach those members who enjoy “social networking” via the internet. You can join by going directly from a link on our website. You can also help us “go green” by requesting to receive our monthly bulletin by e-mail or read it via our website. Recently, we unveiled a new contemporary look for our weekly e.letter, known as **e.manu.el.news**. We currently send this e.letter to over 1,400 addresses, and it now provides links directly to other community organizations, as well as to our Temple Emanu-El website and our Facebook page.

With your continued support, we are planning more exciting changes in our website and technology in the future -- stay tuned!

Alan R. Pearlman
Executive Director

If you are not currently receiving our weekly e.letter, you may do so by either going to our website: www.ourtemple.org or by sending an e.mail request to Marianne@ourtemple.org.

Cemetery Care Fund Update

Upon the approval of the Temple Board and membership at the Annual Meeting in June 2008, the Perpetual Care Fund assets were moved to the Grafman Endowment Fund.

Renamed the **Cemetery Care Fund**, this fund is managed based on the Endowment Fund's investment and spending policies to ensure that the fund continues in perpetuity. Its purpose is to provide maintenance of Northside and Elmwood cemeteries, as well as the upkeep of the Jewish section of Oak Hill Cemetery in Jasper. During the past fiscal year (2008-09), based upon requests from the Temple Board, the Endowment Fund made allocations of just over \$51,000 for this purpose. Additionally, we thoroughly reviewed the care and upkeep being performed at the various cemeteries, streamlining costs where possible.

Additionally, an Endowment Board committee has been focusing on increasing the size of the Cemetery Care Fund -- and, over the past year added nearly \$17,000 from the revenues generated from the Yom Kippur Memorial Books and Yahrzeit plaques, as well as proceeds from the sale of cemetery plots.

ON-LINE MEMBERSHIP SURVEYS IN PROGRESS

Early this fall, many members of the congregation were sent on-line surveys to help the leadership gauge how connected these congregants were to Temple Emanu-El and to determine what needs were not being addressed.

This first survey was sent to over 380 individuals identified under the age of 55 years. We were pleased to receive a response rate of over 30 percent -- far greater than the responses received by our previous surveys conducted in conjunction with Project Joseph (1998) and Project Shofar (2006).

Currently, congregants over the age of 55 years are being sent a similar survey. In the spring, upon receiving their responses we will report back to you with what we have learned -- and our plans to meet new needs identified through the surveys.

INNOVATIVE TEEN “MITZVAH PROJECT” REAPS RESULTS

Last year's 7th Grade B'nai Mitzvah class developed a unique approach to gift giving. Early in the year, the parents and kids decided that in lieu of giving gifts to each other to honor their individual accomplishments, that they would pool the money they otherwise would give in small gifts and determine as a group to which charities to donate the proceeds.

During the year, fourteen families contributed a total of \$3,900, while the students studied various charitable causes. Ultimately, the class selected and divided these funds equally among the **Exceptional Foundation, Sit Tight, Inc.**, and a new Temple fund, the **Celebration Fund**, to help families with financial needs in hosting their Bar/Bat Mitzvah event at Temple.

Many thanks to Nathan Marcus and Allana Pinkerton for spearheading the project. This was an outstanding learning opportunity for the class in the real spirit of performing a “mitzvah.” **Mazol Tov!**