

# Questions and Notes about Alternative Dues Policies

## Presidents' Online Gathering – June 23, 2019

### General Questions:

Do other congregations charge for events or community holiday celebrations (Passover seders, Purim parties, Hanukkah parties, lectures, game nights, etc.)?

What other kinds of fundraising besides dues happen during the year, if any? Did changing to a fair share or voluntary structure affect fund raising? Did the congregants "think" they were already contributing their "share" and no longer needed to give in other ways to the congregation?

Are there large congregations that have been successful with the voluntary dues policy as suggested by the Synergy study?

Are there congregations that offer alternate dues policies that own their own buildings?

How do we get more people to annual and very important meetings, and how often do these meetings need to occur? Should we have a meeting once a year reaching out to newer members and try to get older members to be a part of these meetings as mentors and role models?

How many congregations that switched for the voluntary model still keep a separate building fund and torah school tuition?

How can you know whether converting to an alternate dues structure (e.g., based on ability to pay) will result in higher or lower total dues revenue?

In adopting your self-assessment dues model, did you have a "dues backstop" -- a commitments from congregants to "backstop" the major change in dues structure?

What percentage of annual budget is expected from dues?

How much fundraising do you engage in apart from dues? Annual fund?

Has anyone gone to a model that offers free family membership for new members/young families?

- Beth Israel in Media offers ½ price dues to new members
- Evan Pressman, Dorshei Tzedek, Newton, MA: We are looking at a variety of new member incentives. For instance, free member for a year if you were married in our shul

Is your Hebrew school self-sustaining with enrollment fees or is the cost of the school partially underwritten by the congregation?

Did you need to use reserve operating funds to stay afloat and need payroll during those first years of this model to make up those deficit years?

Is there any difficulty collecting dues pledges?

Shawn's answer: "for collecting on pledges we have found invoicing and follow-up during the year is needed for some if they do not pay up from or installment on credit card, checks, etc. – we are almost close to complete pledges– and need some ongoing dialogue."

From Evan Pressman: "in our small shul, Dorshei Tzedek in Newton, we've been near the mark for our financial "obligations" to date - and our FY equals our calendar year."

### Questions for Rabbi Shawn and answers (additional answers in video):

Are congregants asked to re-commit to the covenant principles every year, or is that just once when they join?

Where does the other 40% of your budget come from?

-The other 40% of our income- fundraising, donations and gifts and three rental partners (a school, church and property management group)

Under a new dues model, do you still charge separate fixed amounts for religious school, b'nai mitzvah fees, building/maintenance fund, and/or capital campaign? If so, how have those categories been impacted by the shift in the dues model?

-Within the larger budget that includes building needs. We engage people as prospective or new members as part of Yom Kippur appeal or annual and seasonal meetings– connected to parshiot where this arises in the Torah– offering an adult ed. Jewish course in money and Jewish values (sample lesson and language is in my book Offerings of the Heart, [www.rabbizevit.com](http://www.rabbizevit.com)- forgive the plug).

- Our Hebrew school is also in the budget line.

-230 HH, 50 kids in school, in city not suburb. No backstop except the percentage of dues– also we have moved from major deficits to mostly balanced budget.

- Additional fee per student for school

- Current 5-year sustainability campaign

-We are also ticketless and do not charge for HH, we do ask for Nadir Lev for HH, and provide envelopes for all that nets between \$12,000-\$20,000 year– from both guests as well as some members.

### **Questions for Jonathan (answers in video):**

How were you able to absorb the increase in costs associated with adding a Rabbi, among the 28 families at the time? Did the membership agree to provide a significant increase in pledge/dues/member fees?

How large is the school? \$67K budget is significant...

How much above the \$36 is coming in?

Is the school open to members and non-members?

When you reach to the larger community about your flat dues policy, how do you present it? What kind of conceptual language do you use in marketing materials? i.e. what is the conceptual frame for why it's so low at 36\$? How do you explain such a low dues number?