

President's Report, Mark Levine, September 26, 2021

My term as Temple President is over. I survived-phew! I tip my hat to presidents who have gone before me.

We live in very uncertain times, on reflection, the most unsettled in recent memory. The existential threat of climate change is real. In recent months Canada has faced devastating fires, draught and hurricanes. The pandemic is pernicious as we are now into its fourth wave. The rise in antisemitism and islamophobia is scary. Populism in politics has altered what is acceptable. Those who stormed Capitol Hill are charged with misdemeanors if anything. Those who oppose vaccination swear at our politicians, throw dirt at the Prime Minister, and picket our healthcare institutions. These are just a few issues of our times. The recent High Holy Day services provided me the opportunity for reflection on some of these issues. I realized that for me, Temple Anshe Sholom (TAS) is a constant, a rock of stability in these times. It acts as a buttress against external forces and is a beacon of light.

General Comments

Since the last AGM in August 2020, the pandemic continues, and we currently find ourselves in the fourth wave. The Temple is very slowly opening up. In the past year religious and educational activities were conducted by ZOOM and have continued. The regular Shabbat services were well attended. In September 2020, Rabbi Cohen and Cantor Baruch organized virtual High Holy Day services which were excellent and well-received.

This past summer (2021), the Federation held Camp Kadimah at the Temple. It was wonderful to hear the laughter and voices of children. This laughter reminded me of what the future holds after the pandemic is over.

The High Holy Day period which we have just celebrated was the second one where services were conducted virtually for the most part. I recognize that there are some congregants who were disappointed because the services were not held in person. We had to plan the type of services that were to be held several months before-hand. At the time there were already signals that the fourth wave of COVID-19 would be a problem. Your Board chose a cautious approach prioritizing the safety of our congregation. Hopefully, this will be the last High Holy Days celebrated virtually.

What has been accomplished?

The major task of the current board was to “right the ship”. I believe that this has been accomplished. Over the past two years, processes have been put in place to capture accurate information that is key to running our Temple operations, e.g. data on finances, membership and the cemetery. We now have strong staff in the Temple Office. This unit is key to the successful operation of the Temple. There are several key issues that have been tackled. These are discussed below.

1. Membership:

Having reliable accurate information is key to the successful operation of any enterprise, be it a business, hospital, or synagogue. In 2019, when our Board commenced its work, we lacked accurate information on the number of Temple members (family units).

Planning was based on membership numbers from a decade earlier. The Temple Office was using several different lists of members which led to inconsistencies and inaccuracies.

The Membership Working Group, under the leadership of Marla Frank Davis, accomplished several tasks:

- They established an accurate, up-to-date list of members in good standing.
- They followed-up on congregants with dues outstanding;
- A new transparent grid for membership dues was established. It is based on the concept of commitment to a sustaining membership level (\$ 3,000). The sustaining member level is based on generating sufficient revenue to support Temple programming. If it is not possible for a member to pay the sustaining membership level, then a range of dues based on life status are described in a transparent dues grid. The new grid was rolled out in the past year for new members. There will be wider implementation to the congregation this fall.

Currently, there are 251 member units in the Temple. In the past year (2020-21) there have been 20 new member units. Of our congregants, 19 have passed away.

2. ShulCloud:

To address the issue of having reliable accurate information, the Board made a policy that there would be only one data management system used for Temple operations, including membership. That system is ShulCloud. It is used by over 1,300 synagogues in North America, Europe and Australia. It is functional, versatile and comprehensive. The Temple acquired ShulCloud several years ago, but it was not used to its full potential. A task force led by Board member Bill Shugar took on the responsibility of implementing ShulCloud. Bill, the clergy, and office staff participated in ShulCloud educational and training sessions. A plan for its roll-out was created. This has included reaching out to congregants helping to register them into the program. ShulCloud has many functions which enable us to organize properly and efficiently. However, the database is only as good as the information that is entered. Please cooperate and register. If you need help, please reach out to the Temple Office. ShulCloud should also help improve the efficiency of Temple business, e.g. regular invoicing for membership, dues reminders and updating credit card information.

3. Temple Cemetery:

Temple Anshe Sholom is the oldest Reform Congregation in Canada and was incorporated in 1853. Our cemetery on Limeridge Road is even older. It was established approximately five years before. There had been a plan to sever a strip of land from the western side of the cemetery and sell it for much needed revenue. When the consultants who were working on this project applied to the provincial government through the Bereavement Authority of Ontario (BAO) for permission to conduct an archeological survey of the cemetery land to be sold, they were informed that the BAO had no record of the TAS cemetery. All cemeteries in Ontario are licensed by the province and are required to comply with Ontario's Funeral, Burial and Cremation Services Act, 2002. We were informed that TAS did not have a license. This came as a shock to Carl and David Loewith, the co-chairs of the Cemetery Working Group and myself. It was a serious

situation which could not be ignored and had to be rectified. An application was completed and submitted to the BAO to obtain a license. Our Temple cemetery bylaws were not in compliance with the legislation, and they had to be revised with the help of the Loewiths and the Cemetery Committee. The contract which we were using to purchase a plot was also not in compliance with the legislation and had to be rewritten. The revised bylaws and contract were reviewed by the BAO. It required several iterations before they were approved by the BAO. A very important goal of the legislation is to ensure that the consumer is protected. When a plot is purchased, 40% of the purchase price goes to the Care & Maintenance Fund for the future upkeep of the cemetery and these funds must be held in trust. Although the Temple's Care & Maintenance Fund had been segregated over the years into a separate bank account from operations expenses, it was not a trust. We had to establish a legal trust for the Care & Maintenance Fund as specified and approved by the BAO. Finally, in June the license was received. This journey took nine months. It is not over; we must submit annual financial statements to the BAO and comply with the legislation. In conclusion, I am happy to say that we are now in compliance with the Laws of Ontario. I charge all of you to be responsible for ensuring that we remain in compliance.

4. Temple Financial Situation:

Our Temple Treasurer, Liora Malka, has prepared a separate report. Hence, I will be brief and highlight a few points. When our Board's term began in 2019, the projected deficit for the Temple for 2019-20 was \$220,000 and the debt was about \$350,000. It was planned that the budget shortfall would be covered by a gala. A 40% drop in membership over the last decade and aging congregation had contributed to the reduction in revenue. The key to managing our financial situation is to have accurate information and a proper financial reporting system. Liora Malka worked doggedly at this task to implement an accurate, robust and efficient system. Managing our finances over the last 18 months has been complicated by the pandemic. At the end of the 2021 fiscal year, the deficit has been reduced to \$73,000. We kept a close eye on the Temple's line of credit and it did not increase. We did not have to tap into the endowment fund.

Although the in-person gala was cancelled due to COVID-19, the Gala Organizing Committee, under the leadership of Marla Frank Davis, nimbly pivoted and planned a virtual event. It was a smashing success. The net revenue from the event was approximately \$130,000. During the past two years, there have been special gifts that I am very appreciative of: Rabbi Baskin donated \$50,000 in September 2020 and \$25,000 in September 2021. Emmy Singer donated \$50,000 in July 2021.

Although we have managed to make it through the last two years, looking forward I am fearful about the financial sustainability of our Temple. If the current annual revenue and expense rates continue, the debt could increase to over \$1.5 million within five years. There are two initiatives to deal with this challenge.

The plans to sever a strip of land from the west side of the cemetery are moving forward. It was held up by the lack of a cemetery license. Once we obtained the license from the BAO, the process gained traction. I would like to thank David Horwood at

Effort Trust for his work and support in this project. The process to obtain the necessary approvals from City Hall has started. I am cautiously optimistic that the sale will occur within the next 12-18 months. The sale of the cemetery land will bring in substantial revenue and will give us some breathing room. All it does is move the deficit spending down the road. The second initiative to deal with the financial challenge relates to establishing a strategic relationship (to be defined) with Beth Jacob (see below).

5. Beth Jacob:

The concept of Temple Anshe Sholom (TAS) and the Beth Jacob (BJ) coming together and operating separately under one roof had been raised periodically over the years, but there had been no serious discussion of the concept (except amalgamating the schools). Declining membership and poor financial health of the two congregations stimulated a need for serious discussion about the two entities “coming together” in some manner.

In March 2020, Lorne Richter from the BJ Board and I met to determine whether there was interest in collaborating in some fashion. Informal talks took place over the next several months. Initially, they involved Lorne Richter and Ted Lax from the BJ, and myself. The group participating in the discussions was expanded to include the BJ Board Executive, the TAS Board and the rabbis. A literature search was done to learn about other Conservative and Reform congregations where partnering or merger had occurred. ZOOM calls were held with representatives of three different institutions which had come together in some fashion (Congregation Beth Israel Judea, San Francisco; Emanuel Synagogue, Sydney, Australia; and Temple Adath Yeshurun/ Temple Concord, Syracuse, NY). The model used for each of the three institutions was different.

Gradually, a vision emerged of two congregations sharing one building. It is called a “cohabitation model” where the two congregations are in one building, and they share some of the common operating and program costs. The sharing of expenses such as utilities, cleaning, security and building maintenance are integral to the model. Merging schools is also a consideration. In June 2020, the boards of both institutions approved proceeding with detailed discussions about the cohabitation model.

Progress on the cohabitation discussions between BJ and TAS slowed down because of the pandemic and other priorities. Temple Board member, Josh Rauchwerger, and BJ Board member, Jamie Richter, continued discussing the co-habitation model based on the agreement that has occurred in Syracuse between the two temples. Jamie was invited to attend the May 20, 2021 TAS Board meeting to discuss his views on the co-habitation model and answer questions. A motion was made that the TAS Board accept the following as a Mission Statement to support the discussions on the co-habitation of TAS and BJ: *“TAS and BJ would like to share a building for our mutual benefit, both financial and for a coming together of the Jewish community. This would uphold the three functions of the Jewish community: Beit Knesset, Beit Midrash, and Beit Tefilah. These three aspects of Judaism cross denominational lines.”* The Board approved the resolution.

Recently, the talks have gained traction. There are three negotiators from each institution who will meet to work out the details of the model. The TAS negotiators are Josh Rauchwerger, Mitchel Levine and Joshua Kaufman. An experienced facilitator, Linda Kislowicz, well known to the Hamilton Jewish Community, has been engaged to aid the discussion process. She has met with each of the negotiators and talks have begun in earnest recently. The timeframe is aggressive; 45 days to complete the plan. The intention is to communicate progress to both congregations. Both congregations will need to approve the final plan.

Conclusion

It is now 18 months since the pandemic began. The Temple is very slowly opening (or we hope to), but the fourth COVID-19 wave is upon us. Despite all the hardships that the Temple and community have experienced during COVID-19, we have survived and have “stayed afloat”. TAS is resilient. I celebrate this! Kol hakavod!

I would like to acknowledge the Board for their support and hard work. This Board was the first one established based on the recommendations of the Task Force on Governance and new Temple By-laws (2019). Our Board was small, but each board member cared about TAS and tackled Temple business with passion. Thank you (Yves Apel, Marla Frank Davis, Liora Malka, Gillian Burman, Ginny Levine, Bill Shugar, Josh Rauchwerger, Josh Kaufman, and Haim Goldstein). Board members worked collectively, but also individual board members took on leadership roles in specific areas; Marla – Membership and Gala; Liora – Finance; Gillian – Board Secretary and opening up; Ginny – Human Resources; Bill – ShulCloud; and Josh R- Beth Jacob.

The new organizational structure based on the recommendations of the Task Force of Governance is in place. I appreciate the hard work of the members of the Working Groups and Task Forces. Special thanks to Kevin Samson who was always available to deal with issues related to our building, and to Carl and David Loewith who efficiently and professionally ensure that the Temple’s cemetery meets the congregation’s needs.

I also appreciate the work of Rabbi Cohen, Cantor Baruch and Dora Ann Elison. Thank you to Joe Paseo, Shelby Frank Davis (Office Administrator) and Terry Nyp (Temple Bookkeeper).

I must admit that there were times of feelings of despair when I contemplated the Temple’s future and whether it will be here in five years’ time. With the plan to sell the cemetery land and the plan for co-habitation with Beth Jacob, I have hope for the future.