

OurShofar

News from Our Temple Emanu-El Leadership
Birmingham, Alabama

Spring 2010

FY2010-11 Budget Progress Report

At press time, the Temple Board of Directors are in the process of putting the finishing touches on the FY 2010-11 Budget (July 1, 2010 through June 30, 2011). The Board is reviewing a balanced budget, which is \$20,000 less than last year. This is reflective of our main source of income, Membership Dues, being less than last year due to economic conditions (*see related story on page 2*).

In addition to the decline in Membership Dues income, budgeting for this year has been a challenge as certain expenses have increased because of inflation, such as health insurance and supplies. In response, the Budget Committee and staff have sought to introduce as many cost-saving measures as possible. For instance, all our vendors were asked to freeze their rates/costs for the coming year. Additionally, energy-saving strategies were developed to combat the increasing utility costs.

The budget process began in March, with the clergy and staff first submitting their budget requests to the Budget Committee. Upon extensive review, the Budget Committee presented their recommendations to the Temple Executive Committee, who in turn has presented it to the Board for consideration. While the final budget is still being studied and analyzed, it appears the final expense numbers will be approximately \$20,000 less than what was spent last fiscal year.

The final budget will be presented at our Annual Congregational Meeting on Friday, June 11 at 5:15pm.

Our deepest appreciation for the endless hours and thoughtful consideration of our Temple Budget Committee: David Brandt, chair and board treasurer, Ronald Levitt, Jason Epstein, Steve Royal, with Mackie Horowitz, ex officio, and Alan Pearlman, executive director.

Your Leadership Is Taking a Long-Term View

Based upon recommendations from the Financial Resource Development Council (FRDC), in late 2009 a committee of Jason Epstein, chair, David Brandt, Steve Royal and Alan Pearlman, executive director, developed a 5-Year Budget Projection. The purpose was to identify the gaps in income versus anticipated expenses. The goal was to assist our Temple leadership in its long-range planning.

Upon reviewing this information, the Executive Committees of the Temple Board and the Grafman Endowment Fund have asked the FRDC to investigate a number of areas to possibly strengthen our congregation's finances in order to enable us to be more proactive, especially in this uncertain economic climate.

As it successfully did in 2006-07, the FRDC is already in the process of forming Task Forces to investigate various opportunities for the congregation to meet the challenges anticipated over the next 3-5 years. The results of this in-depth analysis, along with their recommendations, are to be presented to the Executive Committee of the Temple for their review in the early fall.

Members of the Financial Resource Development Council (FRDC) include:

Temple Board Representatives:

Ginger Held- Chair
Jeffrey Bayer
Lynne Cohen

Grafman Endowment Fund:

Harry Bayer
Joe Bluestein
Faye Levin

Congregational Representatives:

Ronald Levitt
Amy Saag
Brad Sklar

Past Chair: Frank Siegal



MEMBERSHIP DUES UPDATE:

2009 Support Was Successful

We ended the Membership Dues Year (January 1-December 31, 2009) by meeting our goal and collecting over \$1,144,000 in dues from our membership. Appreciation is expressed to the 124 member families who have given generously above the standard dues commitment as Torah Circle Donors (the names of these donors are recognized on the "Century To Century Board" outside the Sanctuary). Volunteers who helped make this a success included Joel Piassick and Jason Epstein.

2010 Effort Now Well Underway

We are currently almost 6 months, or halfway, through the 2010 Membership Dues Year. To-date, we have collected over \$1,100,000 from 579 of our 670+ members. We have slightly less members committed in 2010 compared with last year, representing an increase in families requesting dues accommodations. This is reflective of the challenging economic times we are currently experiencing as our local community felt the impact of the economic downturn later than many other parts of the country.

Note: *Any member who has contacted us who is experiencing economic hardship has been offered dues accommodation. We hope that those of you who have not made your Dues Commitment for this year will do so in the near future. Please contact our Dues Committee Chair, Jason Epstein or Executive Director, Alan Pearlman at 933-8037, ext 238.*

On-Line Membership Surveys Indicate General Satisfaction

This past year, we conducted a series of on-line membership surveys to help us evaluate the overall satisfaction of the congregation with their Temple membership and our communications vehicles. Close to 30 percent of those who received the survey via e-mail responded. Here is a summary of the results:

Connection to Temple

- Ninety-four percent indicated they are happy with their membership.
- Respondents generally feel connected to the Temple. Our younger members (age 55 and younger) generally feel more connected than their older counterparts.
- A majority attended a worship service or event within the 30 days prior to the survey, and those over 55 years are more likely to attend regular Shabbat services.
- Respondents attribute their close ties to the Temple to friends (45%), clergy (38%) and High Holy Days (30%). Our congregants over 55 years also cited that they greatly value the spirituality (35%) offered during worship.

Responsiveness

- An overwhelming group felt the clergy were responsive to their needs and a majority felt like the Temple leadership were responsive.
- Respondents, especially those over age 55 years, felt like the Temple was there for them in times of crisis.

Desired Programs

- Survey respondents indicated that they would like more opportunities to meet others and form strong social bonds.
- A vast majority would also like an opportunity to learn more about Judaism. Daytime classes are difficult for many of the younger respondents to attend.
- Those under 55 years in age were particularly interested in more opportunities to help the less fortunate.

Communication

- The weekly e-mail is viewed as a very effective mode of communication by most.
- The monthly bulletin and personal letters are also well received.

Potential Involvement

- All ages indicated that they would like to learn about ways to get more involved or volunteer.

We greatly appreciate the over 230 members who took the time to participate in the survey to provide their thoughts and ideas. The Temple leadership is reviewing this input closely and is looking at ways to respond to suggestions offered. We will keep you apprised of the results.