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A Planning Handbook for Small-Sized Congregations

Prepared by the Jewish Community Legacy Project
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Introduction

The Jewish Community Legacy Project (JCLP) is the sole organization to exclusively provide resources to help Jewish congregations in small communities in the United States and Canada. We guide synagogues in their planning as they:

1. work through current challenges
2. prepare responsibly for the future
3. ensure an enduring community legacy

JCLP gratefully acknowledges UJA-Federation of New York for its generous grant to pilot this initiative with New York synagogues. Our engagement allowed us to facilitate individual plans and processes with congregations and to publish this handbook.

JCLP tailors its engagement with every congregation to the congregation's specific interests, needs, and circumstances. The outcomes reflect the goals identified by the congregation.

Since 2010, engaging with over one hundred congregations in the United States, JCLP has identified elements that help define the congregations' planning processes. The duration of contact, scope of services, and extent of engagement vary, but every congregation receives the same degree of dedicated attention.

This handbook is a resource for congregations undertaking the planning process. Read it all or simply refer to chapters most relevant to your needs. And if your congregation has already developed a plan or is in the midst of doing so, use this handbook as a supplement. We welcome feedback; this handbook is a "living document" subject to change with new input.

Let the words from our sages inspire you on this sacred journey, assured that you are not alone:

"You are not obligated to complete the task, but neither are you free to desist from it."

—*Pirkei Avot* 2:21

Jewish Community Legacy Project (JCLP)

Email us at info@jclproject.org

Visit our website at www.jclproject.org

Like us on Facebook: <https://www.facebook.com/TheJCLP>

Chapter 1: The Planning Process: An Overview

Introduction

What Exactly *Is* Strategic Planning?

A road map

By engaging in a thorough strategic planning process, you are creating a road map. In fact, “road map” is another term for a strategic plan. A road map includes a clearly defined goal together with the major steps needed to reach this goal. It serves as a high-level document that can be used as a communication tool to help you articulate the “why” behind your strategy and keep everyone on the road to achieving a common goal.

Further, your road map makes your vision, purpose, and priorities clear and guides decisions, such as allocating resources. And it is especially useful during leadership transitions, ensuring consistency versus starting over.

Why Bother?

An inspiring and energizing journey

Yes, the planning process takes time, dedication, fortitude, and resources. But in the long term, there are *huge* potential payoffs that go beyond the stated goals. The journey matters as much as the end product. The learning that takes place along the road to completing a plan will be inspiring as the planners become energized.

With a road map for the journey, the environment will be one that fosters cohesiveness as you bring others along with you in the process. And there could even be a spark of innovation, with unexpected findings!

Questions to Ask before You Begin the Journey

Is there a will to engage in a planning process?

The most important question to ask is if your leadership is committed to engaging in difficult, yet necessary, work. Some may feel that going along, day by day, has worked fine. And they worry that congregants will equate the words *planning process* with undesirable results, such as closing the synagogue. While this may indeed be the outcome, the decision to close will *not* have been taken lightly; it will be infused with careful analysis and collaboration among many stakeholders. The first step is to educate leadership about the benefits of a road map to ensure long-term success. Leadership must be advocates in order for the planning process to be not just accepted but *welcomed* by all constituents!

Are there champions to encourage and follow through with planning?

You will need an individual or a group of leaders who fully support the initiative. Ideally, the synagogue president appoints a board member to lead the initiative. This person is passionate about the synagogue and understands the need to plan for its future. In some congregations with few volunteers, the role of planning chair is taken on by an officer or even the president. With this step completed, your plan will be well positioned for successful completion and execution. Further, you will have fostered a positive mindset among your congregation about the planning process as a community-enhancing initiative.

Is there a commitment to implement the recommendations of the plan?

Implementation of the plan is the desired outcome. The recommendations should include three factors:

1. action steps
2. clearly defined outcomes and indicators
3. key quantifiable metrics

A committee and/or a task force can be assigned by the board to develop the plan. Putting the plan into action should *not* be the responsibility of the planning chair or the president; this is the role of board leadership.

Congregants also have a role to play, from participating, volunteering, and donating to ratifying the plan's recommendations. The plan itself should be accessible, as well as easy to read, understand, and implement. The planning process includes regular reporting to the broader congregational constituency to ensure buy-in and build a culture of involvement.

Does your congregation need help in developing its plan?

With no institutional ties, JCLP serves as an impartial advisor to congregations, helping to develop plans that reflect their wishes, needs, and values. Plans are then implemented with the assistance of the congregation's existing institutional partners or with partners introduced by JCLP. No congregation should feel alone during this process!

Jewish Community Legacy Project (JCLP) Email: info@jclproject.org
Website: www.jclproject.org

Types of Plans

While plans have common elements, each congregation's plan is unique. Congregations develop plans based on their viability, demographic profiles, and current needs.

Plans Addressing Immediate or Emergency Concerns

Before a congregation can undertake a comprehensive planning effort, it should resolve issues requiring immediate attention. Examples include the loss of a rabbi, resignation of a president, or funding a capital repair.

Plans for Special Projects

Certain major initiatives require the development of a plan:

1. Fundraising Plan
 - cemetery preservation endowment campaign
 - building preservation campaign
 - life and legacy for congregants' testamentary giving
2. Succession Plan
 - officers and board
 - committee chairs
3. Membership Engagement and Outreach Plan
 - increased participation
 - addition of new members

Long-Range Legacy Plan

This plan has two components:

1. Sustainability Plan
 - issues indicated in "Special Projects"
 - demographic and financial forecasts
 - ongoing planning issues
 - course to extend the life of the congregation
2. Legacy Plan
 - actual or potential end of the congregation

Undertaking the planning process involves addressing the Jewish demographic realities of your congregation to determine if your synagogue can be sustained. This can be difficult, since the outcome could be the decision to dissolve the congregation. A sustainability plan is an acknowledgment that there are immediate steps to preclude this outcome. For some congregations, creating a legacy plan simultaneously is a positive step.

Elements of the Planning Process

Governance

The board should approve the planning process and endorse the chair appointed by the president. In some congregations, especially those with few members, the membership is asked to approve the process. If that doesn't happen, the membership approves the final planning report and recommendations.

Inclusion

Your synagogue's plan, from specific concerns to legacy decisions, requires the input and support of members. All believe they have a stake in the future of the congregation and should help it to remain viable or approve its dissolution. For example, the views of congregants about such issues as whether to stay in the building, which programs are relevant and should be kept, and/or fundraising campaigns are important. All parties, across a range of interests, should be asked for their input, consulted, and/or informed at the appropriate time, in the appropriate venue.

Planning Structure and Process

Some congregations recruit a committee from among their members. Others rely on officers and board members to serve on a long-range planning committee. For some, one person—such as the president—works with the facilitator and presents the plan to the board and congregation.

Determining whether to have a long-range planning committee depends on the following:

1. interest of congregants
2. number of volunteers
3. size of congregation
4. time needed to complete the plan

The most successful plans have the strong support of the synagogue's president, whose passion, focus, and commitment determines smooth plan development and implementation.

Leadership approves the four basic elements of the planning process:

1. chair and committee
2. issues to be addressed
3. implementation steps
4. timetable

All are subject to change due to circumstances. The typical planning process takes about one year.

Planning Document

The planning document generally has five components:

1. Goal
 - “The synagogue will have a leadership succession plan.”
2. Key Results
 - “The synagogue will have a pool of leadership candidates for the next ten years.”
3. Metrics
 - “The synagogue will have an identification, recruitment, and training process for six new leadership candidates.”
 - Person responsible for implementing specific recommendations
4. Timetable
 - “The leadership succession plan will be completed by April 30, 2022, with a new slate of officers assuming leadership by July 1, 2022.”
5. Follow-Up
 - “An in-person interview will be conducted with every officer by October 1, 2022.”

Plan Completion and Follow-Up

Take and record minutes for each meeting; they have archival significance. The long-range planning committee schedules meetings throughout the process and sends periodic communications to the congregation. Four groups approve the plan:

1. long-range planning committee
2. officers
3. board
4. congregation

The document should be saved and archived, with follow-up reports submitted to the congregation. Recognize all participants with the consistent message that you value *all* congregants.

Institutional Partners

Executing a plan often requires the assistance of outside organizations. Jewish Community Legacy Project (JCLP) helps facilitate the planning process, oversees plan implementation, and introduces or reconnects synagogues to other partners. These partners include the following:

- Denominational Partners

National religious organizations provide an array of services to their member organizations and sometimes to nonaffiliated ones.

- [Orthodox Union](#) (OU)
- [Reconstructing Judaism](#)
- [Union for Reform Judaism](#) (URJ)
- [United Synagogue of Conservative Judaism](#) (USCJ)

- Jewish Federation Partners

- The Federation (UJA-Federation of New York or your local federation) can assist in planning, endowment development, and support of local and international initiatives.

- Archival Institutional Partner

- Local, regional, and national Jewish and non-Jewish archives and museums store synagogues' oral histories, family and temple documents, photos, videos, and artifacts.

- Cemetery Institutional Partner

- Local cemetery and burial association provides management and oversight.
- Absent such an association, a local synagogue's own cemetery association serves the same function.

- Spiritual Institutional Partner

- Synagogues without clergy support rely on congregants for lay-led services.
- If a synagogue dissolves, members still live in the area and need support.
- Stable synagogues, in the community or region, provide assistance, support, and pastoral care.

JCLP has five national partners:

1. [American Jewish Archives](#)
2. [JFNA and the JFNA Network of Independent Communities](#)
3. [Orthodox Union](#)
4. [Union for Reform Judaism](#)
5. [United Synagogue of Conservative Judaism](#)

Final Note

Whether you undertake a formal or informal planning process, the fact that you are addressing issues of utmost importance to your synagogue *counts!*

Honoring the Past

Chapter 2: Archives and Historical Documents

Introduction

Your synagogue has a unique story to tell through documents, artifacts, oral histories, photos, and videos, often located in your building. Current and past congregants might possess items that contribute to the historical footprint of your synagogue and local Jewish community.

Collecting, preserving, and donating historical records to Jewish museums and archives and/or to the state or local historical museum is important.

Be sure to interview congregants with institutional memory. Ask congregants to tell their children and grandchildren about boxes with photos, documents, and memorabilia, so they preserve these vital memories.

Also, you want to advise volunteers against throwing away board minutes, financial transactions, program flyers, and religious school and confirmation photos, since all are part of your legacy. Archivists recommend keeping such materials together, clearly labeled, in one place.

Congregations have uncovered and saved real treasures:

- Nineteenth-century hand-calligraphed sheet of Jewish liturgical music found in a basement and transferred to the American Jewish Archives
- Copy of a Chumash translated into seven languages, including Arabic, Aramaic, Persian, and German, discovered among books in a synagogue library and given to the library of Hebrew Union College–Jewish Institute of Religion (HUC-JIR) in Cincinnati

Fortunately, there are professionals who can help preserve historical materials. The Jacob Rader Marcus Center of the American Jewish Archives (AJA), located on the Cincinnati campus of HUC-JIR, has partnered with JCLP in helping congregations find permanent archival homes for their historical records. The AJA is impressive:

- largest freestanding repository dedicated solely to the study of the American Jewish experience
- over fifteen million pages of documents, audiovisual recordings, microfilm, and photographic images
- founded in 1947 by renowned historian Jacob Rader Marcus (1896–1995), who served as its director until his death at age ninety-nine

In 1998, Dr. Gary P. Zola became the AJA's executive director; he is a board-appointed member of the HUC-JIR faculty. Dr. Dana Herman, director of research and collections, is the AJA's current representative to JCLP's board.

Dana Herman, PhD

Director of Research and Collections

The Jacob Rader Marcus Center of the American Jewish Archives

3101 Clifton Ave.

Cincinnati, OH 45220-2488

Office phone: 513-487-3069

Email: dherman@huc.edu

In addition, check to see if there are other local Jewish and general history centers, archives, or museums to supplement the AJA.

Elements of Historical Preservation Process

What is of archival significance?

See appendix 1 for a list of items provided by the AJA. Most archives accept only print, photographic, or audiovisual material, rarely artifacts. This process may seem overwhelming, but rest assured that much of the sorting and cataloging will be done by professionals at the institution. Archivists often make site visits to help congregations get started and assist during the collection process.

Documents that are currently being used or may be referenced should *not* be transferred.

Who should receive this material?

The answer depends on where the original materials will go—the state or local Jewish archives or the AJA. Fortunately, many archives accept photocopies. Even if they do not receive material or copies, an inventory of the synagogue's holdings will be useful to researchers. The city or state archives will likely want one or two pieces that reflect the Jewish presence in their community. At times, the local university can be the locus for the Jewish material.

How is the material collected?

One volunteer (or a small group of volunteers) lists the documents in the synagogue. Examples, updated each year, include the following:

1. board minutes from 1951 to 2021
2. photos of past presidents
3. photos of confirmation class
4. flyers from synagogue galas

Have someone take photos and, if possible, video of the interior and exterior of the building.

Some congregations have scheduled “turn-in” parties where congregants bring documents or photos of archival significance based on a list of items needed. Congregations have even created Wikipedia pages for their synagogues.

What does an oral history interview involve?

The interviews should be with members who have institutional memory and/or with members who are from multi-generational families. The interview consists of four sections, which often overlap, covering the following:

1. family history
2. life experiences
3. interactions between synagogue and Jewish community
4. interactions with broader community where congregants record impressions and memories

What does an oral history interview reveal?

An oral history reveals the ethos of the Jewish community and its interaction with the broader community. In many communities, the Jewish presence was significant, with important Jewish merchants, elected officials, philanthropists, and arts patrons. Moreover, using the Anglo-Jewish press or local press to tell the story of your synagogue’s history is part of its archival record.

Is there a cost to collecting this material?

There may be shipping costs to the synagogue, as there is no guarantee that the designee will collect the material. If you decide to digitize records, speak to the archival organization about the cost of recording and transcribing interviews.

Benefits of Archival and Historical Preservation

Many congregations have published histories of their synagogues, often to coincide with anniversaries. This information is of crucial importance to historians and researchers, whether the study is at the micro (synagogue) or macro (relation of synagogue to local, state, and national themes) level. Provide videos and transcripts to the interviewees for their children and grandchildren, as a family as well as part of the synagogue legacy.

Respecting the past, honoring those who built and sustained the congregation, enjoying the memories of one’s childhood or family life or Jewish experience, and taking pride in the accomplishments of the synagogue are benefits that every member of the congregation can enjoy today.

Honoring the Past

Chapter 3: Artifacts

Introduction

It is never easy to decide which possessions to save and which to part with, whether in your home or synagogue. There are the gifts no longer used and items from families with memories attached. Discarding these might show a lack of respect, so people tend to put off any decisions, stalling for time.

For synagogues, assessing holdings is crucial, especially if downsizing, moving to a new location, or closing. It cannot be put off indefinitely. The time is *now*. Assign a few volunteers to take an inventory and record the information, allowing the board to make final decisions about what to save, what to send to an archive, and what to donate.

Steps in Assessment Process

Inventory

First, take a comprehensive inventory of everything in your synagogue, and put it on a spreadsheet. See appendix 2 for an inventory template. The inventory consists of three categories: (1) religious articles (Torah scrolls, eternal light, yad, Shabbat candlesticks); (2) memorial (Yahrzeit) plaques; and (3) archival documents (board minutes, photographs, anniversary books).

See the Archives section (chapter 2) for donating these items:

1. books
 - liturgical, such as siddurim (prayer books)
 - machzorim (High Holiday prayer books)
 - copies of Chumash, Bible, and Talmud
 - general books of Jewish and non-Jewish interest
2. artwork
 - paintings
 - sculptures
 - stained glass windows
3. equipment and furniture
 - *aron kodesh* (holy ark)
 - pulpit
 - pews
 - general items, such as tables, chairs, kitchenware

Photographs and Descriptions

Take photographs of items to be donated or sold, and compile a brief description of each, covering dimensions, provenance (i.e., source and history), use, and if applicable, price.

Torah Scrolls

For *sifrei Torah*, you may want to consult a *sofer* (Torah scribe), who is trained to evaluate, assess, and repair—as well as write—a Torah scroll. Some *soferim* serve as Torah brokers in the sale, rental, or donation of *sifrei Torah*. The *sofer* can determine the state of the Torah scroll and whether it is kosher or *pasul* (not kosher). If you are planning to sell or donate a Torah scroll, obtain a certificate of appraisal from a *sofer*.

Consider donating a Torah scroll to one of the following:

- new congregation
- congregation within your denomination
- congregation in your region or state
- congregation without a Torah or congregation that needs a second one for times when two *sifrei Torah* are used
- congregation in Israel or in a Jewish community around the world
- Hillel chapter or Jewish camp

If the Torah can still be used, do not donate it to a museum or local historical society. It is much better for a Torah—indeed, *any* Jewish artifact—to be used rather than sit on a shelf or in the basement of a museum.

Equipment, Furniture, Other Building Fixtures

The building's inventory holds as much nostalgia as the bricks and mortar, especially the memorial plaques, stained glass windows, or *aron kodesh*.

For assessment and evaluation of Jewish articles consult the following:

Elizabeth Kessin Berman, AAA

Certified Judaica and Personal Property Appraiser, Appraisers Association of America

P.O. Box 126

Nahant, MA 01908

Phone: 240-461-7452

Email: ask@judaicaincontext.com

Website: <http://www.judaicaincontext.com/>

Jonathan Greenstein, President and Appraiser

J Greenstein & Company, Inc.
417 Central Avenue
Cedarhurst, NY 11516
Phone: 917-797-0239
Email: jonathan@jgreenstein.com
Website: www.jgreenstein.com

Evan Blum, Owner

Email: evan@demolitiondepot.com
The Demolition Depot & Irreplaceable Artifacts™
216 East 125th Street
New York, NY 10035
Phone: 212-860-1138
Fax: 212-860-1560
Email: info@demolitiondepot.com
Website: <http://www.demolitiondepot.com/vo/demo/>

Irreplaceable Artifacts™

428 Main Street
Middletown, CT 06457
Phone: 860-344-8576
Fax: 860-638-0834
Email: info@irreplaceableartifacts.com
Website: <http://www.irreplaceableartifacts.com/>

Demolition Depot/Irreplaceable Artifacts brokers large items such as stained glass windows, pews, and prayer tables.

Art Appraisal

Arthur M. Feldman Judaica Gallery

465 Roger Williams Ave.
Highland Park, IL 60035
Phone: 847-748-8123
Website: <https://www.arthurfeldmangallery.com/>

Ask for assistance from local archivists and historians to assess what should be kept and what should be discarded.

Books

It is difficult to find homes for siddurim and machzorim; they are often outdated, and most Jewish institutions are not in need of them. If they cannot be donated, bury them in your synagogue's cemetery, perhaps with a memorial service. (See Alanna E. Cooper, "Saying Kaddish for a Rust-Belt Congregation," Tablet Magazine, January 8, 2019, [https://www.tabletmag.com/sections/community/articles/kaddish-for-a-rust-belt-congregation.](https://www.tabletmag.com/sections/community/articles/kaddish-for-a-rust-belt-congregation))

Books in your synagogue's library may be hard to donate. However, the local public or school libraries, assisted living or nursing homes, or even churches might want non-prayer books.

Here are some Jewish booksellers:

Jewish Book Council

520 8th Avenue, 4th Floor

New York, NY 10018

Phone: 212-201-2920

Fax: 212-532-4952

Email: info@jewishbooks.org

Website: <https://www.jewishbookcouncil.org/>

Ken Shoen and Jane Trigere (Massachusetts)

Website: <http://www.schoenbooks.com/>

Dan Wyman (Brooklyn)

Website: <http://www.danwymbooks.com/>

Zubal Books

2969 West 25th Street

Cleveland, OH 44113

Email: info@zubal.com

Phone: 216-241-7640

Fax: 216-241-6966

Website: www.zubal.com

Jewish Used Books

4801 Minnetonka Blvd

St. Louis Park, MN 55416

Phone: 773-510-4647

Email: orders@jewishusedbooks.com

Website: www.jewishusedbooks.com

General Items

Local churches, homeless shelters, and other social-welfare agencies are good sources for donating general articles. In addition to helping those in need, you are promoting good community relations.

Deciding When to Donate or Sell

The value of an artifact is as much determined by its emotional or historical sentiment as by its usefulness. In some instances, congregations offer to return objects to the families that donated them. Unless there is a contract to the contrary, these articles are the possessions of synagogues to retain or dispose of as they wish.

Jewish museums typically do not accept artifacts except for one or two items used as historical markers for congregations in the community.

If you decide to donate a Torah or other article, include a brief description of your synagogue (year of establishment, denomination, location). The recipient should display a plaque where appropriate or possible. In one community, the local Hillel made a special Torah cover embroidered with the donating synagogue's name. The donated item should be photographed for the archives. Sometimes, the donation is featured in the local Jewish or general paper. These donations are part of the congregation's legacy.

Honoring the Past

Chapter 4: Cemeteries

Introduction

If your synagogue is responsible for a cemetery, the first task of the legacy planning process is to develop a cemetery preservation plan. Often, synagogues assume that provisions have been made for perpetual care when, in fact, this is not the case. Further, leadership may not realize that the plans in place may not be operational in fifty years.

A cemetery plan has three major components:

1. adequate funding for a cemetery preservation endowment and an entity to manage it
2. entity responsible for management
3. entity responsible for Jewish oversight, in conformity with Jewish requirements as defined by the synagogue

Some cemeteries are owned by the synagogue. Others are separate 501 (c) 13 nonprofit corporations managed by the people who run the synagogue. Some cemeteries constitute a section of a larger Jewish or secular cemetery. Other cemeteries stand alone.

Unless the synagogue has absolutely *no* relationship to the cemetery—legal, financial, emotional—a cemetery plan must be part of the synagogue’s legacy plan. Even if a cemetery plan is unnecessary, the synagogue may still decide to allocate funds for its preservation.

In addition, there may be issues as to how a cemetery is set up legally to interface with state regulatory agencies. The congregation should seek legal advice about the future disposition of the cemetery.

Community Alliance for Jewish-Affiliated Cemeteries (CAJAC) provides consultation and information, as well as direct services. It represents the organized Jewish community’s consolidated efforts to preserve Jewish cemeteries and create permanent solutions for ensuring their long-term sustainability.

Community Alliance for Jewish-Affiliated Cemeteries (CAJAC)

c/o New York Board of Rabbis

171 Madison Ave. #1602

New York, NY 10016

Phone: 914-574-7057

Email: info@cajac.org

Website: <https://www.cajac.org>

Jewish Cemetery Association of North America (JCANA)

Website: www.jcana.org

- member organization of Jewish cemeteries
- information sharing, idea exchange, and problem-solving

JewishGen

Email: info@jewishgen.org

Website: <http://www.jewishgen.org/>

- volunteer organization committed to preserving information about Jews interred in cemeteries and memorialized on Yahrzeit boards throughout world
- database if congregation cannot find location for its memorial plaques
- resource for congregations to solve issue by building a structure on cemetery's property

Elements of Cemetery Plan

Assessment

The three steps of an assessment are as follows:

1. Collect essential information about the cemetery (see appendix 3 for a sample cemetery intake questionnaire).
2. Photograph the cemetery.
3. Gather tombstone information and enter it into JewishGen Online Worldwide Burial Registry (JOWBR).

See appendixes 4 and 5 for JewishGen templates for tombstones and for memorial plaques

Funding

A cemetery endowment should completely fund its annual maintenance cost. To ensure adequate funding, you may need to conduct a cemetery preservation campaign. Also, create a database of families with loved ones buried in the cemetery.

If a synagogue knows that it will be selling its building, due to relocation or dissolution, some or all of the proceeds from the sale may be available for transfer to the cemetery endowment fund. The sale of plots is also an income-generating vehicle; however, those revenues may be available only for a short time.

Management

Even if the synagogue has a cemetery committee, consider identifying a relationship with an institution that will take responsibility for the management of the cemetery, including the following:

1. contracting with the landscape companies
2. responding to emergency capital repair situations
3. overseeing liability insurance contracts
4. arranging for funerals and sale of plots

An active, not necessarily Jewish, local cemetery may be an option for taking over management of the cemetery.

A synagogue that closes before making these arrangements runs the risk of having its cemetery neglected or abandoned.

See appendixes 6 (Sample Cemetery Endowment Agreement with a Jewish Federation) and 7 (Sample Cemetery Endowment Agreement with a Stable Synagogue).

Oversight of Religious Guidelines

A person familiar with the Jewish guidelines defined in the synagogue's bylaws should inspect the cemetery twice a year. Put in place provisions to respond in the event that guidelines are not being followed. Communicate clearly about halacha (Jewish law) to the new manager about things such as cremation and interfaith burials.

Addressing the Present

Chapter 5: The Synagogue Building

Introduction

The synagogue's building carries highly charged emotions. Sometimes, it is the original and *only* structure to house the congregation. The current members' forebears had the vision, supplied the financial resources, and ran the facility from the very beginning. And if the building is on the historic register—and some have celebrated their centennial or sesquicentennial anniversaries—the feelings of attachment are even more intense.

Often, the synagogue has a unique design and was designed by a noted architect. Its fixtures may have aesthetic or financial value, such as an *aron kodesh* (holy ark), stained glass windows, and bimah furniture. The building may also be the tangible and perhaps *only* symbol of the Jewish presence in the community, of Jewish-Christian relations, and of the contributions the Jewish congregation made to the community.

Understandably, there are congregants who cannot even conceive of the sale of their building. They feel an obligation to their parents, grandparents, or great-grandparents who founded the congregation and erected the building and would feel guilty about selling it. They prefer to let the next generation make that wrenching decision.

For traditional congregations, there may be no other options in the immediate area because the building must be within walking distance for members to attend Shabbat and holiday services.

There are facts and realities of your current situation that must be addressed *now*:

1. Building capacity far outweighs the dwindling number of congregants.
2. The cost of maintaining the building, including liability insurance, outpaces revenue from membership.
3. Capital repairs—roof, HVAC, plumbing, mold, asbestos—require additional fundraising.
4. The building does not meet American with Disabilities Act of 1990 (ADA) standards for accessibility.
5. The building requires upgrades to meet the building code.
6. Congregants no longer live close by.
7. Congregants are elderly and unable to come to the building.
8. Virtual services enable congregants to stay home.

The cemetery could be another reason to sell the building. There may be a separate party or parties managing the cemetery. Perhaps congregational leadership doesn't know the financial situation of the cemetery, and sale of the building may be the only way to ensure a sufficient endowment for perpetual maintenance of the cemetery.

Some congregants say they will remain members *only* if the synagogue's building remains. Their affiliation is tied inextricably to the building. Other congregants have little emotional attachment to the building and would be willing to relocate if it meant sustaining the congregation.

For congregations considering merging, which synagogue building remains and which synagogue building is sold is often the contentious, "deal-breaker" issue.

Observations

Is the synagogue building-centric? Is the existence of the synagogue based on the retention of the building? Is the worth of one's membership tied to this particular synagogue building?

Or is the synagogue congregant-centered? Is a *kehilla* (community of members) of paramount importance, and home is whatever building is used—whether a stand-alone structure, a rented facility, or someone's house?

The following are the planning issues to address when considering preserving or selling your building.

Building Preservation

There are many reasons for deciding to preserve your synagogue's building, some overlapping, others sequential:

- ***Revitalization of Congregation***

Even if the building has to close due to lack of sustainable membership, leadership decides to preserve the building, hoping Jews will return to the community. An endowment is established to pay for the basic expenses to keep the building in good condition, covering utilities, landscaping, repairs, and liability insurance.

- ***Revitalization of Community***

Demographic projections may indicate an influx of people into the community—a history, university, new businesses or industries—which may attract Jewish families. Regional development may extend to a community with highway extensions. The congregation may want to keep the building, hoping to engage new members.

- ***Jewish Programming***

The building does not have a functioning congregation; however, it is rented for Jewish programming, such as music, film, and lectures, or to Jewish schools during weekdays and weekends.

- ***General Programming***

The building is rented for a range of programming—arts and culture, educational, social, weddings—since use for religious purposes other than Jewish events is precluded.

Preserving the building is based on finances and management:

- ***Finances***

The congregation may decide to launch a building preservation endowment campaign. The campaign, however, cannot take away from the annual fundraising elements (dues, High Holiday appeal, special initiatives) to keep the synagogue solvent. Either a volunteer or a paid professional manages the fundraising effort and marketing materials. The fundraising goal probably needs to be a minimum of \$500,000, with a maximum of several million dollars. Since the majority, if not all, of the funds will come from the congregation, past members, and families of members, the goal-setting process should be realistic and achievable. If pledges are accepted over a two- to five-year period, consider securing a loan, which will also place an additional financial burden on the congregation.

The basic endowment must be of a size with an annual return sufficient to fund maintenance, capital repairs, insurance, and other expenses. The endowment will need to be much larger if the funds will also need to cover programmatic components (staff, publicity, equipment).

The building may also be rented in whole or part, with the rental income used for operations and/or increasing the principle of the building endowment.

A financial institution will manage, invest, and distribute funds in the endowment. Depending on the community, that institution may be a Jewish federation or a Jewish foundation.

- ***Management***

With members of the Jewish community still living in the area, management of the building can conceivably be done by volunteers. This is not ideal, due to the unpredictability of volunteers.

A city government, an arts and culture organization, or even a historical society or civic organization may agree to take over management, but only if the building can serve their needs; moreover, they will require all funds to be in place before they commit to providing management and oversight services.

Sale of the Building

It is possible there are restrictions on the use of the property and/or building, limiting the options for the real estate agent engaged to sell the building. At times, congregations determine their own restrictions. Examples may be not selling the building to a church or not agreeing to a sale that would result in demolition.

(Chapter 7, on legacy endowments, addresses the use of the proceeds of the sale of the building for philanthropic purposes.)

If the congregation plans to stay active as a faith-based institution, then the proceeds from the building sale will sustain the congregation. Funds can be used to rent a smaller facility, hire clergy, or increase the clergy's time spent with the congregation. Funds will likely remain, and a synagogue trust can be established for operations, programming, and philanthropy.

A synagogue should prepare a financial forecast to determine whether the congregation will remain solvent, even if it plans to supplement its rental or other expenses with funds from the building sale. If, for example, the expectation of solvency is based on outreach and new members, this goal must be realistic, or eventually the synagogue trust will be depleted, and the congregation could face dissolution. The congregation should seek legal advice before taking major steps to alter, rent or sell the building.

Conclusion

Whether your synagogue decides to preserve or sell its building, it needs to engage in a thoughtful process. Sometimes it is helpful to bring in an outside, objective facilitator. Emotions cannot be ignored, but neither can data. The building should not be a wedge within the congregation. Synagogues have lost members due to contentious arguments about the current building or plans to move to a new facility. How ironic it would be if *shalom bayit* (peace within the home) is damaged by the *bayit* (building) itself!

Addressing the Present

Chapter 6: Sustainability

Introduction

When you hear that a congregation wants to be sustainable, what comes to mind?

You might think of a thriving congregation, with members highly engaged in exciting synagogue life. It is meeting the needs of its congregants and inspiring others to join and become active. It is financially viable, provides quality Jewish experiences, and strengthens Jewish identity.

A congregation can be sustainable with a membership of three hundred or thirty. The future demographics of a congregation may be questionable—the membership is aging, and there are no new members. But if the synagogue has strong leadership and satisfied, engaged congregants, the congregation is sustainable, at least for now. Sadly, many small congregations have no succession plan. Their presidents often serve for many years because no one is willing to take the position.

Sustainability has a financial component.

Ask these four questions:

1. Is there enough revenue to meet expenses?
2. Can the congregation afford to attract and retain clergy?
3. Can the congregation raise additional funds if there are capital repair problems?
4. Do financial forecasts show a steady stream of income or diminishing sources of funding?

While finances are a very real concern, this chapter covers the key element to the vitality of the synagogue: its *people*.

As membership ages and the numbers decline, more of the responsibilities of synagogue life fall to fewer people. Even with stable membership numbers, congregations are challenged by decreasing numbers of attendees and volunteers. This is not just a small-congregation phenomenon. Congregations of *all* sizes and demographics have to address the membership engagement issue.

Given the demographic realities of congregations, it is more important than ever that the synagogue connect in meaningful ways with *every* congregant. This personalized attention will serve as the most significant indicator of the health, if not the longevity, of the congregation.

This chapter assumes that there is no spiritual leader or professional staff person. The sustainability of the synagogue rests on the will of the lay leadership. This chapter does not address outreach, since outreach is only as effective as “in-reach” to the synagogue’s congregants. Moreover, leadership’s emphasis on outreach may be unrealistic and its goals unattainable, which may detract from the more pressing priority of focusing on the synagogue’s membership.

Getting Started

Once leadership agrees to undertake revitalizing the congregation, the president recruits a team of four to six people to drive the process. This team is critical to the success of the process. They typically are the “doers,” with the skills, temperament, and love of the synagogue to be the next leaders. This team is *not* responsible for the governance of the congregation. Its focus is on the engagement of congregants and keeping them connected to the synagogue.

Leadership may engage an outside facilitator to work with the team in developing the strategies and implementing a membership engagement/retention plan.

Knowing Your Congregants

Leadership can take steps to know the following about their congregants:

- personal lives
- families
- past involvement in other communities and synagogues
- interests, values, needs
- attitudes and opinions about the synagogue
- what they are most proud of
- what frustrates them
- what is of most concern at this stage in their lives

Why should the synagogue take the time to listen and learn? Because even if congregants choose *not* to participate in activities or services, knowing that their synagogue truly *cares* about them will build loyalty. And it lets many congregants, at a fragile stage in their lives, know that they are not alone and that their synagogue can add meaning and purpose.

Surveying the Congregation

Leadership may decide to conduct surveys to help make decisions about keeping or selling the building, conducting a capital campaign, and/or increasing or decreasing clergy services. In this case, however, the purpose of the survey is to assess the congregation's attitudes about the synagogue. Key questions relate to religious services, programs and activities, and things to be changed or improved. See appendix 8 for a sample congregation survey.

Interviewing Congregants

The key to the sustainability plan is to interview every congregant. Building on the general survey, the individual interviews have three components:

1. personal information
2. attitudes about the synagogue
3. attendance and volunteerism

Interviewers should ask if the interviewees know of any friends or acquaintances who might be interested in the synagogue's programs and services.

Interviews take forty-five minutes to over an hour, not because of the number of questions, but because the congregants are grateful for the opportunity to share their lives and perhaps unburden themselves. The success of this process often validates the creation of a membership committee that meets at least once a year to reach out to congregants. See appendix 9 for a sample congregation personal interview sheet.

Increasing Participation

The personal interview process will identify synagogue programs where congregants have identified an interest, skill, and even a willingness to attend or help. Their involvement may be episodic or a one-time volunteer assignment. A congregant may have an idea for a program. If appropriate, that congregant will be given the go-ahead to plan the program. A congregant may not be well enough to attend a program but is able to make phone calls or address envelopes. A congregant may not want to volunteer alone; however, bringing in friends, even if nonmembers of the synagogue, may motivate the congregant to attend or volunteer. Recognition of time given to the synagogue, expressions of appreciation, and support from leadership strengthen the bonds between the congregant and the congregation. Virtual technology has made it possible for members with physical limitations to participate via Zoom and for the reengagement of former members.

Being Realistic

Relationship building takes time and effort. No matter how much personal attention you give each congregant, the major responsibilities are accepted by the few. In many cases, they work as a team to share the basic tasks of running the synagogue. But if those few people are no longer able or willing to continue with their responsibilities, then the existence of the synagogue is at risk. Some congregations decide to dissolve when the president steps down because no one is willing or able to take the president's place.

Sometimes difficult decisions need to be made about the scope of services a synagogue can offer based on available volunteers. For example, Shabbat services may be scheduled once a month instead of weekly, or holiday programs may be offered only if volunteers organize them.

Bringing Hope

For a small congregation, barely making a minyan at Shabbat services or having a handful of people attending a book club program or second Seder may seem like a sign of decline. But the percentage of those in attendance to the congregation as a whole may actually be higher than in larger congregations. Moreover, diverse programming may attract a larger percentage of the overall congregation than that of a larger congregation.

Information from personal interviews, together with a functional, current database, is critically important and will help determine which programs may attract the most people and how frequently and at what times they should be offered. The data may even validate a range of programs that don't rely on attendance numbers but rather on consistency of participation.

The process can also result in a leadership succession slate and a reconstituted congregation table of organization with team leaders and team members identified by and recruited from the interview process. The organizational structure needs to be streamlined, with leadership, governance, and membership teams as the top priorities. See appendix 10 for a sample congregation table of organization.

Sustainability: Will of the Congregation

It is a reality of congregational life that people more often than not do not step up to take on tasks. Often, they intend to attend services or a program but don't. They resent going under obligation and don't want to be in a place where they feel inadequate—for example, they can't read Hebrew. Or they have other priorities, can't attend, or just aren't interested.

But if congregants know that the existence of their congregation depends on them, they want it to survive, and they are appreciated and informed and listened to, they will be more inclined to participate and engage in congregational life.

The will of the congregation is a reflection of the attention and respect paid by leadership. It really comes down to a simple human need. An effective strategy to keep current members engaged and reach potential new members is key.

It is challenging to devote many hours to one's congregants. Making the commitment, though, will add years to and will enhance the quality of the life of the synagogue. This could be the most important decision a synagogue's leadership ever makes.

Shaping the Future

Chapter 7: The Synagogue's Legacy

Introduction

For some congregations, contemplating the synagogue's legacy is uncomfortably close to the possibility of dissolution. (See appendix 11 for trigger conditions for closure.) That may be the reality. Membership is declining, the congregants are aging, and there are few or no new members. Avoiding plans for closure can raise questions. What happens to the *sifrei Torah*, the building, the official papers? How should clergy and staff members be treated? How these issues are resolved will determine the synagogue's legacy.

For other congregations, though, if the issue of legacy is raised, the reaction is "We're not shutting down." That may well be fine for now, but if the demographics are not in the congregation's favor, the issue eventually must be faced.

But even those congregations confident of a stable future find value and purpose in considering their own legacies.

Contemplating your synagogue's legacy produces a range of emotions. Some choose to deal with it directly, while others prefer to leave it to the next generation of leaders.

What is so important about legacy?

A synagogue's legacy is a reflection of its values, accomplishments, and contributions to the Jewish and general communities in which it flourished. It is a history of the people who founded the synagogue and labored to bring Jewish life and experiences to generations of members.

Legacy, however, is not just a remembrance of Jewish things past. A congregation can allocate its resources based on these values and perpetuate its legacy through the institutions and people who benefit, year after year, from its philanthropy. Its impact can be felt in Jewish continuity, Jewish education, social welfare services, and general education.

It is more valuable for a congregation to undergo a legacy process while there are supportive and engaged people still involved. They may have family ties going back generations. Take action *now*, before natural attrition or movement away signals a more precipitous decline.

It is also an opportunity to extend the legacy of the congregation by involving children and grandchildren, if only to keep them informed and inspire them to support the legacy endowments.

The deliberations and decision-making that result from legacy plans can be a source of pride for the entire congregation.

Legacy Planning Process

The material in chapter 1, “The Planning Process,” outlines the steps in developing the synagogue’s legacy plan. Note that the chair and committee appointed for the planning process are responsible for the legacy plan. The board and congregation are kept up to date on the progress. The legacy plan is approved by the board and most likely by the congregation’s membership.

Jewish Community Legacy Project (JCLP) assists congregations in the legacy planning process:

Jewish Community Legacy Project

Email: info@jclproject.org

Website: www.jclproject.org

There are four components in a legacy plan:

1. cemetery endowment, if applicable
2. historical material and archival documentation
3. Jewish and general articles and artifacts
4. legacy donations and endowments

The details of the first three have been addressed. This chapter covers the legacy components for each and provides additional details.

The legacy plan outlines the process for the donation of the synagogue’s material and financial assets. Typically, the disposition of assets occurs once the congregation votes to dissolve, after all financial obligations have been satisfied. However, some congregations decide not to wait until closure. For example, one congregation’s legacy plan included the establishment of a scholarship endowment for local high school students. Rather than wait until the synagogue closed and the endowment was established, they decided to make an annual donation of \$500 for a scholarship in the synagogue’s name. Then, if and when the synagogue closed, the permanent endowment would be established, continuing to provide a \$500 scholarship. They made the decision to create a living legacy.

Jewish and General Artifacts for Legacy Donation

It is important to take an inventory of artifacts in the building, Jewish and general, to be catalogued:

- religious articles, including *sifrei Torah* and Holocaust Torahs
- memorial Yahrzeit plaques
- archives

- artwork
- books
- equipment and furniture

The congregation needs to keep a list of all donated articles and their recipients, an important archival record.

Family Donations

For any article (memorial board, donor board, stained glass window, pews) that has a plaque commemorating an individual or family donor, if it can be removed, the leadership should seek advice from the family as to where these items may be donated.

The leadership may also decide to offer donated articles to family members. In the case of *sifrei Torah*, family members may want to have the Torah donated to another congregation of their choice, perhaps where they or their children or grandchildren are currently affiliated.

Archival Material

The archival material, mentioned in its own chapter, will be sent either to the American Jewish Archives and/or to regional and local Jewish archives. Some representative material may also be given to the local historical center to memorialize the congregation in the community.

Equipment and Furniture

Equipment and furniture that do not have a specific Jewish use will be donated to other synagogues or to local churches and social welfare organizations. Some synagogues have yard sales where community institutions come to inspect the items. In a few cases, an estate auctioneer is hired to dispose of articles. Acknowledgments and letters of appreciation are saved for archival purposes.

Judaica

Synagogues normally do not sell their Torahs unless they need the funds for the cemetery endowment or for current operations. If they choose to donate, the beneficiaries most likely have a personal connection to the congregations.

When donating a Torah, consider the following options in the decision-making process:

- new congregation
- new congregation or an existing congregation affiliated with the same denomination
- congregation in your region or state
- congregation without a Torah or congregation that needs a second one for times when two *sifrei Torah* are used

- congregation in Israel or in a Jewish community around the world
- Hillel chapter or Jewish camp

The other Jewish articles (eternal light, shofar, Havdalah candles, bimah furniture) will also be offered to Jewish institutions, often through national movements, on the JCLP website or Facebook page, or through local federations. The beneficiary congregation could memorialize the donor congregation with a plaque or physical inscription.

It is usually the responsibility of the recipient organization to pay the shipping charges. They also are asked to acknowledge the donation and the synagogue in their communications.

Cemetery Legacy Endowment

A cemetery endowment requires funds to cover annual maintenance costs, including capital repairs. Often the cemetery is under the perpetual care of a larger cemetery where the synagogue has its own section. The congregation, in that case, may just be required to have enough in its endowment to cover the expenses that are not the responsibility of the host cemetery, such as repairs to walkways, fences, monuments, and tombstones.

If the synagogue or the synagogue's cemetery association does not have funds independently invested for a cemetery endowment, then the congregation has to raise funds, either through a separate campaign or from the proceeds of the sale of assets, such as the synagogue building.

This project cannot be delayed for a future synagogue leadership to tackle. Those most passionate about the cemetery are usually the elder congregants, some potentially major funders of the cemetery preservation endowment campaign. The lay committee driving the campaign, among whom are the major donors, are those with institutional memory. They can help develop a database of family members to be contacted and solicited and help handle solicitations. See appendix 12 for a sample solicitation letter to major donors. A revised version can be sent to the rest of the prospects.

Another advantage of starting the campaign early, while ongoing maintenance is funded out of the synagogue's or the cemetery association's budget, is that people can pay their pledges over a multiyear period.

Moreover, appeals can be made to congregants to make arrangements for testamentary gifts to support the congregation's legacy endowments.

The list of donors, with the appropriate attribution, is memorialized as part of the congregation's archival record.

In addition to a cemetery endowment, a provision can be made for the use of funds from a general endowment the congregation established. If there is a major expense that cannot be covered by the cemetery fund, this fund can be used.

Legacy Donations and Endowments

Note: this section refers to *non-cemetery* legacy endowments. See appendix 13 for examples of legacy endowments.

One-Time Donations

A donation is a one-time disbursement to a charitable or educational organization. These donations are designed to recognize or thank the organizations, both Jewish and non-Jewish, for their assistance to the synagogue or their service to the community in which the synagogue was located. The total amount of these donations should still allow the synagogue to allocate ample funds for legacy endowments.

Legacy Endowments: Principal and Interest

A legacy endowment is a perpetual donation; the principal is invested, with returns allocated annually to the organizations the synagogue selects. The congregation, in consultation with its financial institution, approves a spending policy based on the income on the total assets calculated at the end of the fiscal year. Distributions are usually made once a year.

It is a misconception that only large endowments are significant and that it's better for a synagogue with fewer assets to divide up its assets and distribute them as one-time donations. Even if an endowment is \$30,000, the annual distribution will still yield a material gift every year, such as a donation for scholarships or the local food bank.

These endowments operate indefinitely. Over many years, the recipient organizations receive cumulatively sizable sums that help hundreds of people. There is no more tangible way for the organization's legacy to be remembered and preserved.

Legacy Endowments: Financial Institutional Partner

The selection of the financial institution responsible for investing, managing, and distributing the legacy endowment funds is an important decision. The synagogue expects high rates of return on investments, excellent customer service, and competitive fees to ensure that the annual grants help the most people and have the greatest impact on the beneficiaries of legacy endowments.

The synagogue should engage either a Jewish federation or a Jewish foundation. Its investment performance is equal to or better than other financial institutions. The federation or foundation can inform synagogue leaders of emerging needs in the community for their funding consideration. Moreover, the federation or foundation is not just a service provider; it also reflects the Jewish values of the synagogue and, so to speak, has a "Jewish eye" over annual distributions.

Synagogue leadership should interview the institution(s) interested in managing their legacy endowments. The partnership between the synagogue and the institution is based on trust, confidence, and mutual respect.

The institution(s) should make a presentation and distribute materials to synagogue leadership describing all aspects of the endowment process. The synagogue may wish to seek legal or financial advice for the document review.

During the presentation, the financial institution should address five issues:

1. investment process and performance
2. costs to the synagogue
3. leadership role, with representation on the legacy endowment advisory board that oversees the fund in order to review and select investment options
4. reporting procedures
5. institution's liaison to the congregation

Legacy Endowments: Charitable Options

The selection of legacy endowments may be based on the following:

1. congregation's historical connection to organizations
2. identification with certain causes
3. desire to leave its charitable footprint in community
4. commitment to Jewish values supportive of Jewish continuity, beliefs, and practices; social welfare and social justice; State of Israel; Holocaust education; factors identified by the congregation

The synagogue creates one endowment or several, divides the funds equally or disproportionately, and specifies beneficiaries or changing beneficiaries annually.

The beneficiaries publicize the legacy endowments in their communications and at public functions, such as the annual awards ceremony at the local high school whose scholarship bears the synagogue's name.

And what is the end goal? Donors and foundations live on through their philanthropy. So, too, do synagogues that honor generations of members who made it possible for these legacies to endure.

Conclusion

A Final Thought

Consider taking a break from the daily activities of your synagogue at a board meeting to reflect on the history of the congregation, the values that define the synagogue, and the everlasting impact that the synagogue can have in the Jewish and general communities. The past and the future could change the course of the present.

Determining the synagogue's legacy at any stage in the congregation's life can be a bonding experience. As one congregant said, "It is a source of inspiration, a validation of who we are, and what, through our legacy, we will choose to be."

Testimonials

Here are a few anecdotes from congregations' planning experiences with JCLP:

- During its planning process, a congregation learned that it had never incorporated as a faith-based nonprofit. It quickly engaged an attorney and filed papers with the state. As the president said, "If nothing else, correcting this major problem made the entire process worthwhile."
- The congregation had just voted to dissolve. A long-standing member said at the conclusion of deliberations, "I went to the meeting expecting to be depressed. Instead, I am leaving inspired because of all the good that will be done forever (!) in the name of the congregation."
- The president of the congregation requested planning assistance. "I had initially intended to reach out to you, but we were just not ready." That was ten years ago! "We are now prepared to think about our future and make the important decisions for the future of our congregation."
- About twelve years ago, the temple agreed to begin a legacy planning process in anticipation of the need to close because its membership was aging, dwindling, and no longer active. But the president had a vision: to create a Jewish museum and Holocaust center. No one thought that it could be done. But he persisted and raised money for a new wing. Today, the museum is an important part of the city's cultural heritage, and the synagogue has even welcomed new members. There are no plans for it to close.
- Two congregations manage one cemetery. They realized that they needed to raise money to ensure its preservation. The leadership was committed to raising the funds for a cemetery preservation endowment. In twelve weeks, they raised over \$500,000, ensuring that the memories of their loved ones would be honored.

- A congregation recognized its bleak demographic future and decided to sell its building. But the leadership's spirits were lifted when they realized how much good the endowment established from the sale could do to perpetuate the memory of the synagogue.
- The synagogue had no leadership succession plan. The president recruited five people to constitute a long-range planning committee. The committee interviewed every congregant. The congregation was appreciative that the leadership took the time to meet with them. As a result, some agreed to volunteer, one of the six committee members became chair of membership, and the other five agreed to serve as the next slate of officers. Why? They recognized that the synagogue needed them, but equally as important, working as a team made it easier for them to accept leadership responsibilities.
- A synagogue in the Midwest donated a *sefer Torah* to a Hillel in the Northeast. The Hillel director told the chair of the synagogue's legacy planning committee that they did not open the Torah until the beginning of the semester, when the students were back. When they finally read from the Torah on the first Shabbat of the school year, the director said, "It was as if the spirit of your congregation was with us during this moment."

Your congregation will have its own treasury of unique and memorable experiences. It will face its challenges head-on and make the *right* decisions in the best interests of membership. That is not just the hope and prayer of leadership; it is their commitment to follow through the planning process so that this prayer becomes a reality.

L'dor v'dor

From generation to generation

About the Jewish Community Legacy Project

JCLP brought together small U.S. congregations to exchange ideas, share information, address common issues, and collaborate on programs. The purpose of these regional cohorts is to enhance the Jewish experiences of the congregants, strengthen individual congregations, and create a sense of community among participating shuls. Should you wish to use this model, we stand ready to help!

Jewish Community Legacy Project (JCLP)

Email: info@jclproject.org

Website: www.jclproject.org

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Archives and Historical Documents

Appendix 1: American Jewish Archives List of Accepted Transfers

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Appendix 2: Inventory Template

Cemeteries

Appendix 3: Cemetery Intake Questionnaire (CAJAC)

Appendix 4: JewishGen Online Worldwide Burial Registry (JOWBR) Tombstones Template

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Appendix 6: Sample Cemetery Endowment Agreement with a Jewish Federation

Appendix 7: Sample Cemetery Endowment Agreement with a Stable Synagogue

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Appendix 10: Sample Congregation Table of Organization

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Appendix 11: Trigger Conditions for Closure


Appendix 12: Sample Solicitation Letter to Major Donors for a Cemetery Preservation Campaign (a revised version can be sent to the rest of the prospects).

Appendix 13: Legacy Endowment Examples

Appendix 1: American Jewish Archives List of Accepted Transfers

Steps to Assist the Congregation in Transferring Records to the AJA

The Jacob Rader Marcus Center
of the
AMERICAN JEWISH ARCHIVES



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Winter 2020

The Jacob Rader Marcus Center of the American Jewish Archives (AJA), (www.AmericanJewishArchives.org) located on the historic Cincinnati campus of Hebrew Union College-Jewish Institute of Religion, is committed to preserving a documentary heritage of the religious, organizational, economic, cultural, personal, social and family life of American Jewry. The AJA possesses the largest cataloged collection in the world of papers and records of American Jewry and is an internationally known center of re-search in American Jewish history.

The AJA's founder, Dr. Jacob R. Marcus, wrote in his founding statement for the AJA that "so much of American Jewish life has been, and still is, reflected in the synagogue...synagogal records constitute one of the most important sources the scholar can hope to secure."

For that reason, chief among the AJA's holdings are records of local communities and organizations, and particularly synagogues. The AJA holds the largest collection of American synagogue records anywhere – from every movement and observance of Judaism and from every region of the United States. The AJA is always looking to add to these holdings and encourages local communities – especially those who are unable to care for their records – to consider preserving them here.

Don't permit history to be lost!

Located on the Cincinnati campus of the
HEBREW UNION COLLEGE - JEWISH INSTITUTE OF RELIGION
Cincinnati • New York • Los Angeles • Jerusalem
www.americanjewisharchives.org

Steps to Assist the Congregation in Transferring Digital Records to the AJA

- 1) Contact Dr. Dana Herman, Director of Research and Collections, at 513-487-3069 or by email at dherman@huc.edu.
- 2) The AJA will send an email with a link to upload files to our Dropbox account.
<https://www.dropbox.com/request/VjAJaM3sh4qkkDeU8dAZ>
- 3) Upload the digital file along with a completed Record of Event form.
- 4) Please contact us if you receive an error message or require further assistance.

Steps to Assist the Congregation in Transferring Records to the AJA

- 1) Contact Dr. Dana Herman, Director of Research and Collections, at 513-487-3069 or by email at dherman@huc.edu.
- 2) Dr. Herman will work with the congregation to establish a “contact archivist” to assist the congregation on steps listed below.
- 3) Determine where all of the records of the synagogue (and associated committees, institutions, and organizations) are kept.
- 4) Evaluate the records and make a general listing of the types of records based on the following categories:
 - A) Records relating to the establishment of the Synagogue/Congregation
 - Include historical and legal documents
 - B) Subject files of officers and administrators
 - Include correspondence and internal memos (including emails), reports, and working papers. Records and papers that document growth, change, new initiatives, and controversial matters
 - C) Membership Records
 - Include records of life-cycle events
 - D) Annual Reports
 - E) Committee Reports
 - F) Selected Project Files
 - Includes records about fund-raising activities/initiatives but NOT actual ledgers, checks, or business records.
 - G) Publications
 - H) Programs & Public Relations Materials
 - Include brochures, press releases, and other promotional materials
 - I) Photographs & Media
 - Include both interior and exterior photographs
 - Include audio/audiovisual material as well as digital photos and film
 - Try to identify date, event, persons, location, etc.

Records that should NOT be evaluated or listed to be sent to the AJA:

- Artifacts, prayer books, Torah scrolls, museum pieces
 - All business records, checks, copies of checks, invoices, bills, etc.
 - Any records that are considered “active”—i.e., records that are still in use by the rabbi, the congregation board, or other personnel
 - Any records that relate to the day-to-day activities that would not be historically valuable—i.e., operations documents, security records, phone logs
- 5) Identify which records will be sent to the AJA and whether the records will be copies or originals.
 - 6) Work with the “contact archivist” to complete gift agreement.

- 7) Determine how the records will be sent to the AJA and how they will be packaged and shipped.
- 8) Ship records to the AJA.
- 9) AJA will acknowledge receipt of records.
- 10) AJA will process records and create a finding aid which will be posted on the AJA website (the time frame of this step is dependent on the size and scope of the records).

Please note that depending on the complexity and size of the collection of documents/records of the congregation, the AJA may send an archivist to the congregation to evaluate the records.

The Jacob Rader Marcus Center
of the
AMERICAN JEWISH ARCHIVES



Record of Event

CONTACT NAME:

(PLEASE PRINT)

LAST / FIRST / MIDDLE

DATE: _

E-MAIL ADDRESS: _

NAME OF EVENT: _

DATE OF EVENT: _

MONTH / DAY / YEAR

OFFICIATING RABBI / CANTOR: _

CONGREGATION: _

ADDRESS: _

The following optional information will help in processing the record.

SERMON TITLE: _____

PARTICIPANTS: _____

SUBJECTS: _____

Please address any questions to:

aja-ref@huc.edu

or by mail to

The American Jewish Archives
3101 Clifton Avenue, Cincinnati, Ohio 45220

Appendix 3: Cemetery Intake Questionnaire (CAJAC)

Community Alliance for Jewish-Affiliated Cemeteries Congregational Cemetery Questionnaire

Please record your responses on a separate page.

General Information

1. Does your Congregation presently own and/or operate its own cemetery? If yes, please answer the following:
 - a. Where is the cemetery located?
 - b. Do you share the cemetery with other Congregations or Jewish organizations?
 - c. What is the approximate size of your cemetery (acreage)?
 - d. How many graves (used and unused) are located in your cemetery? If known, how many graves remain unsold?
2. If you answered no to question 1, please indicate if your Congregation has grounds (i.e., a section) at another cemetery?
 - a. Please provide the name and location of the cemetery.
 - b. How many graves (used and unused) are located in your section? If known, how many graves remain unsold?
 - c. What, if any, maintenance agreement, do you have with the host cemetery?

Oversight and Governance

1. Do you have a committee which oversees the cemetery?
 - a. What is the committee's role?
 - b. Is there a designated individual who signs burial permits?
2. Do you maintain a separate operating account for the cemetery?
3. Do you have a liability policy which covers the cemetery?

Income and Expenses

1. What is the average number of graves sold over the last three years?
 - a. What is the cost per grave?
 - b. Do you sell and/or collect perpetual care?

Maintenance

1. How would you rate the overall condition of your cemetery?
 - a. What improvements—esthetic and structural—need to be made?
 - b. Please list any recent improvements or capital repairs recently completed.
2. Is your cemetery maintained by an employee (caretaker) or by an outsourced company?

Please provide any additional information which might be relevant.

Appendix 4: JewishGen Online Worldwide Burial Registry (JOWBR) Tombstones Template

A	B	C	D
Field Name	Please enter your info here	Instructions	Examples
Cemetery Identification:			
Cemetery Name		The formal name of the cemetery. For many East European cemeteries, the cemetery has no formal name, so this field can be left blank.	"Beth Israel Memorial Park" or "Woodland Cemetery".
Landsmanshaft / Section Name		Name of Landsmanshaft (immigrant organization), or other burial society / fraternal / synagogue organization that owns plot. Leave blank for smaller cemeteries, those cemeteries not divided into smaller plots, and those cemeteries without formal names.	"First Pinsker Benevolent Society", "Chevra Ahavas Achim Anshe Kushnitz", "Independent Opoler Benevolent Association", "Erster Samborer Kranker Unterstutzung Verein".
Cemetery Location:			
Country		Name of country where cemetery is located. Use the modern name of the country where the cemetery is located today.	"USA" or "Poland".
City		Name of city where cemetery is located. For USA & Canada, follow name of city with a comma & the state/province postal abbreviation. For Europe, use "modern" town name and follow the standard locality naming conventions used in the JGFF database.	"Chicago, IL" or "Pinsk".
Street / Address		The location of the cemetery within the city.	"Clyde Street" or "Off Route 30".
Region		For Eastern European countries only. To determine correct region, please use the JewishGen Communities Database at: http://www.jewishgen.org/Communities/Search.asp	
USBGN Code			
Donor Information:			
Your full name		The name of the person donating this information.	
Your email address		Email address of the person donating this information.	
JGFF Researcher ID #		JGFF Researcher ID of the person donating this information.	"33222" or "12345".
Date of this submission		Date submitted to JewishGen	
Have you submitted a Donor Agreement?		You need only submit 1 agreement for all your submissions. You can download a form at: http://www.jewishgen.org/databases/Cemetery/working/donor.htm If you already have an agreement on file, please enter "On File".	
Cemetery Details:			
Number of Burials		Number of Burials in this cemetery	
Number of Photographs		Number of Tombstone Photographs you are submitting with this spreadsheet.	
Number of Attachments		You may submit longer cemetery descriptions, maps, gate, and overview cemetery photo files along with your submission. Please limit general photos files to 2-3 files.	
Cemetery Description		Other information about this dataset. Might include the cemetery office's address and phone number, the name of the book which provided information (full bibliographic citation), the name(s) of the providers/transcribers of this data, notes on the history	
Notes / Instructions		Instructions from the submitter to the JOWBR Project Team, regarding the data, permissions issues, transmission of photographs, etc., etc. (This field will not appear in the public display of this record).	
Landsmanshaft Info:			
Landsmanshaft Town / Country of Origin		Name of landsmanshaft's town of origin (if Landsmanshaft Name entered above in "Landsmanshaft/Section Name). Format as "TownName, CountryName", using the modern town and country name.	"Pinsk, Belarus", "Kuznica, Poland", "Opole, Poland", "Sambor, Ukraine"

Appendix 5: JewishGen Memorial Plaques Template

For detail instructions, please: http://www.jewishgen		
Field Name	Please enter your info here	Description of Column B Fields
Synagogue / Institution Identification:		
Synagogue or Institution Name		Name of the synagogue / institution where the plaques currently are housed.
Former Synagogue or Institution Name		If the plaques were originally at another synagogue / institution, the name of the former synagogue / institution. (Include a description of the plaques' movements on line 23.)
Synagogue / Institution Location:		
Country		Name of country where the current synagogue / institution is located. Use the modern name of the country where the synagogue / institution is located today.
City		Name of city where synagogue / institution is located. For USA & Canada, follow name of city with a comma & the state/province postal abbreviation. For Europe, use "modern" town name and follow the standard locality naming conventions used in the JGFF database.
Street / Address		The building number and street location of the synagogue / institution within the city.
Region		For Eastern European countries only. To determine correct region, please use the JewishGen Communities Database at: http://www.jewishgen.org/Communities/Search.asp
USBGN Code		For JewishGen Staff
Donor Information:		
Your full name		The name of the person donating this information.
Your email address		Email address of the person donating this information.
JewishGen Researcher ID #		JewishGen Researcher ID (JGID) of the person donating this information.
Date of this submission		Date submitted to JewishGen
Have you submitted a Donor Agreement?		Please complete the online Donor Agreement at https://docs.google.com/forms/d/e/1FAIpQLScqSUW3Jk2DX_EBFXZ2VhRqBKvpPNlbh5t2C8w7mU9F57ONPA/viewform
Synagogue / Institution Details:		
Number of Records (Individual Plaques)		Number of records
Number of Photographs		Number of records with photos on this spreadsheet.
Number of Attachments		Overview photos, synagogue sanctuary or external street photos, or other descriptive documents.
Synagogue / Institution Description		You can use this space to add history, descriptions, credits to volunteers, contact information for researchers to contact, websites, etc. for the current synagogue / institution. This field will become a public field.
Notes / Instructions		Instructions from the submitter to the Memorial Plaques Project Team, regarding the data, permissions issues, transmission of photographs, etc., etc. (This field will not appear in the public display of this record).

For instructions on how to complete this spreadsheet, please see
<http://www.jewishgen.org/databases/Memorial/Submit.htm> >

Appendix 6: Sample Cemetery Endowment Agreement with a Jewish Federation

Memorandum of Understanding

Legacy Congregation of City, State (herein after referred to as “the Temple”), and the Commission on Cemetery Preservation, a supporting foundation of the Jewish Federation (herein after referred to as “the Commission”), do hereby execute this Memorandum of Understanding to clarify and confirm Commission’s consultative role as a successor entity available to answer queries and offer referral assistance to Burial Park and Funeral Home.

Section 1. The Temple and its officers and board will maintain responsibility for all decisions regarding its section of Burial Park for as long as there is an active volunteer available to discharge this function.

Section 2. The Temple will provide the Commission with any bylaws or written procedures attendant to its section of Burial Park, or in the absence of same will agree to draft any and all appropriate documents no later than December 31, 2019. The Temple will also confirm that said bylaws or written procedures have been provided to the management of Burial Park.

Section 3. The Temple will be responsible for informing the Commission of the date on which it requires the Commission to discharge responsibilities as outlined below. Prior to that, the Temple will contact the Commission on a quarterly basis to ensure an awareness that Temple leadership continues to exist.

Section 4. At that time, the president of the Commission (or his/her designee) will be the point of contact for any questions related to Jewish funeral and burial laws, customs, and traditions consistent with the aforementioned Temple bylaws or written procedures, as well as issues related to security.

Section 5. To the extent possible, the Commission agrees to perform an annual site visit to alert Burial Park of any maintenance concerns or other issues pertinent to the Temple’s section.

Section 6. The Commission will assume no financial or legal responsibility for the Temple’s cemetery and is held harmless under this agreement for any advice provided to either Burial Park or Funeral Home.

Section 7. To cover costs that may arise from either the annual site visit and/or the need to repair damage to either gravesites or the cemetery arch, the Temple agrees to create a custodial fund with the Commission out of some of the remaining funds in its general fund, if any, at the time of the Temple's demise. This custodial fund will be restricted to the purposes so noted.

Signatures and date:

Legacy Congregation

Commission on Cemetery Preservation, Jewish Federation

Appendix 7: Sample Cemetery Endowment Agreement with a Stable Synagogue

Memorandum of Understanding

Stable Synagogue

Legacy Synagogue

This Memorandum of Understanding ("this MOU") is between Stable Congregation and Legacy Congregation effective the _____ day of _____, 2016.

Background

- Since the late 1800s, Stable Congregation has owned and maintained a cemetery ("the Cemetery") on Lots 1 & 4, Block 7 in a cemetery located in City, State, and has, over the years since 1974, built up a fund ("the Cemetery Fund") to provide funds, if needed beyond the ongoing operational budget of Legacy Congregation, for the care and maintenance of the Cemetery.
- In addition, Legacy Congregation has, over the years, built up an additional fund ("the Investment Fund") to provide funds, if needed beyond the ongoing operational budget of Legacy Congregation, for other needs that Legacy Congregation may have.
- In addition, Legacy Congregation owns a tract of land ("the Adjacent Parcel") immediately adjacent to the Cemetery on Lots 2 & 3, Block 7.
- On September 28, 2014, the members of Legacy Congregation adopted a Legacy Plan ("the Legacy Plan") which, among other items, set forth a vision and plans for the ultimate disposition of Legacy Congregation's assets and the ongoing maintenance of the Cemetery.
- Pursuant to the Legacy Plan: (i) Legacy Congregation entered in a November 17, 2014, Agency Custodial Agreement with the Jewish Community Foundation ("JCF") whereby Legacy Congregation transferred custody of the Investment Fund to JCF, and (ii) Legacy Congregation entered in a March 26, 2015, Perpetual Care Fund Custodial Agreement with JCF whereby Legacy Congregation transferred custody of the Cemetery Fund to JCF.
- Legacy Congregation anticipates that the operation and existence of its congregational life in City will likely wind down in the coming years and, in anticipation thereof, desires that agreements be reached: (i) for the continuation of the care and maintenance of the Cemetery so as to properly care for and honor the Legacy Congregation members buried there, (ii) for the potential disposition of the Cemetery, the Adjacent Parcel, and other of Legacy Congregation's assets, including its building and personal property, and (iii) for synagogue-related services to be made available to its members.

- Legacy Congregation wishes to endeavor to assist Legacy Congregation in the implementation of its Legacy Plan and to meet the synagogue-related needs of the Legacy Congregation families to the extent reasonably practicable under the terms set forth herein.

Understanding

The designated and duly authorized representatives of Legacy Congregation and Stable Congregation have reached the following understanding, subject to amendment and/or termination until a formal agreement is reached and approved by the respective boards of each:

1. Legacy Congregation intends to combine the Cemetery Fund and the Investment Fund into a single fund ("the Legacy Fund"). The responsibility for the ownership, investment administration, and distribution of the Legacy Fund shall exclusively rest with a Legacy Congregation Legacy Committee ("the Legacy Committee") whose creation shall be authorized by board resolutions passed by the respective boards of Legacy Congregation and Stable Congregation. Immediately upon its creation, the Legacy Committee shall become a committee of Stable Congregation subject to the same governance and controls as any other Stable Congregation committee, and its members shall be appointed by the presidents of Legacy Congregation and Stable Congregation to one-year terms, which, at the discretion of the presidents of Legacy Congregation and Stable Congregation, may be renewed or terminated. All disbursements from the Legacy Fund must be approved by a majority of the Legacy Committee, and the document creating and governing the Legacy Fund shall make clear to the Legacy Committee that: (i) the primary and highest priority objective of the Legacy Fund shall be to ensure that the Legacy Fund shall retain sufficient assets (not to dip below \$200,000 with appropriate adjustments for inflation) to provide for the perpetual care and maintenance of the Cemetery, and (ii) should additional funds be available, they may be disbursed by Legacy Committee consistent with the approved uses set forth in the document creating and governing the Legacy Fund. The Legacy Committee shall be empowered to determine: (i) when and to whom the ownership of the Cemetery shall be transferred, and (ii) whether JCF, the Stable Congregation Endowment Fund, Inc., or some other entity shall have custody and/or ownership of the Legacy Fund.
2. Legacy Congregation shall provide Stable Congregation with whatever copies of documentation Legacy Congregation has concerning the history, title, platting, and operation of the Cemetery and agrees to assist in answering whatever questions Stable Congregation may have about the Cemetery.
3. Legacy Congregation intends to continue to operate the Cemetery using funds from its ongoing operational budget and, if necessary and approved by the Legacy Committee, funds from the Legacy Fund until such time as the Legacy Committee is formally informed in writing that Legacy Congregation desires to transfer exclusive operational control of the Cemetery to Stable Congregation. Thereafter, the president of Stable Congregation shall have exclusive power to renew and/or appoint all members of the Legacy Committee.
4. Legacy Congregation also intends to determine what to do with the building, the Adjacent Parcel, and the other assets which it owns. With regard to the building, it is Legacy Congregation's present intention that, in the event the building is sold, the proceeds from the sale will be deposited into the Legacy Fund. With regard to the Adjacent Parcel, it is Legacy Congregation's present intention to transfer the decision of whether and how to dispose of that property (as well as the authority to act in furtherance thereof) to the Legacy Committee but to ensure that whatever disposition may be made of the land, if any, be conditioned

so as to preserve the dignity and integrity of the Cemetery. In the event the Adjacent Parcel is sold, the proceeds from the sale will be deposited into the Legacy Fund.

5. Upon the execution of an agreement memorializing this MOU, Legacy Congregation and Stable Congregation will execute an agreement whereby each will agree to indemnify the other against any legal claims brought against the Indemnitee for acts and/or omissions committed exclusively by the Indemnitor.

1. Effective immediately, all members in good standing of Legacy Congregation (whose names shall be provided to Stable Congregation by Legacy Congregation) shall be added to the distribution list by which Stable Congregation communicates with its members and shall, at no cost, be provided with all Stable Congregation membership privileges, including issuance of High Holiday tickets upon request. This arrangement shall continue until the conclusion of Stable Congregation's 2017–2018 fiscal year, which ends on June 30, 2018. Thereafter, Legacy Congregation members who wish to join Stable Congregation shall be welcome to do so pursuant to the regular procedures and obligations by which individuals and families formally join Stable Congregation;

2. Upon reasonable notice and request, and where and when feasible, Stable Congregation's clergy shall effort to meet the City-specific needs of Legacy Congregation's members, including conducting services, life-cycle events and/or funerals. Legacy Congregation agrees to reimburse Stable Congregation for any reasonable expenses that Stable Congregation or its clergy may incur in providing such services; and

3. Legacy Congregation shall, in writing to Stable Congregation, designate the name(s) of the individuals authorized and empowered to act on Legacy Congregation's behalf to further the objectives of this MOU, and Stable Congregation shall provide the same on its behalf to Legacy Congregation.

This MOU may be terminated at any time for any reason by either Legacy Congregation or by Stable Congregation by either party providing written notice of termination to the other and, in the event of termination, the only obligations of either party that will survive termination shall be the prompt payment of any outstanding and unpaid financial obligations owed by one party to the other.

This MOU contains the complete understanding to date between Legacy Congregation and Stable Congregation. This MOU may be amended at any time, but only by written amendment or agreement signed by authorized representatives of Legacy Congregation and Stable Congregation.

Legacy Congregation

Stable Congregation

By:
Name:

By:
Name:

Appendix 8: Sample Congregation Survey

As we look to a future of being together in our caring, accepting community, we want you to know that the Temple is your synagogue and we wish to find out how we can better serve you in person and virtually to better meet your needs, you our cherished members and friends.

Please take a few brief moments to complete this short survey, which will ensure that the Temple is listening to your interests. We value your input. You may respond anonymously if you wish.

1*) What do you especially like about the Temple? Please check all that apply and give specific examples.

Cultural programs Examples:

Getting together with fellow congregants Examples:

Jewish holidays

Examples:

Jewish learning

Examples:

Shabbat services

Examples:

Sharing my talents

Examples:

Social justice programs and events

Examples:

Other:

Would you like to comment?

2*) Is there any event or programming that the Temple is not doing that you would like to see offered? Please check all that apply and give specific examples.

Cultural programs

Examples:

Getting together with fellow congregants

Examples:

Jewish holiday programs and Shabbat

Examples:

Jewish learning

Examples:

Sharing my talents

Examples:

Social justice programs and events

Examples:

Other:

Would you like to comment?

3*) Is there any event or programming at the Temple that could be improved? Please check all that apply and give specific examples.

Cultural programs

Examples:

Getting together with fellow congregants

Examples:

Jewish holiday programs and Shabbat

Examples:

Jewish learning

Examples:

Sharing my talents

Examples:

Social justice programs and events

Examples:

Other:

Would you like to comment?

4*) What can we do to make your membership or experience (if you are not a member) more valuable?

Please comment:

5*) How likely are you to recommend the Temple to a friend or colleague?

0	1	2	3	4	5	6	7	8	9	10
----------	----------	----------	----------	----------	----------	----------	----------	----------	----------	-----------

Please circle your appropriate response (0 = would not recommend; 10 = would definitely recommend).

What is the primary reason for your score?

Age

under 30 30 to 50 51 to 70 over 70

Thank you for your response.

Would you be willing to share your email and/or phone number with us?

Name:

Phone:

Email:

If you would like someone to call you or if you would you like to be more involved, please check all that apply and we will follow up with you:

- Volunteer at synagogue functions
- Social or cultural events
- Shabbat services or holidays
- Other (please specify):
- Have someone call me

Appendix 9: Sample Congregation Personal Interview Sheet

INTERVIEWER:

NAME OF RESPONDENT: _____

DATE OF CONTACT:

INTRODUCTION:

My name is _____ and I'm a member of the Legacy Project Committee of the synagogue. I hope you received the president's email outlining what the committee is hoping to accomplish.

(If they say no, you'll have to stop and explain—you can use the wording in the president's email.) You can add personal detail (e.g., you are a newish member of the synagogue) if you wish to.

Is this a convenient time for you to talk? If not, when would be a better time to call back? I'd like to learn more about your experience with the synagogue.

MEMBERSHIP

I. How long have you been a member? ___ years

II. What attracted you to this congregation when you first joined?

III. If a long-time member: Have there been any changes over the course of your membership that made your connection stronger? Weaker?

COMMUNICATION WITH SYNAGOGUE

I. How do you generally communicate with the synagogue about events in your life or things you need, such as changes in circumstances, life events, etc.?

___ Contact the office? By phone? Email? Other?

___ Talk to the rabbi directly?

___ Talk to the president or another officer or board member?

___ Tell a friend who is a member?

II. Do you feel the response you get is welcoming and helpful? Y or N

If not, how could that be improved?

III. Do you feel the synagogue communicates with you frequently enough? Y or N

Too frequently: Y or N

What would work better for you?

Less frequent? More frequent?

Different means: mail email text message phone call

What is your preferred phone number, cell number, or email address?

IV. How do you learn about our services, programs, classes, etc.

- Newsletter
- Website
- Flyers sent via email or mail
- Other (word of mouth, etc.)

V. Would you like the rabbi or the president to contact you? Y or N

If yes, when would be a good time for you?

SYNAGOGUE OFFERINGS

I. Are there any services, programs, discussions, or classes that you attend regularly?

II. Are there things you would attend if offered at a different time? What would that be?

III. Are there any services, programs, or classes that you would like but that haven't been offered?

REACTION TO CHANGES DUE TO PANDEMIC RESTRICTIONS

The pandemic has caused much disruption to our lives and to the way we usually conduct our synagogue life. The most obvious is the move from in-person to virtual activities.

I. Has COVID changed the way you interact with the synagogue? If yes, how?

II. Have you attended any online services or programs? Y or N

If no, is it because you don't have the equipment? Y or N

If you have the equipment, is it because you don't know how to use the program (e.g., Zoom, livestream)? Y or N

Would you like someone to contact you and walk you through the steps for using the program? Y or N

III. Are there things about online services and programs that you like?

IV. What things about online services and programs do you dislike?

V. Once we are able to resume in-person activities, would you like to be able to continue to attend some or all via Zoom? Y or N

If yes, which ones?

VOLUNTEER ACTIVITIES

I. Have you ever served on any synagogue committees? Y or N

If yes, which ones?

Was your experience gratifying? If no, what was unsatisfying?

II. As part of the restructuring effort, we are forming teams of people to work on different aspects of synagogue life. Some of these include budget, investments, legal, ritual, program, social action, publicity, membership, and outreach.

Is there an area you might be interested in working on?

THE FUTURE OF THE CONGREGATION

I. How do you envision the future of the congregation?

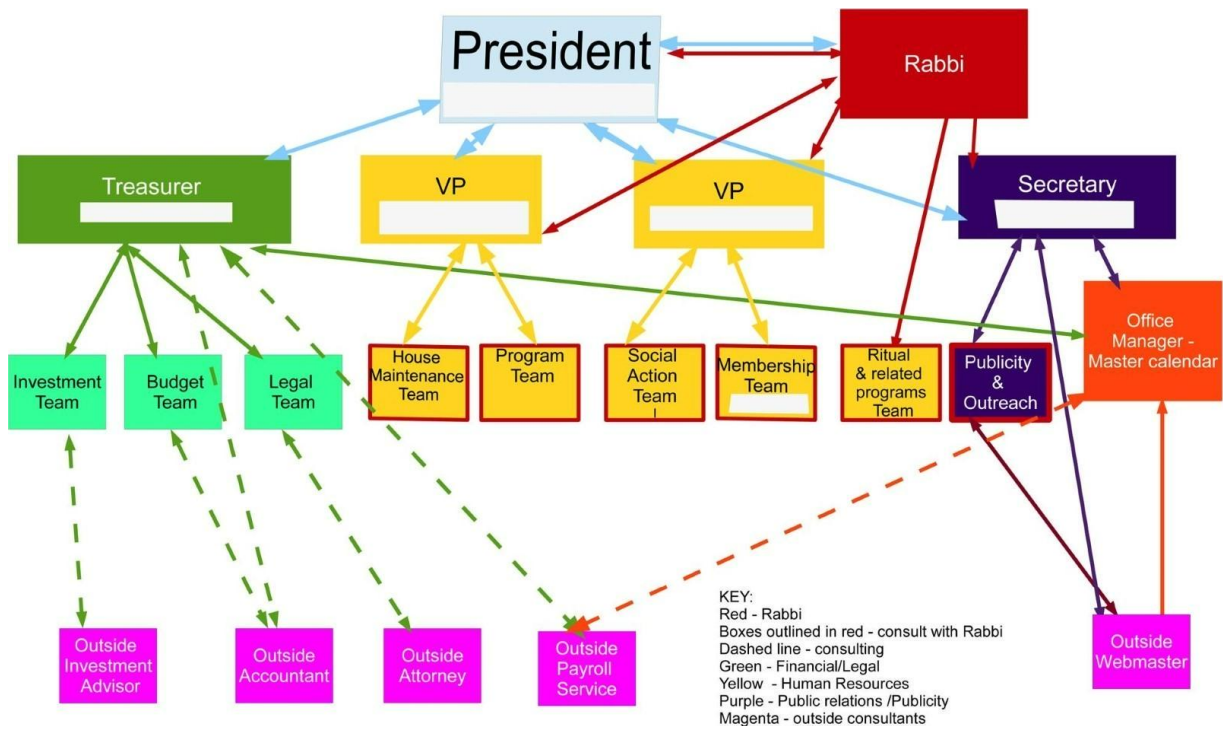
II. How do you think we can move toward that vision?

OTHER

Is there anything else you would like to share about your experience with the synagogue, either positive or negative?

Thank you for taking the time to share with me. If it's okay, I will be in touch with you again in a few weeks. Would you prefer to be contacted by phone or email? In the meantime, if you have any questions, feel free to contact (the interviewer and/or chairperson). We will be compiling everyone's responses and will present the results to the Board of Trustees at either the February or March meeting.

Appendix 10: Sample Congregation Table of Organization



Appendix 11: Trigger Conditions for Closure

Generic

Are the members able to continue to fulfill their connection with the Jewish faith and lifestyle through functions and activities of the congregation?

Are there sufficient members who desire to hold regular religious services?

If there is not sufficient interest in maintaining the congregation for regular services, are there members willing to maintain the building as a house of worship for holidays, visitors, and special events in accordance with the tenets of the Jewish faith? and special events in accordance with the tenets of the Jewish faith?

Are there financial resources of the congregation to maintain the building without deterioration, and for how long? Are there other options available to service the religious needs of Jews in the area should the congregation dissolve? Are there people willing to serve on the Board of Trustees and as officers of the congregation?

Additional

What funding is required for endowing perpetual care of the cemetery, and how may this relate to continued occupancy of the building, and/or other operating expenses, deficit funding, etc.?

Appendix 12: Sample Solicitation Letter to Major Donors for a Cemetery Preservation Campaign

(a revised version can be sent to the rest of the prospects)

LOGO of CEMETERY

Date Name Address

Dear _____,

The Jewish Cemetery in City, State, is a sacred resting place for many of our loved ones. It was established in 1878, by the Jewish community, who have been deeply involved and prominent in this area for many years. Our Jewish tradition teaches that one of our obligations of performing *gemilut chasadim*, acts of loving-kindness, is to honor the memory of prior generations. We do this as our community responsibility by diligently maintaining and improving our cemetery.

As you know, Legacy Congregation has been maintaining and overseeing for over a century the Jewish Cemetery. Because the Jewish population in the region has declined significantly over the past years, members of this congregation have recognized the need to plan for the future so that our cemetery will be cared for and have the funds necessary in the future to continue the excellent maintenance it has received until now. A committee consisting of members from the congregation has been formed to explore options, and a plan of action has been created.

Currently, the assets in the cemetery trust total \$230,000. Our committee has determined that in order to provide for the continued care in perpetuity of the final resting place of our loved ones, the cemetery fund will require the addition of a minimum of \$500,000. These funds will be placed in a designated fund, which has been duly executed as the Jewish Cemetery Preservation Fund, under the umbrella of the Jewish Foundation (which currently manages a total of \$103 million dollars in assets on behalf of individuals as well as charitable organizations, in the form of donor advised funds, supporting organizations, and trusts) and designated solely for the maintenance, repairs, and preservation of the cemetery. Our committee, representing the congregation, in partnership with professional financial advisors, will oversee the investment of the money and its expenditure. The Cemetery Preservation Fund will ensure that the financial resources will be available in perpetuity to continue to provide the highest quality of oversight and maintenance for the cemetery.

Besides the normal maintenance of grass cutting and bush trimming, there are always unexpected issues such as water leaks, dead trees that need to be removed or consequences of other unexpected events. With the establishment of this fund, we can all be assured that the quality of care we want for our cemetery will continue. This cemetery is dear to us all, not only as the resting place for so many of our loved ones, but also as a continued reminder and representation of the rich history of Jewish life in the region.

We invite you to join us in this sacred task. We will reach out to you soon to explore with you the ways you may wish to join us in the preservation of our beloved cemetery.

Your support of the Jewish Cemetery Preservation fund will memorialize and honor the heritage of those generations that preceded us, as well as guarantee dignity for many generations to come.

Most sincerely yours,

Names of the twelve people on the committee

Note: the campaign raised over \$500,000 with the following pledges payable over five years:

\$50,000: 7

\$25,000: 3

\$10,000 to \$24,999: 6

\$5,000: 7

\$1,000 to \$4,999: 17

Under \$1,000: 9

Appendix 13: Legacy Endowment Examples

Cemetery Endowments (to ensure perpetual care of their cemeteries)

Legacy Congregations in Maine, Ohio, Pennsylvania, South Carolina, Texas, Virginia

Legacy Endowments

Legacy Congregation: Arkansas

Camp Jacob: Utica, MS

Legacy Congregation: Illinois

Camp Ben Frankel: Jewish Federation of Southern Illinois

Legacy Congregation, Indiana

Legacy endowment: to be distributed by the Jewish Federation of Greater Indianapolis upon closure of the congregation

Legacy Congregation: Michigan

Yad Ezra—kosher food pantry for the Jewish needy: Detroit, MI

Jewish Senior Life for rent subsidy for elderly indigent residents: Detroit, MI

Taglit-Birthright for need-based scholarships to enable young adults to participate in a Birthright trip: Michigan

Hebrew Union College library: Cincinnati, OH

Legacy Congregation: New York

Legacy endowment: to be distributed by the Foundation for Jewish Philanthropies, Buffalo, NY, upon closure of the congregation

Legacy Congregation: New York

Elderly Services: Syracuse, NY

Legacy Congregation: New York

The Foundation for Jewish Philanthropies: Buffalo, NY

Legacy Congregation: North Carolina

Scholarships for local high school students and Israel scholarships for Jewish NC students; JFNA

Legacy Congregation: Ohio

Temple Beth Israel fund for the Foundation for Jewish Future—Jewish Federation of Greater Pittsburgh

Legacy Congregation: Pennsylvania

Thomas Jefferson High School Scholarship Fund for college scholarships: Clairton, PA

Just Harvest, an advocacy organization to strengthen the anti-poverty safety net and help fight hunger: Pittsburgh, PA

Camp Emma Kaufmann: the Jewish overnight camp in West Virginia serving the Pittsburgh region

Legacy Congregation: Pennsylvania

Greater Latrobe Ministerial Emergency Food Pantry: Latrobe, PA

Congregation Emanu-El Israel: Greensburg, PA

National Catholic Center for Holocaust Education—Seton Hill University: Seton Hill, PA

Latrobe Area Historical Society: Latrobe, PA

Legacy Congregation: Pennsylvania

Legacy endowment: annual distributions to various local charities in the Pittsburgh region and to JCLP

Legacy Congregation: South Carolina

Temple Sinai Jewish History Center

Legacy endowment, including JFNA: to be distributed by the Charleston Jewish Federation upon closure of the congregation (cemetery endowment managed by Temple KK Beth Elohim in Charleston)

Legacy Congregation: Virginia

Legacy endowment: to be distributed by the Richmond Jewish foundation upon closure of the congregation

Legacy Congregation: Virginia

Jewish summer camps

Legacy Congregation: West Virginia

Rabbinic Endowment Fund: Hebrew Union College, Cincinnati, OH; initial deposit with Greensboro Jewish Federation into a Designated Fund

One-Time Donations

Legacy Congregation: Arkansas

Local charities in Arkansas

Legacy Congregation: Massachusetts

Society of Cultural and Historical Preservation; Jewish Heritage Center @ NE Historic Genealogical Society; Jewish Community Legacy Project (JCLP); food pantry; *Jewish Journal*; ZAKA Israel; Emergency Covid Response; Cemetery Association

Endowment: remaining funds held by a foundation and distributed according to their allocation process