



Membership Brain Trust

To identify and develop strategic recommendations to bolster Temple Isaiah's membership & mission

<u>NAME</u>	<u>TI AFFILIATION</u>
David Felman	Pre-school
Michael Chasalow	Empty Nest
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Mike Diamond	Board
Melissa Lustgarten	K-12, Board
David Snow	Board
Sheri Vinnecour Reynolds	Membership Dir.
Deb Moses	Exec Dir

Agenda

Presentation's Objectives:

1. Background
2. Current Focus – Membership Dues
3. Upcoming Focus – Retention & Recruitment

Background:

INSIGHT: .
Membership is the largest profit contributor to the bottom line after you factor in business unit expenses (~50%).

REVENUES

	FY 2021 Approved Budget	FY2021 Projected Actuals	FY2122 Draft Budget
Membership Dues Revenue	\$ 1,561,500.00	\$ 1,716,420.53	\$ 1,878,500.00
Preschool Revenue	\$ 2,867,650.00	\$ 3,293,043.12	\$ 4,460,000.00
Annual Giving Revenues	\$ 460,000.00	\$ 980,000.00	\$ 610,000.00
Security Revenues	\$ 225,000.00	\$ 240,000.00	\$ 280,000.00
Religious School Revenue	\$ 548,200.00	\$ 297,448.47	\$ 497,325.00
Camp Revenues	\$ 367,760.00	\$ 606.00	\$ 63,000.00
Facility Rentals/Commissions, Net of Costs	\$ 13,250.00	\$ -	\$ 2,500.00
Other Revenues	\$ 20,500.00	\$ 41,202.00	\$ 31,000.00
TOTAL REVENUES	\$ 6,063,860.00	\$ 6,568,720.12	\$ 7,822,325.00

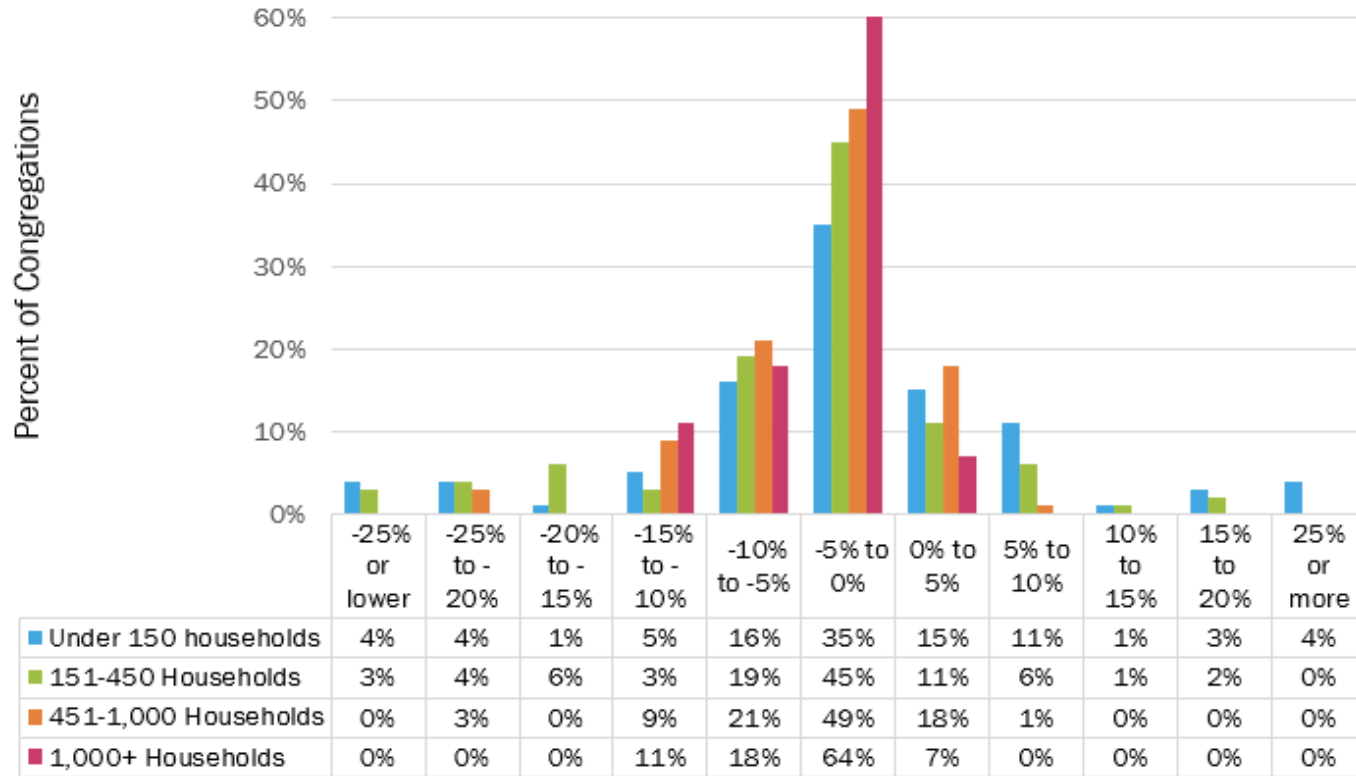
CONTRIBUTIONS

	FY 2021 Approved Budget	FY2021 Projected Actuals	FY2122 Draft Budget
Net Membership Dues Revenue	\$ 1,210,728.94	\$ 1,516,973.07	\$ 1,589,896.04
Net Preschool Revenues	\$ 458,719.80	\$ 1,038,381.29	\$ 1,191,425.68
Net Annual Giving Revenue	\$ 425,891.70	\$ 972,518.00	\$ 599,250.00
Net Security Assessment	\$ 147,450.00	\$ 203,000.00	\$ 198,883.60
Net Religious School Revenues	\$ (279,795.76)	\$ (324,339.69)	\$ (414,315.04)
Net Isaiah Camp Revenues	\$ (8.75)	\$ (77,572.07)	\$ 16,686.25
Facility Rentals/Commissions, Net of Costs	\$ 13,250.00	\$ -	\$ 2,500.00
Other Revenues	\$ 20,500.00	\$ 41,202.00	\$ 31,000.00
TOTAL REVENUES	\$ 1,996,735.93	\$ 3,370,162.59	\$ 3,215,326.54

Background:

INSIGHT: Pandemic = opportunity to experiment & innovate with financial models & funding.

Membership Change by Synagogue Size



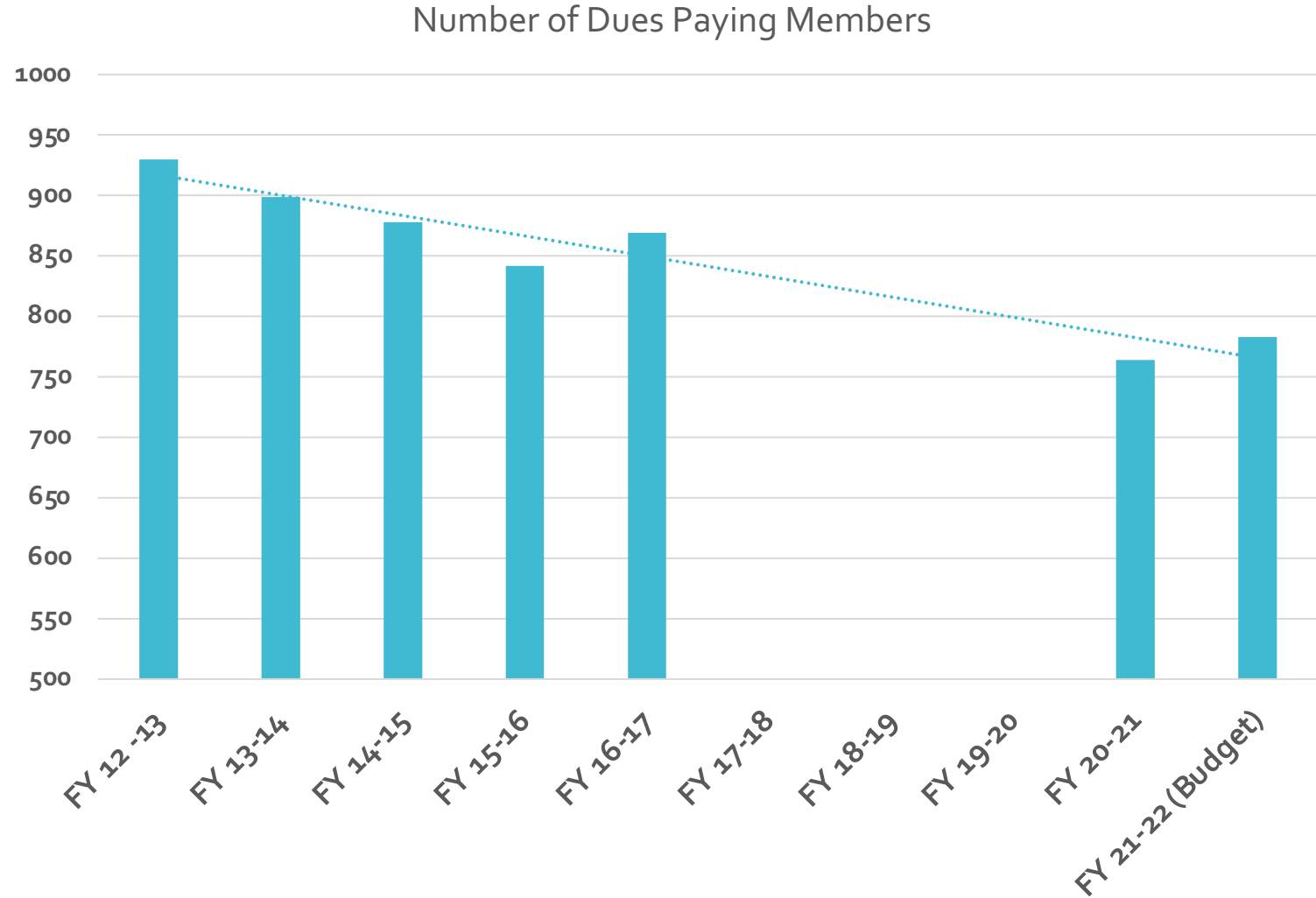
Percent Change in Membership from December 2019 to December 2020
Figure 1

Source: URJ 2020 Pulse Survey

NB: Although the numbers are down, one year is not a trend.

Background:

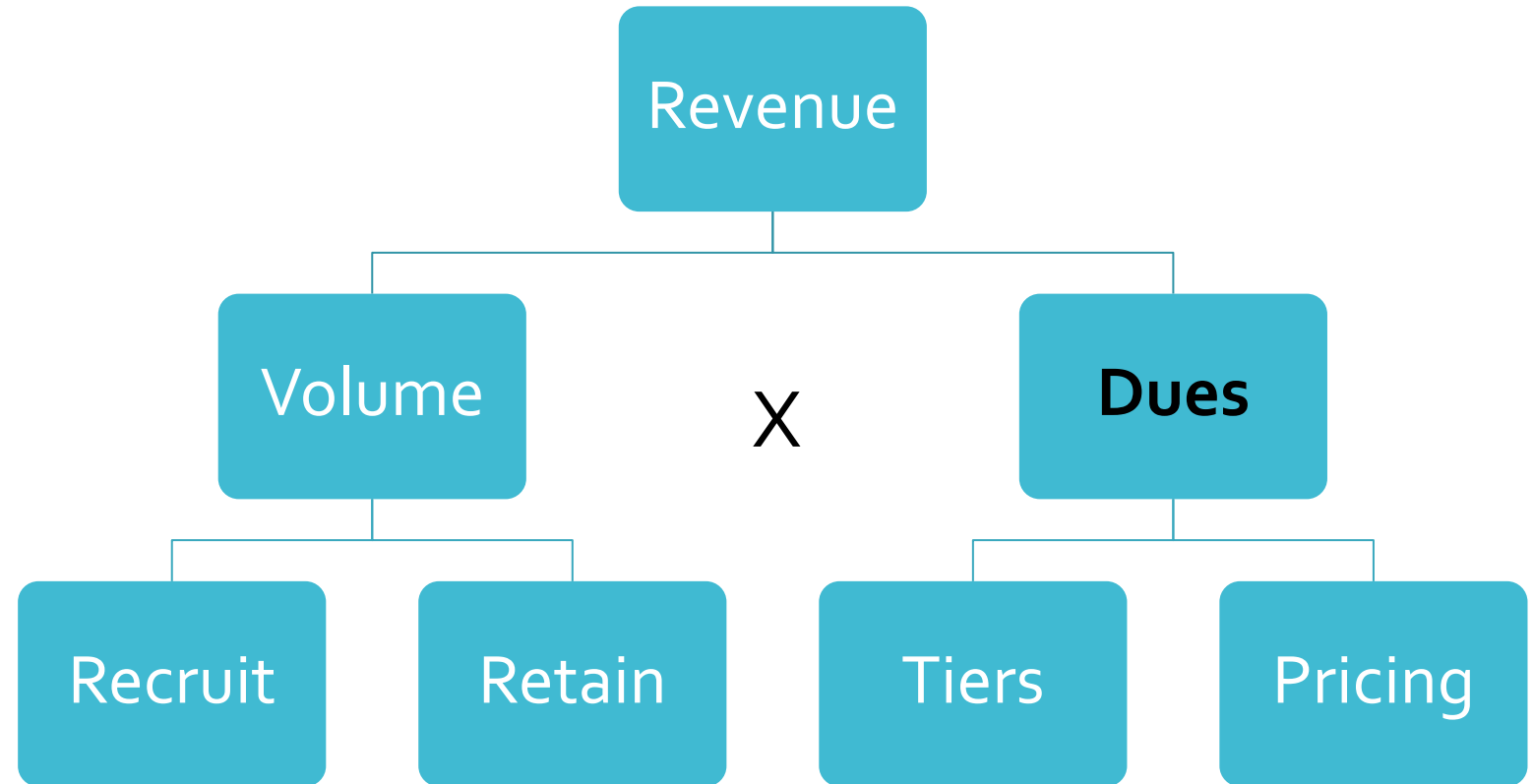
INSIGHT: Membership is declining*.



*BIG FOOTNOTE: But maybe not as dramatically... Membership in past has not been counted in a consistent manner.

Current Focus: Dues

Teasing out tiers will provide future tools to address recruitment & retention.



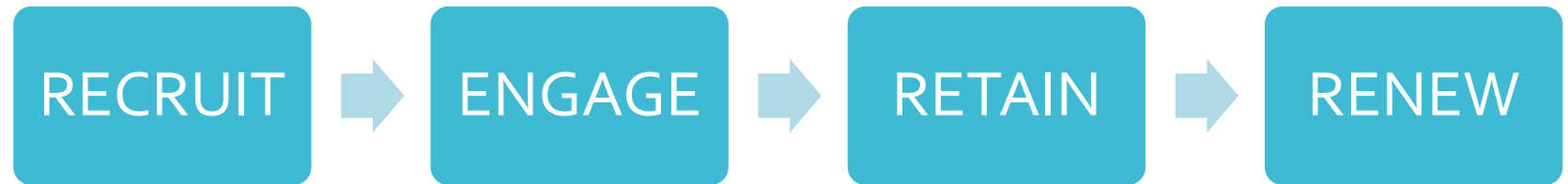
Guiding Principles & Priorities

CREATIVE

ENGAGED

RELATIONSHIPS

CONNECTED



- Word of Mouth
- Pre-school enrollment
- K12 enrollment
- Community social justice work
- **PRICING**

- Rituals
- Small groups
- Clergy including lay leaders in services
- Committee work
- Pre-school
- K12 activities for parents and families
- Lifecycle events

- Adult education (Torah, book clubs)
- Music (Adult & children choir)
- Travel (family trips, camps)
- Volunteerism
- Chai Village
- Groups: (Am Tzedek, Isaiah Women, Family Philanthropy, etc)
- **PRICING**

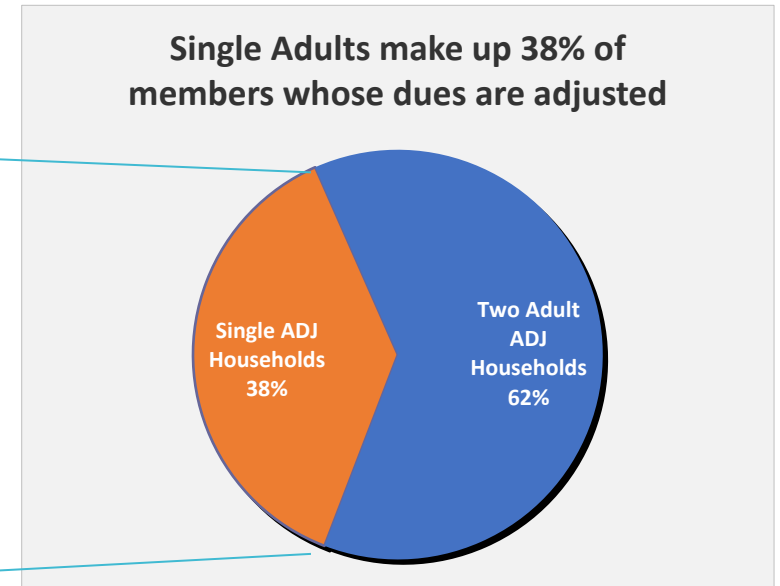
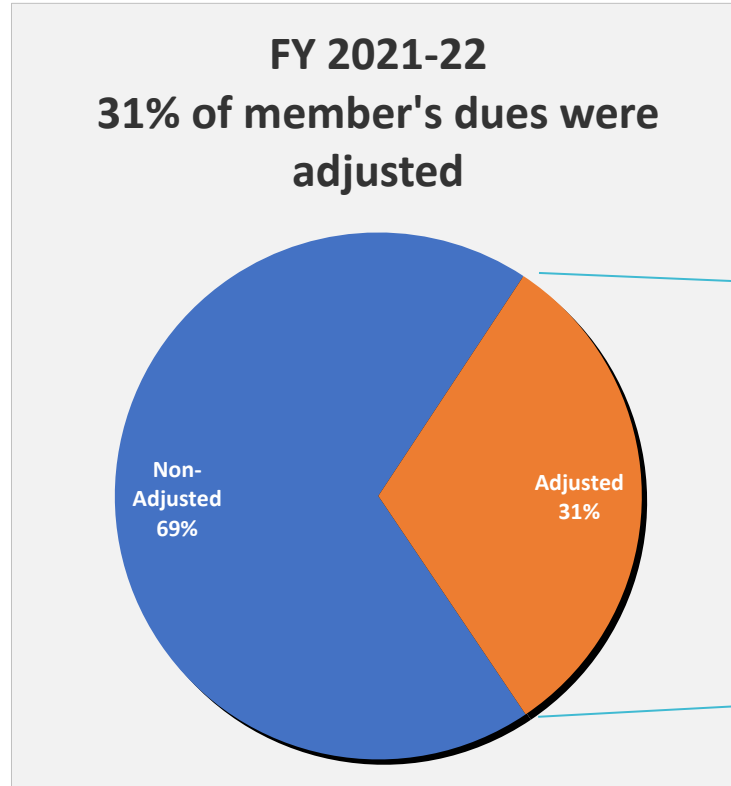
- Membership Director
- Creating processes for resignations, adjustments
- HHD access = renewal tool
- Personal renewal outreach.
- **PRICING**

Current Focus:

Membership Framework

Current Focus: Dues

Insight: Single adult households represent 15% of total community but 38% of total adjustments. AND 80% of single adults have dues adjusted.



Current Focus: Dues

Research & Benchmarking

- Research shows successful, innovative models working at reform temples around country
 - Maintaining / increasing membership revenue
 - Reinforcing 'values & culture'
 - Not cannibalizing general fund raising
- Peer Benchmarks: (Wilshire, Stephen Wise, Temple Israel of Hollywood, Temple Emanuel, IKAR). Also looked at dues at Central Synagogue in NYC & Temple Israel in Westport, CT)
 - TI is only temple with one tier
 - We are priced slightly below peers
 - Many temples have pricing for single vs couples

Current Focus: Dues

What are the problems with our existing dues structure?

Simplify & Clarify

- “One size fits all”... But still overly complex.
- (Re)articulate membership value proposition.

Justifiable

- “Real” numbers tied to budget

Address Adjustments

- Greater transparency & process
- Better forecasting and managing

Sustainability

- Incremental approach provides future pricing tools to support recruitment / retention strategies

Current Focus: Dues Structure

Insight: Lots of potential for improvement in our current dues structure.

Temple Isaiah Membership Agreement 2021-2022

Fees: Please enter the appropriate amounts.

		Amount
Membership dues	\$2,780 per household*	\$
Facilities Improvement Fund	\$485 per year for the first 5 years of membership, then \$295 per year thereafter.	\$
Security	\$485 for 2 adult family or \$385 for a single adult family	\$
ARZA/WUPJ dues (optional)	\$50 per family: Association of Reform Zionists of America & World Union of Progressive Judaism	\$
Administrative fees (if applicable)	If paying by credit card, please add 3% of total charges above. If paying by FACT ACH checking withdrawal, add \$50.	\$
Total amount due for 2021-2022		\$1

Please be aware that your membership dues and some other charges are tax deductible. Please consult your professional tax advisor. Temple Isaiah does not attempt to render tax or legal advice.

*Temple Isaiah is proud that membership in our Temple community is open to all. If you are unable to afford our standard dues and fees, please contact our Director of Membership Engagement, Sheri Vinnecour Reynolds at sheri@templeisaiiah.com for information about financial assistance.

Contact Information:

Name: _____

Email: _____ Phone: _____

Payment Options

For all of our school families, a payment plan is required for those who do not pay in full by July 1, 2021 (or with start of membership, if joining after July 1). Fees can be paid annually, semi-annually, or monthly. If you choose a monthly plan, this option is available via credit card or an automatic ACH check withdrawal by enrolling in a FACT payment plan (go to www.templeisaiiah.com and click the FACT link). Please indicate your payment option preference:

_____ Annually (must be paid by July 1, 2021 or with the start of membership)

_____ Semi-annually (1st payment due by July 1, 2021; 2nd payment due December 31, 2021)

_____ Monthly (by automatic FACT checking withdrawal (\$50 fee) or credit card (3% fee) or credit card)

Please note: There are administrative fees associated with a monthly payment plan and credit card payment.

Credit Card Type: Visa MasterCard American Express

Name on Card: _____ Card #: _____

Security PIN #: _____ Exp. Date: _____

Billing Address (if different from home address):

Signature Date

Thank you for your generous support of our community.

Only 1 level

Four additional "charges"

No opportunity to "opt-up"

No auto-renew

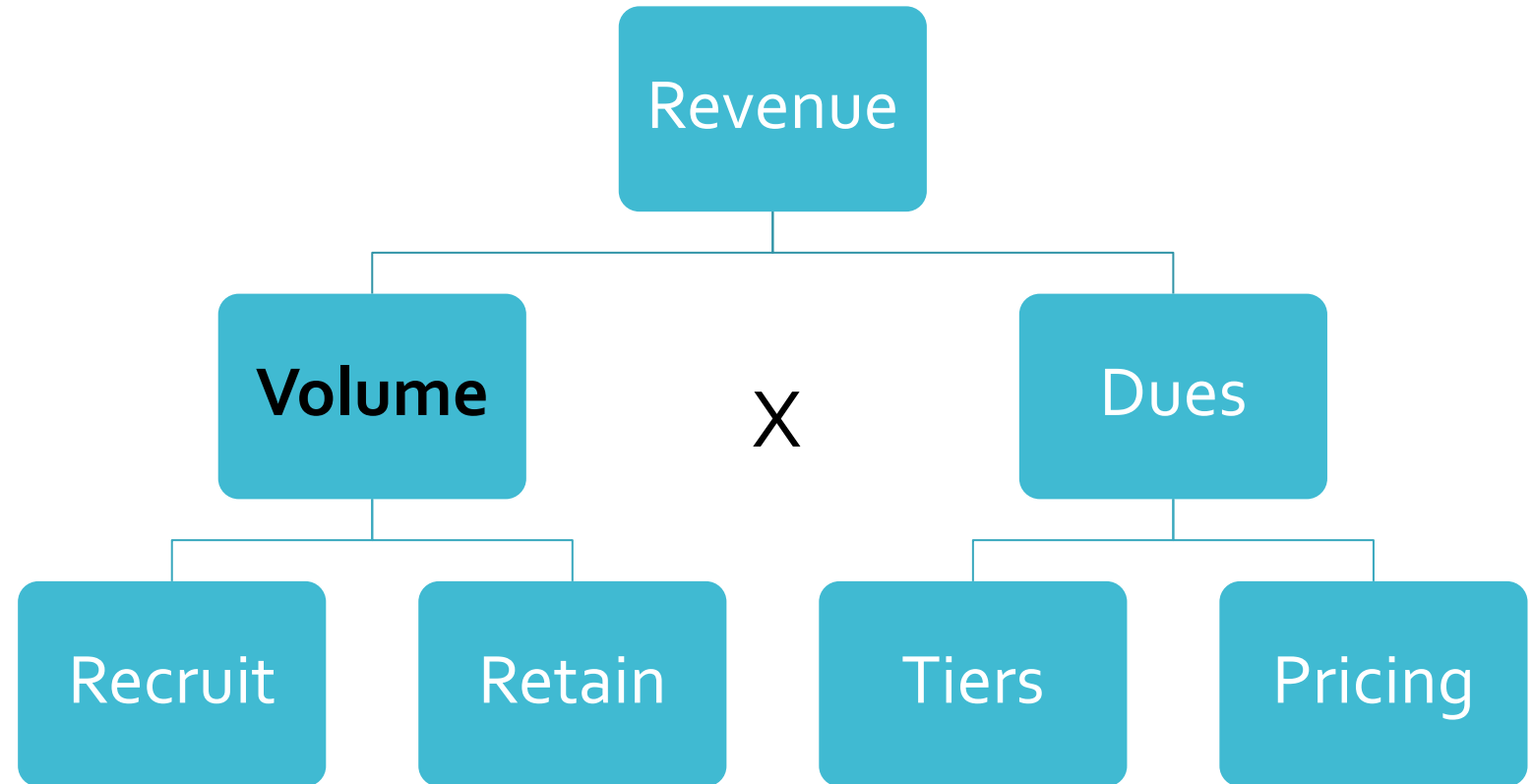
No clear articulation of membership value

Proposed Dues Structure

Checking the boxes

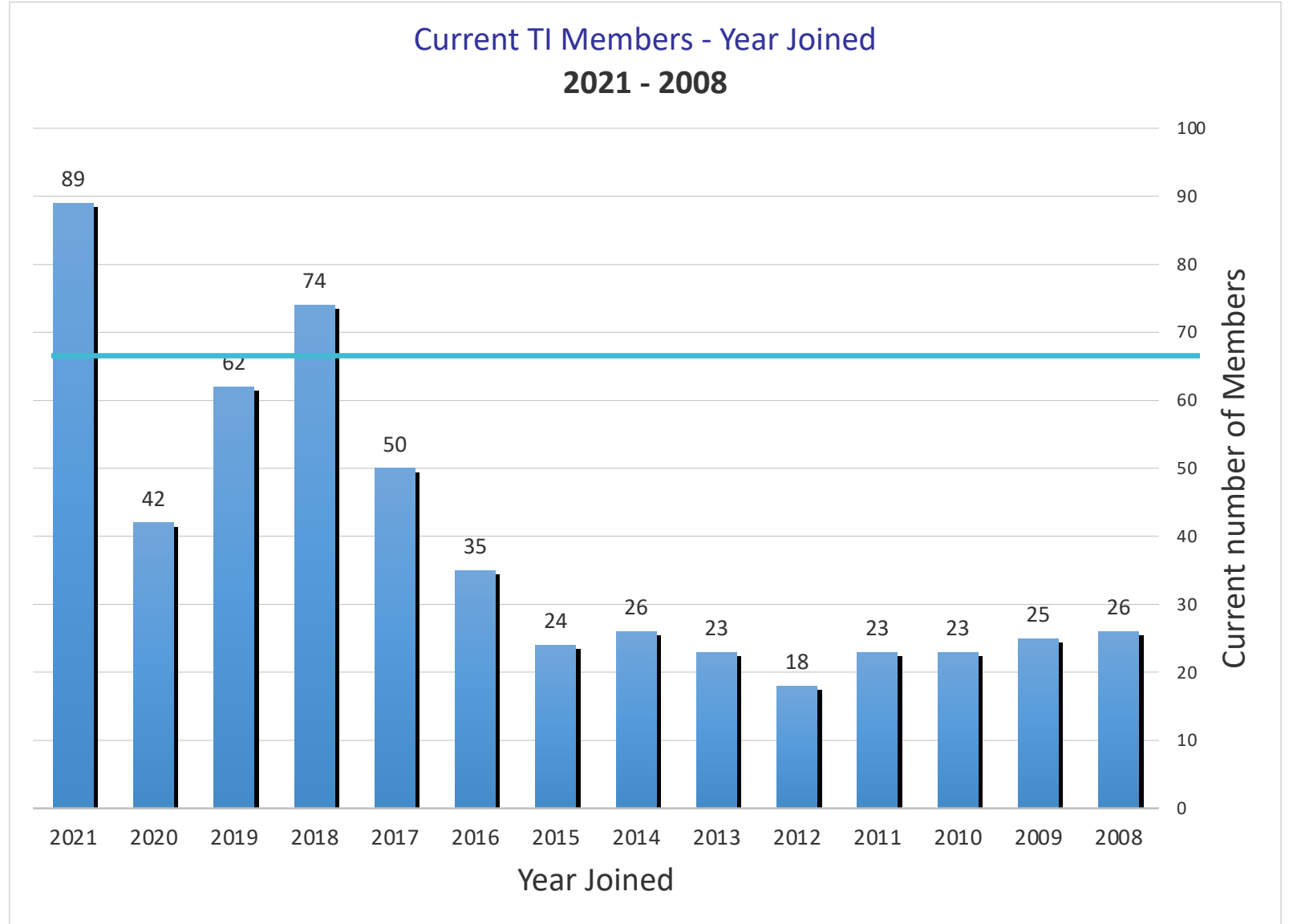
- ✓ Recognizes that one size doesn't fit all.
- ✓ Clear, simple, transparent, justifiable. Dues based on per person.
- ✓ "Recruit, Engage, Retain, Renew" – opportunities to leverage pricing as one tool for increasing membership.
- ✓ Incremental approach – Small first step. Allows for future membership tiers based on objectives and strategy.
- ✓ "Experiment" & "Innovate" – flexible toolbox.
- ✓ "Real" pricing will help reduce adjustments – pricing closer to budget reality should help reduce adjustment.
- ✓ MAINTAINS total membership dues for most
- ✓ MAINTAINS overall Membership Revenue

Future Focus: Retention & Recruitment



Future Focus: Retention

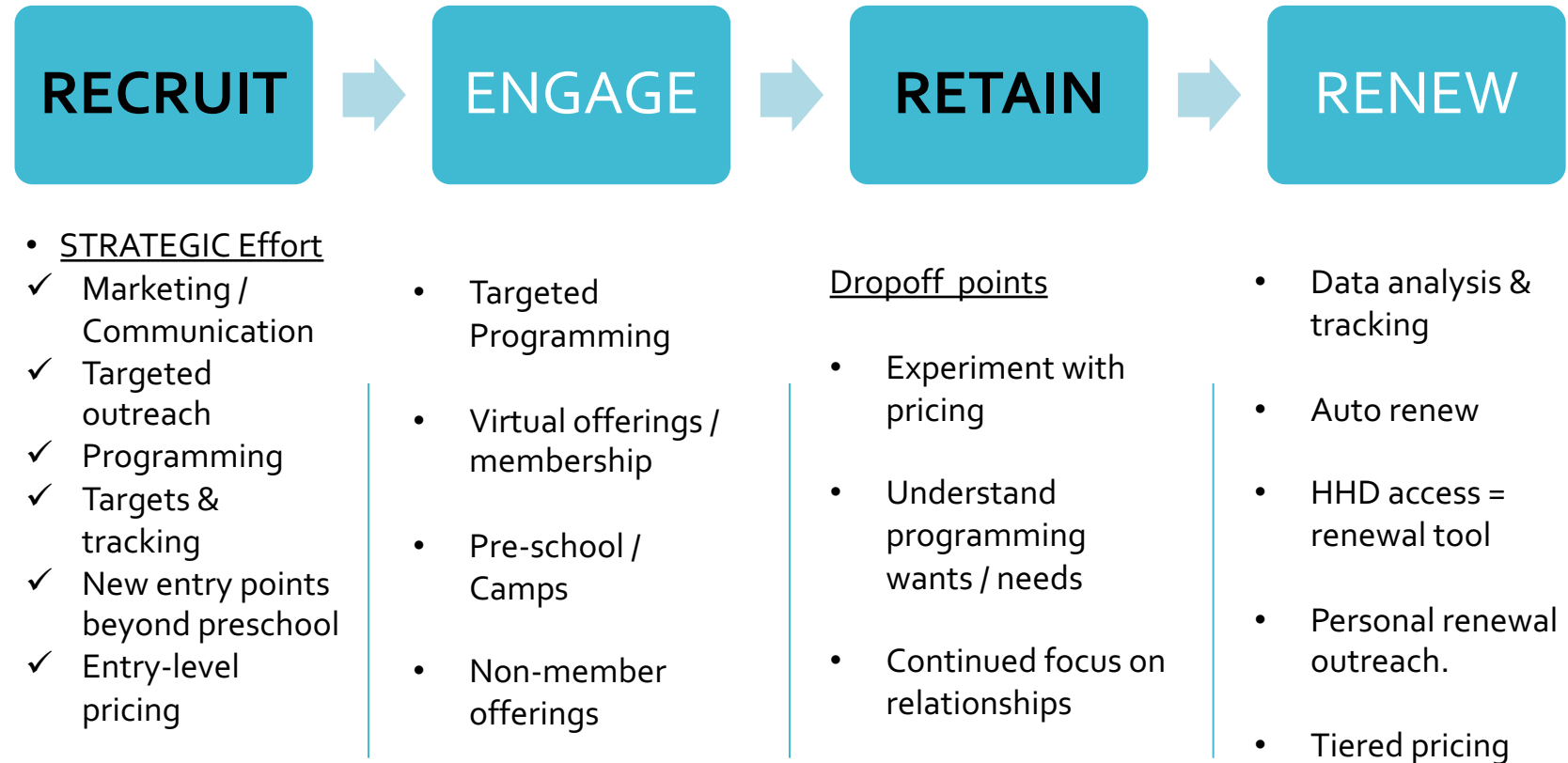
INSIGHT: ~60 new members per year → by year 7 of membership, decreases to 24 members. (~60% attrition).



Retention & Recruitment

Future Focus:

Develop strategic initiatives to tactically address drop off points and attract new members.



Brain Trust

*To identify and develop
strategic
recommendations
to bolster Temple
Isaiah's membership &
mission*

Questions