

Unification? What is this vote about?

For some time, Temple Sinai and Congregation Rodef Shalom have been discussing potential merger. In 2023, the Boards of Temple Sinai and Rodef Shalom charged a Steering Committee with exploring the possibility of unification. Since then, the Steering Committee has led this investigation with significant input from our clergy, our executive director, and our congregants, including more than 150 volunteer members of various Category Groups exploring various aspects of a potential unification.

Based on the recommendation of the Steering Committee, both Boards have approved the Steering Committee's recommendation that our congregations vote to move forward with unification and the Boards have both adopted a *brit* (a covenantal commitment) which sets forth the terms under which unification could occur. A congregational vote is scheduled for **June 8, 2025 at noon**, for the Members to determine whether the Congregation will move forward with unification.

Why Unify?

There are two answers: one inspirational and one practical.

The **inspirational** "why" is that we can build and achieve more together. Temple Sinai and Rodef Shalom have similar values and complementary strengths. Together, with combined resources and combined energy, we have an exciting opportunity to build on our strengths to create a vibrant home for congregants and for Reform Judaism, ready to include the Jewish community of today and tomorrow, for us and our children. By combining, we have the opportunity to create new ideas, new gatherings, and new programs to invent the future of Reform Judaism in Pittsburgh.

The **practical and critically important** answer is financially driven. Temple Sinai's budget is supported by three "buckets:" member pledges, philanthropy, and the draw from our endowment of approximately \$5M. As reported during our last several annual meetings, despite having reduced expenses as much as possible, the congregation has been running deficits each year. For the coming year, the board approved a budget with a deficit of \$130,000.00 – after a significant endowment draw of about 5.5%. Without significantly more revenue, our congregation cannot continue as we know it. While some congregants have increased their pledges and philanthropy in response to these messages over the last few years - and their generosity is so appreciated - we have not seen the growth in funding from our members that is necessary to sustain the congregation long term. Based on our operating budget for the last 3-5 years, without unification, we will need a fundamental change to our operations, either through extreme cost reductions or imposing minimum pledge requirements or an assessment for all congregants. Any of these options would considerably impact the "feel" of the Temple Sinai we know and love.

Voting Mechanics

Pursuant to the Nonprofit Corporation Law of Pennsylvania and the Bylaws of Temple Sinai Pittsburgh Pennsylvania:

- Each household in good standing may have up to two adult members of that household vote at the Special Meeting.
- Each voting member may vote, yes, no, or abstain, as it relates to the resolution below.

- The Special Meeting will be at 12:00 pm on **June 8, 2025** Voting will be allowed either in person, via Zoom or phone dial in to Zoom, only. Voting will remain open, in person and via Zoom, through 7:00 pm to ensure that everyone who wishes to do so has the opportunity to vote. We expect the presentation and discussion to last from approximately 12:00 – 1:30.
- The vote will pass by simple majority.
- This is a vote to pursue unification, **not** a final vote to unify. A final vote will take place after several months of due diligence and further development of a precise plan of merger.

Proposed Resolution (Subject to Modification):

WHEREAS, the officers and steering committee of Temple Sinai Pittsburgh Pennsylvania (“Temple Sinai”) have spent more than eighteen months exploring a potential unification of Temple Sinai and Rodef Shalom Congregation (“Rodef Shalom”), to the benefit of each and to the future of Reform Judaism in Pittsburgh; and

WHEREAS, the unification (merger) of Temple Sinai with another congregation must ultimately be approved by the Board of Trustees and Members in good standing of Temple Sinai as set forth in the Bylaws of Temple Sinai; and

WHEREAS, at a meeting of the Board of Directors of Temple Sinai, the Board voted to recommend to the members of Temple Sinai that they approve the pursuit of unification between Temple Sinai and Rodef Shalom, pursuant to a Brit or Term Sheet adopted by the boards of the respective congregations.

NOW THEREFORE BE IT RESOLVED, that the Members recommend that Temple Sinai take the necessary steps to continue the process of unification with Rodef Shalom, under the terms and process described in the Brit, as recommended by the Board; and

RESOLVED FURTHER, that the proper officers of Temple Sinai are authorized and directed on behalf of Temple Sinai, to pursue a plan of unification under the terms and process as described in the Term Sheet and to negotiate and deliver all documents necessary to achieve the proposed unification.

Key Terms of the Expected Unification

- Following a positive vote, the congregations will enter a transition period to move towards merging as a singled unified congregation. During the transition period the congregants of each of Temple Sinai and Rodef Shalom will collaborate on programs and do things together.
- Following unification, the clergy for the New Congregation will be Senior Rabbi Daniel Fellman, Cantor David Reinwald, and an associate or assistant rabbi who will be hired jointly.
- The executive director of the New Congregation will be Drew Barkley, who will oversee the staff of the New Congregation and oversee both staffs during the Transition Period.
- Following unification, the “New Congregation” will have a new name, determined by the members of both congregations.
- The New Congregation expects to unify at the location at Fifth and Morewood, currently the home of Rodef Shalom Congregation.

- The New Congregation will operate with a financial model that includes a pledge-based system, the continuation and development of a capital fund, and a security fund for New Congregation's physical location at Fifth and Morewood, that requires no more than a 5% draw from the combined endowment to have a balanced budget.
- During the transition period, the congregations will be assisted by consultant Plan A Advisors, who will assist with programmatic development for the New Congregation.
- The transition period will be the period where the congregations determine the legal, financial and programmatic details of the New Congregation, and during which the existing congregations will seek approval for the unification from the Courts and Attorney General as required by law.
- During the transition period, the process will be directed by an eight member lay Management Committee with equal representation from each congregation.

Additional information about the exploratory work done by the Steering Committee and Board can be found throughout the website 412unity.org.