

*2020 Annual Meeting  
September 13, 2020*

# Har Shalom Report to Annual Meeting

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# Agenda

Introductory Prayer by Rabbi Laurie Franklin

David Cox President report

- Mission, Vision, goals
- COVID-19 Response

Rabbi Laurie Report

Paul Rosen, Treasurer report

- Reviewing past fiscal year
- Current financial condition
- 2020 – 2021 Budget

Nominating Committee Report, Holly Kingsford

Community vote for slate of board nominees

New Board will meet to review job descriptions

*Proposed*  
**Vision, Mission**

**VISION**

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We envision a cohesive, holy community united by Jewish values and traditions, a "makom", a sacred space, to create meaningful Jewish life for current and future generations.

**MISSION**

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We will create opportunities to engage in spiritual exploration and worship, Jewish learning and culture, and the pursuit of justice.

# A Message for the Annual Meeting from Rabbi Laurie Franklin

## Finding and Building Connection in a Time of Pandemic

As we approach the New Year, I see hopeful happenings: new friendships developing and older ones deepening, despite the zoom platform, and sometimes, because of it! Har Shalom is developing new ways of reaching out, teaching and learning, and practicing ritual. All of us are rediscovering what is most important to us as we adjust to restrictions of pandemic social life. In some ways, the pandemic has jump-started our High Holiday practice of introspection by forcing us to pare down our daily lives to the things we value most. As Jews, we are once again engaging in the act of re-inventing ourselves—as we have done throughout millennia—to survive and thrive.

One remarkable happening for Har Shalom: Most years, our supporters are slow to renew their annual financial commitments to Har Shalom. This year, at least half or more renewed early! It is a sign that we share the feeling that it is important, and even critical in this moment of economic contraction and physical distancing, to sustain our small Jewish community. That's a BIG deal. It encourages me that we share the desire that our small congregation lives and grows. Supporting Har Shalom fulfills a promise for our future, for our congregation's beautiful children. It fulfills a promise to each other that we will establish meaningful Jewish life and identity in our Montana town. It fulfills our promise to humankind to share our valuable heritage. It fulfills our promise to the world and to the Divine that Jewish identity is not merely history or nostalgia but is a dynamic, spirited response to life.

What do you hope to feel, think, and accomplish in the year to come? How might our Har Shalom community support it? Let's talk soon. Let's work together to fulfill our dreams. Let's build holy community.

# Holy Community in a Time of Coronavirus

**Report to the Congregation, Annual Membership Meeting  
September 13, 2020**

As we are entering our seventh month of the Covid-19 crisis, to say that the past year has been challenging seems an absurd understatement; we haven't been able to use the synagogue since March. It is not a question of "if" but "when" we can resume our former in-person activities, but the "when" is as yet not predictable.

That said, Har Shalom has continued to function as a virtual congregation thanks to Rabbi Laurie Franklin and your Board of Directors.

Last year, the Board and Rabbi participated in a couple of workshops to review Har Shalom's mission and operations. As a result, we revised our Mission statement:

**"We will create opportunities to engage in spiritual exploration and worship, Jewish learning and culture, and the pursuit of justice."**

This embodies that we commit ourselves – all of us – to create and sustain a holy community here in Missoula that promotes the spiritual growth and well-being of our Jewish community.

Thanks to Rabbi Laurie, we have continued to offer worship services, pastoral counseling, Torah study and Beit Midrash online; she has also added a Wednesday "Lunch with the Rabbi" program available via Zoom.

**- Continued**

We're so gratified that many members – as well as two or three foundations -- in the past year have stepped up to assure adequate financing of our operations:

- We paid off the principle of our second mortgage over the last year, resulting in the elimination an \$8k annual debt payment
- Due to extra contributions, including a \$10k foundation grant, we raised nearly \$12,000 for necessary building security upgrades
- The membership elected Rabbi Laurie Franklin to be our permanent, part-time rabbi for the first time in our congregation's history
- We began to put together our vision for a Jewish Learning Project

And yet, along with these accomplishments, we still have challenges: our aging building will need additional renovation this coming year, including repointing and repainting the exterior cinderblock walls, as well as resurfacing the parking lot. We still need to finish structural repairs of the garage so that we can rent it out.

And, of course, we all look forward to the day when we can gather again in the synagogue, with the crisis behind us and renewing our hopes for the future.

## Highlights from Fiscal Year 2019 to 2020, from the Treasurer's perspective.

**In the Spring we paid off 2nd mortgage loan.** This is a huge accomplishment as the balance was approx \$100,000.00 just 3 years ago.

Before we go celebrating our abundant riches, please bear in mind that we were able to pay it off, in part, due to several very large contributions: we cannot necessarily count on these benefactors now that the 2nd Mortgage is paid off.

Also bear in mind that we still have the first mortgage. That payment has been essentially covered by rental income from our tenant. However, there has been a change in ownership of the Montessori school. The new proprietors of the Montessori school are new at this, just starting out, and dealing with fallout from Covid-19.

Because we deemed it important to keep a tenant in place, we agreed to a reduction in our rental income of approx 10 thousand dollars annually, based on their reduced class sizes.

Also, we did take on a PPP loan (Payroll Protection Plan) because at the beginning of the pandemic we had no idea how it would affect our contributions. this loan is underwritten by the Small Business Administration, and will most likely be forgiven entirely.

Our deadline for filing taxes is November 15th, and I have been in contact with the bookkeeper and the CPA on this topic, we should file in plenty of time.

Our President David Cox has been working on next year's budget: We may have a budget to formally approve at a Board meeting in the near future.

I have completed 3 years of service as treasurer, and I hope to hand the job off after one more year. (Training will be provided).

# Har Shalom Board Strategic Goals for 2020-2021

## **Goal 1:**

Financial stability for the near-term through positive cash flow, matching grants and networking in order to achieve a cash reserve by the end of the fiscal year.

## **Goal 2:**

Increase net membership by at least five family units in 12-18 months by energizing the Membership committee and through collaboration with the rabbi.

## **Goal 3:**

Expand our educational, cultural and social justice programming during this fiscal year resulting in greater membership/volunteer engagement (measured in volunteer hours).



**Nominating Committee Members:**

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Bert Chessin

David Jolles

Holly Kingsford

Crystal Koosman

Barb Gross

**We are proud to nominate the 2020 – 2021 Board of Directors**

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President: David Cox

Vice-President: David Jolles

Secretary: Sherry Kolenda

Treasurer: Paul Rosen

Immediate Past President: Holly Kingsford (*Ruach Chair*)

Member at Large: Bert Chessin (*Membership Chair*)

Member at Large: Crystal Koosman