

TO: Shir Tikvah Board

FROM: Facilities Assessment Group

- Amy Funk, board member
- Kay Harris, board member
- Judy Hollander, former President
- Eli Kramer, board member
- Greg Leder, congregant
- Bruce Manning, Chair, President Elect

DATE: August 30, 2017 (with typographical corrections September 12, 2017)

This is the final report of the *ad hoc* Facilities Assessment Group. The F.A.G. was created in November 2016 by the Executive Committee. This is its first and final report.

Charge/Task

The Shir Tikvah Executive Committee asked the Facilities Assessment Group to:

- A) Update our understanding of our current, near-term, and long-term facility needs;
- B) Assess the strengths, opportunities and weaknesses associated with our current facility;
- C) Recommend a sober/grounded and limited set of options we could pursue to get our facility needs met; and,
- D) Outline a process to engage the congregation in understanding our needs, likely pathways, and time, money and other resources needed.

When the committee started its work, Rabbi Latz put together the following framework for this task:

As a spiritual community, we ask ourselves: What are the facilities we need to do our work in the world? In the time of Moshe and the Exodus, the Israelites needed the Ohel Moed, the Tent of Meeting. It was portable, so the former slaves could carry it through the desert. In the time of Solomon, we built a great Temple (twice!), to offer sacrifices to God. In Diaspora, we create synagogues big and small, as gathering places, houses of worship and study. In the 20th century following the Shoah, Jews moved en masse to the suburbs and created large, beautiful

synagogue buildings to affirm both for themselves in the shadowy trauma of the Holocaust—and to the non-Jewish world—that we were here, we are rooted in this community, and that we are a stable and enduring part of the American story. When Shir Tikvah was established in 1988, it was important to the founders to find a building in which our congregation could thrive. We moved into our current facilities in 1994. This facility was built in the 1940s for 200 adult members of First Unitarian church. At the time, Shir Tikvah had approximately 200 households. Today, at the close of 2016, Shir Tikvah has just a few short of 500 households and our cozy building—while certainly home—is increasingly a barrier for us to worship, study, gather, and do our justice work in the world. Today, nearing the end of the second decade of the 21st century, we are asking a different set of questions about our facilities, our resources, and our place in the community. What are the facilities we need to do our work in the world?

The committee also framed the core question as follows: “What are the ways in which our building is enabling our mission and the ways which in our building is frustrating our mission?”

This memo sets forward the results of our work over the past nine months. While it reaches some conclusions, it also sets the table for much work to be done. Assessing our facilities has been one of the three main areas of focus for the board in the last year or so.

Process

We tackled our work by first checking in with our own sense of the successes and shortcomings of our space. We then determined to proceed in two ways. First, we would interview key stakeholders: the people who use the building most often and in different ways. Second, we would do some preliminary research, looking at other available information that might relate to our space.

Interviews

Committee members interviewed the following people: Crystal Cochran (Judy), Barry Epstein (Amy), John Humleker (Kay), Wendy Goldberg (Bruce), Sarah Lahyani (Bruce), Rabbi Latz (Bruce), Rabbi Rappaport (Judy), David Raskas (Kay), and Forrest Yesnes (Amy).

Other research – membership and occupancy trends

Eli, using historical data and trends, made some rough membership and school enrollment projections. These rough projections are shown below.

	FY17	FY18	FY19	FY20	FY21
Low Growth Scenario (+10 households per year)					
Membership	490	500	510	520	530
High Holiday Attendance	613	625	638	650	663
Sunday School Enrollment	196	200	204	208	212
Other Days/Year Building is Max Capacity	5	5	5	5	5

Medium Growth Scenario (+20 households per year)					
Membership	490	510	530	550	570
High Holiday Attendance	613	638	663	688	713
Sunday School Enrollment	196	204	212	220	228
Other Days/Year Building is Max Capacity	5	5	5	6	6

High Growth Scenario (+30 households per year)					
Membership	490	520	550	580	610
High Holiday Attendance	613	650	688	725	763
Sunday School Enrollment	196	208	220	232	244
Other Days/Year Building is Max Capacity	5	5	6	6	6

For each of the above scenarios, it is worth noting that at the very least most every Sunday morning the building is at maximum capacity; all of the rooms are being used and there is a warm but chaotic crowd straining the boundaries of what is usually the oneg area. And the number of full simchas, where families are unable to find space to dine, for example, is likely higher than five or six a year.¹

As of the time of this writing (which is just 8 months later than the projections Eli made), we are already in the higher growth projection for membership, with just about 520 members. Whether that higher growth rate continues is, of course, unknown. But we ended FY 17 with well over the 490 families we had thought likely in December 2016. Eli estimated, based on historical data, that the number of kids in Sunday school would be 40% of the number of family units. Sunday school enrollment, however, has stayed mostly flat in the last few years. To get a better handle on this would require more demographic knowledge than we currently have. Growth in Sunday school enrollment,

¹ This paragraph is an addition to the version presented to the Board, based on feedback from the Board at the September 7, 2017 meeting.

however, will likely stretch our current classroom space, including rented space, as Sunday school time is a very high-use time in the building. As discussed below, we also do not have any available space to run concurrent programming on Sunday mornings.

It is worth noting that High Holidays are already close to or at capacity at First Unitarian Universalist/the old Adath.

Other research – historical information

We reviewed earlier evaluations and building-related plans from previous boards and work done by staff. What all of these made clear is that accessibility has long been an issue for the congregation. There is still now, as there was then, a sense that there's some potential allergen issues in the building. The current challenges we discuss here were also mostly anticipated – earlier leaders foresaw that if the congregation continued to be successful, it would strain the building. This also guided some earlier planning efforts from the congregation and the board, like paying off the building so we would have some increased flexibility moving forward.

Other research – shared space arrangements

We made two casual visits to First U and met with their current president and with a professional leader. There is additional information about First U later in this memo.

We also did some research on the ways in which religious congregations share space. The upshot of this research is that there are lots of different arrangements. Avodat Shalom and a Korean church in River Edge, NJ and Shir Shalom and St. Bede's Episcopal in Mar Vista, CA, for example, have a landlord/tenant relationship. There is a co-ownership model (a synagogue and a Unitarian church in Cincinnati, for example). Some organizations have a shared campus but separate entity model (like the Tri-Faith Initiative in Omaha: Temple Israel, Episcopal Diocese of Nebraska, and a mosque). Other organizations have a single governing body, like Genesis Church and Temple Beth Emeth in Ann Arbor.

Other entities in some kind of shared space arrangement have highlighted some of the more complicated issues to be addressed: religious symbols (crosses), religious practices (kashrut, or at least, pork), economic arrangements, scheduling/calendars, policy harmony around issues like political engagement and building management, expenses for maintenance and repairs, and rentals.

The upshot is that any shared space arrangement will raise a whole host of issues but we aren't without models to consider.

Other research – remodeling/investing

No one on the committee is an architect or builder. We know enough now to know that if we want to look at expanding and reconfiguring our present space (and we do suggest that we do that), we will need to retain professional help. We know that professional help can guide us to understand the full range of what our needs might lead us to as we consider working within the boundaries of our Minnehaha property. The committee does have a lead on a person who could do an initial consultation and we think that there may be other names that might emerge from professionals in the congregation that could be of help (but we would not recommend retaining a congregant). The take-away from this work was that remodeling this space could mean a very large range of things and that we can't understand the parameters of the possibility here without professional help. The initial consultation with an architect or similar professional would likely be at no cost.

What we have learned

Common themes emerged in our interviews and from our research. The nature of common themes is that not everyone shared everything, and some things had minority views as well. Still, there was a strong sense that the following observations are widely (but not universally) shared.

There are some ways in which our facilities work for us, according to those we talked with and from our own observations:

- For all of us on the committee and for all we interviewed (and we are certain for most in the congregation) the building holds many memories of simchas and quiet moments, of celebrations and sorrows, of joy and community.
- The sanctuary with its low bimah (or no bimah some days), the Shir Tikvah shuffle, the absence of quiet corners, the crowd, enables a participatory worship and gives congregants an actual hand in creating their space and community, every day they are here and not because they're on a committee. This ruach/spirit is evident from your first visit to Shir Tikvah; it enticed Rabbi Rosenberg.
- The building's architecture and layout creates intimacy. When we are rocking, we are literally on top of each other. And that brings warmth and energy; we can fill the space! The office space, on its best days, fosters (or forces) a collaborative environment.
- We own the building. That's not a casual thing; not having mortgage payments is a relief every month for our tight budget.

- Minneapolis is home base, even as our congregation hails from many places. The neighborhood is leafy, mature, safe, and has nearby amenities that are welcomed by congregants. It accommodates our St. Paul roots at least in so far as it is not so far away. To sum up, southwest Minneapolis does not seem to be a constraint as we consider what next; Minneapolis is.

There are ways in which our facilities are frustrating our mission, according to those we talked with and from our own observations:

- The sanctuary is increasingly beyond capacity. On our busiest days, mostly worship but some community meetings, we are well beyond the legal limits of the space. And that cramming also means that we don't appear as hospitable in the physical world as we are in the emotional one. We appear stuffed. For a big b'nei mitzvah or the MLK service or any number of other events, aisles—a basic safety protocol, a thing that makes people feel welcome and serves the psychological needs of at least a few—are a fantasy. We are filling up more often than we used to and even mild growth will result in some finding themselves unexpectedly crowded out some days.
- The bimah sometimes fall short of our spiritual needs; when a modest-sized group being honored with an aliyah leads to jostling and people standing far to the outside of the torah reader, we have not succeeded in creating the intimacy we want, even as we are crowded!
- This building, despite some modest improvements, simply does not serve the needs of those experiencing mobility challenges including those who use a wheelchair, a cane, a walker or those with physical limitations. There isn't a single handicapped parking space nearby. This is not hospitality, let alone radical hospitality.
- There is insufficient parking for people for whom parking is a high priority. There is no clear place for drop-off and pick-up and this affects many constituencies.
- Our staff is, quite literally, on top of each other. Meeting spaces, spaces to rehearse, quiet spaces to meet with congregants, storage space for longer term storage and dedicated supply cabinets, all of these things are wanting. And our cooks produce brilliance from a constrained kitchen with minimal staging space.
- We struggle to find adequate educational space. Renting Park Board space is an ongoing expense and some feel that not being in

the building has a cost for those classes, including that teachers can't store supplies or decorate. The anticipated modest growth in our school population will exacerbate these issues and hampers our ability to offer classes and learning opportunities to parents and caregivers while their children are studying. While the flexibility of the sanctuary is admirable, it is the only of such space for meetings beyond a certain size.

- The building's infrastructure is aging and maintenance will be a growing cost. There were concerns among some about a mustiness in the building, particularly in the basement, which causes some (currently unsubstantiated but possibly quite real) health concerns.
- It is near impossible to generate other income from the space – a daycare, a kitchen incubator, etc. – because of usage constraints and outdated spaces.
- Restrooms? Not enough and just one accessible.
- Although hard to identify a source in the quantitative data, and not voiced in this way per se in the qualitative work, it seems quite possible that the building itself is acting as a psychological barrier to our becoming all that we could be. Just as the step to a third ordained clergy produced some discomfort about whether we were worthy of being a three-rabbi shul, the building as it stands today resonates more with who we were than who we will be.

Identified options

Broadly speaking, only three options exist.

Option One: Stay put, do what is absolutely necessary to maintain the space, and tolerate it. We would pay for the things that break and that's about it. This approach would require us to at least explore complicated questions of limited membership and school enrollment. The F.A.G. does not believe this a wise course. At some point, perhaps soon, the congregational needs will tip us from a radically hospitable growing congregation using its spiritual and human resources to do justice in the world (and therefore growing), to a place where people are either left out or turned off because they can't reliably participate and a place where staff and congregation must increasingly engage the building and its problems rather than the world and its problems.

Option Two: Stay and invest. This might include an elevator, ramps, an addition to the south or west, or other creative reworking of the existing space. This would be an enormous range of possibilities and costs. We don't yet know enough to know how many routes might be available here.

Option Three: Move. Moving comes in four flavors: move in with someone else (partner), move somewhere else on our own, move somewhere else to create something new, and move into something new we've built. The F.A.G. rejects the last of these, the idea of building something new from the ground-up, as outside even our most fanciful budgets.

Evaluation of the options

We have some sense of some of the questions that might be asked of each of these options, but more work needs to be done to determine which options should get our attention and limited resources. Ultimately, we are proposing that the Board consider two options: remodeling our existing space (which, to be clear, requires professional help and funds to understand the spectrum of routes available) and exploring a partnership for shared space (a prospect with many possible partners but which is currently most mature with First Unitarian).

We will write more on the two recommended options shortly, but there is a third route that deserves some consideration: retaining a professional to tell us what space is available out there and consider moving to an existing but new-to-us space, perhaps even to other spaces that could house Shir Tikvah and a sympathetic other tenant or tenants. Retaining a commercial real estate agent would require us to know enough about ourselves to be good clients, in addition to requiring some dollars to get the process started. Often, agents in this field are (ultimately) paid by the sellers following a successful transaction. We would need to be upfront about our likelihood of closing a sale with whoever we were working with. An agent might also be willing to work on a different basis, but we would want to negotiate upfront a "not to exceed" number and a scope of work.

We do think we want to pursue this, but not with all cylinders, as attention is one of our limited resources and this seems to have a greater likelihood to be barren than the others. We would need a facility that meets our needs, which can't be worse in any material way than the space we have and which has to be better in other materials ways. Once a facility is identified, we have to consider whether we want to lease or buy (or a more complicated lease-buy-back sort of structure), the related costs, and the yield and time it would take to sell our current building. We would likely still have to consider meaningful renovation costs in any new space. It would be thrilling to consider whether a multi-faith space could be created from the ground-up and there would also be legwork to be done in exploring that option. A building swap (and we have a glimmer that St. James Episcopal on Minnehaha Avenue a few blocks short of the Falls could be asked) might also be explored under this option.

Stay and invest

This would be a congregational effort to make a plan for as many investments and improvements as we can afford, even stretching ourselves with a capital campaign to do so. The breadth of possibilities means we need professional help. We have to figure out how much we could afford and whether what we could afford would meet our needs not only now but in the foreseeable future. We have to wrestle with the Americans with Disabilities Act. We believe this is a very viable option but we can't take it further without the Board agreeing to spend money to get help.

Move into some sort of partnership

Partnering means sending out feelers for what might be available and getting to know First Unitarian Universalist now. There is presently a potential for a partnership with First U, our High Holidays home, the recent site of staff b'nei mitzvah and the adult b'nei mitzvah. As identified above, there are many questions that come with a partnership: the legal structure, the melding of two schedules and philosophies, and even the basic question of whether we want to be an owner or a tenant (or, whether what it takes for us to be us is benefitted by some particular relationship with the building we occupy).

First U and Shir Tikvah could consider sharing space in the First U space, or maintaining two campuses. At the highest level, the positives for a shared space with First U might be:

- First U was originally built as Adath and retains both Jewish architectural elements (outside and inside) and has some emotional resonance for some congregants who worshipped there years ago.
- First U is a somewhat but not significantly larger congregation with values and commitments to doing justice in the world that are very much in harmony with ours.
- First U has dedicated handicapped parking, a significantly larger sanctuary, an elevator and ramps (although not perfectly situated), a dedicated education wing which comes close to or meets our current classroom needs (with some other space available for use), a significantly improved kitchen, and it is located nearby.
- First U's calendar and our calendar rarely conflict, with the exception of our Sunday school and their Sunday school/services.
- Together, First U and Shir Tikvah's use of the Dupont building would be full-time, an environmentally responsible and economically efficient structure. The two congregations would have a wider financial base to support a building (or two).

- Together, First U and Shir Tikvah may be able to do more good in the world for some specific projects or events than they might be able to separately – there's some mission synergy.

At the highest levels, areas of concern are:

- We could not teach Sunday school on Sundays. This would be a cultural change.
- The building has deferred maintenance issues. This may be addressed by their capital campaign.
- Various complications of shared space, including maintaining a solid identity.
- There's currently a daycare operating until 6 or 7 pm in the education wing. It is a First U subtenant with about 18 months left on the lease.
- First U already has a shortage of office space at Dupont. (Could the Minnehaha building alleviate that?)
- The Shir Tikvah shuffle matters to what we do; it creates an active and participatory involvement

Currently, First U is wrapping up an intense, successful capital campaign. They've cleared \$5 million, with pledges payable over five years. They have a committee thinking about how to spend the money. Included in their wish list, with priorities being set now: retiring their mortgage, deferred maintenance, increased office and/or classroom space, a refresh of the sanctuary space, a clearly demarcated entry and improvements to wayfinding through architecture within the building. Many of these wish-list items would inure to our benefit and address our needs to if were in shared space.

We have had a few small conversations about whether this is worth exploring. It appears that it is worth exploring from the perspective of First U's leadership. A small group (Luke Weisberg, Bruce Manning, John Humleker and Rabbi Lutz) are currently working with First U to set up a meeting or two to determine whether there is sufficient interest on both sides to continue discussing things.

We don't believe that First U is necessarily the only potential partnership option out there, but it is the one we know most about at this point and for which we already have some partnership and affinity.

Conclusion on the options and a plan of attack:

Note that the F.A.G. does not have – and has not produced – a timeline for how urgent this might be or what progress benchmarks Shir Tikvah should set. We also have not identified the costs associated with these routes or developed a fiscal plan for these options.

The chart below summarizes each option and identifies what might be the first steps for each of the preferred routes. This is a separate question than what to do next with the congregation.

Options	Committee’s view	Recommended next steps
Stay and do nothing	Not a reasonable option	Not recommended.
Stay and invest A. low-end: ADA only B. mid-end: move walls, expand, ADA C. high-end: to the studs, blue sky	A. not ideal, addresses very few of our needs B. may be a good idea and feasible? C. may be a good idea and may not be feasible?	All three sub-options: Engage an architect, who we will have to pay (likely the initial consultation would be free) to get us real information, estimates and drawings on at a variety of points on this range.
Move A. partner with First U B. develop ideas for other options for partnership C. move and renovate D. move and lease E. move: buy and build	A. Worth exploring B. Could lead interesting places, but takes the finite resource of attention C. Worth exploring but perhaps to a lesser extent than both “stay and invest” and First U D. Same as C above E. Not financially feasible, not recommended	A. Select leadership meeting with First U (already in process) B. Figure out what we can learn about possibilities from other local clergy or through an RFP? C. Engage a commercial real estate agent and appraiser to analyze market options here D. Same as C above E. None, not recommended.

Board and congregational engagement

As the Exec and the board move from this committee’s work to running down some of the identified paths, the congregation will eventually need and want to be involved. A congregational engagement plan must be developed. We would suggest that the congregation not be asked to start the space assessment from scratch, but to at least

start by affirming and recognizing what we've learned from our work with the heavy users of the building. We believe the congregation should be guided by the Board in assessing the preferred routes. And we believe the Board should support the entirety of this exploratory project before it moves forward.