

## **FAQ (Frequently asked questions)**

For ease of reading, the combined congregation will be referred to as ‘congregation NEW.’

The Joint Executive Committee (JEC) is a combination of the elected officers of Temple Emanu-El and Congregation Or Chadash and some invited guests. These guests were invited for their expertise in subject matters associated with the congregations or the process of combining two entities and forming one entity.

### **Why do Congregation Or Chadash and Temple Emanu-El want to combine?**

Both congregations’ boards and clergy feel that the combination will strengthen the Jewish community of Southern Arizona. Also, for the future of each congregation, we are stronger together financially, demographically, spiritually, and programmatically.

### **Where will we site congregation NEW?**

Both congregations voted in February, 2020 to ratify the Memorandum of Understanding (MOU); and the MOU said that congregation NEW will be headquartered at the Country Club property. There are a number of reasons for this, including: worship space (sanctuary and chapel) is big enough to house congregation NEW, the religious school will have enough space to meet, the brick construction is of interest given contemporary security concerns, and facilities for the Strauss Early Childhood Education Center (ECE) are located there.

### **What will happen to the Alvernon property?**

Congregation NEW – which will be comprised of the former Congregation Or Chadash & Temple Emanu-El – will decide how to utilize resources, including real property, in the best interests of NEW. There are no plans to sell the Alvernon property at this time.

### **Who will be the Rabbi?**

Per the MOU, all clergy will be part of congregation NEW (Rabbi Louchheim, Rabbi Saulson, Cantor Cohen, and Cantorial Soloist Hochberg) at its inception.

### **Will there be a Senior Rabbi?**

The current plan is for Rabbis Louchheim and Saulson to operate as a team (equals.) This is referred to as a partnership model and was suggested by Rabbi Louchheim.

### **What is the status of Rabbi Saulson?**

Rabbi Saulson is an interim Rabbi; and he has a one-year contract that started July, 2020. Given the status of the formation of congregation NEW, the Central Conference of American Rabbis may approve a one-year extension if the Transitional Board of Trustees (TBoT) elects to offer Rabbi Saulson an extension. This would allow time for NEW to conduct a search for a new rabbi, with the search commencing in the fall of 2021.

### **When will we hire a second, settled Rabbi (not interim)?**

This is a question for the Transitional Board of Trustees (TBoT) of congregation NEW. This will be one of its first conversations.

### **Who decided that forming a new congregation is better than merging?**

There are two ways to legally combine congregations: 1) merger, with one of the original organizations becoming the “surviving entity” and absorbing the other, and 2) forming a new organization, transferring assets from the original organizations to the new. The JEC recommended the second option, and the boards of both congregations approved forming “NEW” rather than a merger. With the NEW entity option, we emphasize equal partnership of each contributing congregation. We will all be founding members of a new congregation. And we expect to build on the traditions and legacies of each synagogue, not to lose our history.

### **What are the next steps to decide if congregation NEW will be formed?**

The Joint Executive Committee (JEC) is preparing a Plan of Consolidation. This plan is designed to enable each member unit of Temple Emanu-El and Congregation Or Chadash to cast an informed vote on the creation of the new entity.

**A yes vote** will authorize the creation of the new entity, according to the Plan of Consolidation. The Joint Executive Committee will then direct the attorneys to file Articles of Incorporation and any other required legal documentation.

**A no vote** will result in each congregation remaining independent. The religious school will remain as a joint entity.

### **What is the date of the vote?**

The current plan is to distribute the Plan of Consolidation when it is ready, in December 2020 or January 2021, and to conclude the vote in January 2021. A multi-week timeframe for voting is required due to existing bylaws. There is no firm date yet, as much work still needs to be done prior to initiating the vote.

### **What will my dues be?**

What you pay now is what you will pay during the transition. There are no current plans to change the dues structure. Any changes to dues amounts will be decided by the TBoT. The TBoT will discuss and set dues rate for congregation NEW effective July 1, 2021.

### **What will the office staffing look like?**

The JEC and each congregation’s board are working on a staffing plan. The process to fill available positions will start after the vote on the Plan of Consolidation, if the result is Yes. There will be administrative and clergy assistants, facilities management staff, and financial management. The current staff at Or Chadash and Temple Emanu-El will be given the first opportunity to apply for available positions.

### **What is the status of the religious school?**

The religious schools of both congregations combined in July 2020; and Rina Liebeskind is the director. It is operating and meeting online. When it is appropriate to meet in person, the school will meet at the Country Club location.

### **Why do we have an Early Childhood Education Center?**

The Strauss Early Childhood Education center (ECE) provides an excellent early childhood education to the children of the Tucson Jewish community and the larger Tucson community. In addition, the ECE has provided a positive revenue source for Temple Emanu-El, which is expected to continue in the future for congregation NEW. The enrollment at ECE did decline during the original COVID-19 shutdown. The ECE re-opened after a short time period and began to provide emergency care (care for children of essential personnel). The ECE has a waiting list for students; and we anticipate that enrollment will increase rapidly once the community begins to experience work and activities more like pre-COVID-19 conditions.

Questions have been raised if we could move the ECE to the Alvernon campus. Without any consideration of whether the ECE would fit at the Alvernon campus, the ECE gets a large number of families based on its proximity to the University of Arizona and downtown Tucson. Also, the Jewish Community Center (JCC) is right next door to the Alvernon campus; and we would be in direct competition. These factors indicate that the ECE would not be as successful as it is on Country Club if it were moved to the Alvernon campus.

### **What are the financial impacts of combining?**

Based on an extensive evaluation of both congregations' finances, the joint financial task force determined that, if we combine, the benefits will be positive. This evaluation was done prior to COVID-19. With continued evaluation, the finance team suggested that there will still be a positive financial outcome, and that the benefits continue to outweigh any downside. As with all synagogues, congregation NEW will rely on the financial participation of its members, as it did in pre-COVID conditions.

### **If the vote outcome is to form a new congregation, then what will happen next?**

The attorneys will file Articles of Incorporation with the state to form a new legal entity. The attorneys have advised that Temple Emanu-El and Congregation Or Chadash remain legal entities and not dissolve for a time period after the creation of congregation NEW.

The Plan of Consolidation includes new, proposed bylaws. The new bylaws, to be provided with Plan of Consolidation (PoC), will go into effect at the time of creation of the new entity. They include creation of a Transitional Board of Trustees (TBoT) to operate from the start of the new entity until a new Board of Trustees (BoT) is elected and begins its term.

The TBoT will be active after the vote is completed until the new BoT is installed in July 2021. All current officers and directors of the boards of both congregations have been invited to serve on the TBoT. The new BoT will be elected at the congregational meeting for NEW in May-June 2021.

The TBoT will continue to integrate the two congregations into one. The process to fill positions will start; and work processes will be consolidated.

Due to COVID-19 constraints, we anticipate that services will continue online until we meet criteria for in-person meetings per our joint Reopening Planning task force.

**How will congregation NEW conduct services?**

The joint Ritual Task Force and clergy will plan services. The schedule for this was greatly affected by COVID-19. Rosh Hashanah and Yom Kippur services were successfully combined for a single set of virtual services this year. The regular Friday and Saturday services have been combined, whereby the clergy host a service in one congregation's style for Friday and one for Saturday, in an alternating fashion.

**Will congregation NEW address inclusiveness and welcoming of interfaith families?**

It is our intention that congregation NEW will be inclusive and welcoming to people of all backgrounds. Our interfaith families are an important source of experience, voice, and perspective in fostering this aspect of our sacred community.

**How will a name for congregation NEW be chosen?**

As congregation NEW is a new entity, neither current name (Congregation Or Chadash, Temple Emanu-El) is being actively considered. The lay leadership and clergy recognize the love that each congregation's name invokes and how important it is to our sense of identity. The new entity needs a new name to emphasize equal partnership. The new name will be chosen after reviewing the results of a congregational survey. The name survey was initiated before the vote on formation of a new entity, as the new name will be entered in the Plan of Consolidation and the Articles of Incorporation. We expect to include a tagline with the new name, along the lines of "honoring and building on the traditions of Temple Emanu-El and Congregation Or Chadash." This will be used in communications about congregation NEW.

**What is the expected size of congregation NEW?**

Currently, both Or Chadash (OC) and Temple Emanu-El (TE) have approximately 350-360 member units. Combined, that is roughly 700 member units. The JEC was advised that data from other merging congregations show an expected 10% loss in membership initially; but that percentage is often regained in the following years.

**What is our timeline?**

Approximately 2 years ago, discussions started between OC and TE with individuals and board members. Both boards decided to start "dating" to see if a union could be formed. Ambassadors from both congregations met and discussed the possibilities. We formed task forces to consider various aspects of a "merger"— including finance, governance, and worship. Presentations were made to each congregation during the fall of 2019, indicating that there were many advantages and no insurmountable barriers to combining our congregations. Both congregations approved a Memorandum of Understanding on February 9, 2020, directing their

Boards to proceed toward combining our congregations, with the understanding that there would be a second vote prior to the legal process for merging (or consolidating). The task forces presented their findings to the boards and congregations at town halls in November 2020. A final vote to combine is tentatively scheduled for December 2020 or January 2021. If the vote confirms the formation of congregation NEW, operations will be integrated. We anticipate that, later in 2021, we will have one set of systems in place for the operation of congregation NEW. At the recommendation of Legal Counsel and both Boards, OC and TE will remain legal entities, solely for the purpose of protecting the names and administrative purposes. Sometime in the future, OC and TE will be legally dissolved. In summary, this is an approximately 3-year process.

**The facilities task force is recommending upgrades to the Country Club buildings. What are they and how much will they cost?**

The task force has presented a number of potential upgrades to the Country Club facility. No upgrades have been approved by current Boards of Directors. And, the intention is that TBoT and BoT will consider the financial status of NEW before paying for projects from operating funds or approving loans for the proposed upgrades. There is no plan at this time to finance the upgrades by selling the Alvernon property. The recommendations from the Joint Facilities task force include roof rebuild, fire alarm system upgrade to current standards, repaving of the south parking lot, improvements to the east doors, and sanctuary improvements like lowering the bimah and changing flooring and painting. This is not a complete list – see the presentation for details. (It is posted on the websites.) Costs are unknown at this point because projects have not been decided and bids have not been received.

**How will the suggested upgrades be financed?**

There is a projected operating savings with the formation of congregation NEW. Estimates have varied prior to and after COVID-19, as economic conditions fluctuate. A recent projection from the joint financial task force is a net surplus of approximately \$70,000 in the first year of operation. No projections have been formalized by the task force beyond the first year.

Note: it is possible that the funds for improvements may come in the form of a construction loan. We would need to include the cost of loan servicing in NEW's budget over multiple years. Currently, there is no plan to tack on a building renewal fee or to increase dues to cover this cost.

**Are there plans to upgrade or enlarge the bathrooms at the Country Club building?**

The ECE and Religious school bathrooms are being evaluated. There is a location in the religious school wing that has been designated for redesign to add more bathrooms without excessive work or costs.

The bathroom facilities in the main area of the building cannot be enlarged as they share a wall with the kitchen. A 'family' bathroom area to the south of the sanctuary exists and will be evaluated to see if additional restroom space can be created there.

**Will the kitchen be remodeled?**

Improvements to the kitchen are on the suggested list of projects for the Country Club location. The estimated cost, depending of the extent of the improvements, has been suggested to be \$40 –150K. When these improvements would be made has not been decided.

**When the south parking lot is refinished, can there be shade?**

The solar array in the north parking lot of the Country Club facility provides shade there. Adding panels in the south parking lot would not be cost effective at this time.

Trees have been suggested; however, this would limit parking and activities that can take place in the parking lot, like the Purim Carnival.

**Did either congregation ask for and receive PPP funds?**

Both TE and OC applied for and received PPP loans and used the money according to PPP guidelines. We anticipate that repayment will not be required for much or all of the amount. Rules for loan forgiveness include multiple factors, however; and the results of analysis are pending.

**Is the reserve fund at TE really just PPP money?**

No, the PPP money was received and spent according to PPP guidelines. TE’s reserve fund balance is the result of savings and expense reduction.