



How did we arrive at leaning in to co-location with First Universalist?

An update about “what facilities do we
need to do our work in the world?”

*October 2018 congregational meetings –
a summary of the presentation*



Shir Tikvah
שיר תקווה

This is a shorter summary of the information presented at three congregational meetings in October 2018. The meetings were announced shortly after congregational president Bruce Manning's remarks at Erev Rosh Hashanah. Those remarks are available [here](#).

The meetings were designed to (1) update the community on the reasons for and the work behind the Board's decision to "lean in" to co-location with First Universalist and (2) gather congregational feedback about excitement and concerns as the Board and to-be-created working groups "lean in" to the possibilities of co-location. Over 120 congregants attended the October 2018 congregational meetings and the presenters fielded more than 50 questions from congregants during those meetings. This summary does not attempt to capture all of those questions or answers. Readers are advised to consider that the presentations went over an hour each and this summary attempts to address the key elements.

The phrase "lean in" is intended to convey the Board's commitment to an honest and thorough exploration of the possibilities of co-location at First Universalist. Nothing has been decided yet, but the intention is to try to solve the concerns and problems that are apparent in co-location and work toward positive solutions that harness the potential for our congregation to succeed in living its mission.

For your convenience, what follows is an internally hyperlinked table of contents for this written report. Other hyperlinks in this document lead to external sources.

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We are a success! In 2011 and 2012, under Jane Binder's leadership, the community drafted and adopted this vision statement:

Shir Tikvah is a *kehillah kedosha* (holy community) joyfully revealing the intersections of *talmud torah* (lifelong Torah study), *t'filah* (prayer), *tzedakah* (justice), and *hachnasat orchim* (radical hospitality). We creatively wrestle with tradition and innovation as we invigorate Jewish spiritual life and transform the world.

By living into our mission, we're a Jewish organization rising however you might measure it: in membership, in budget, in reach locally and nationally, in lives uplifted. And that success has come with some growing pains, both in our budget and in our building. In 2016, under Luke Weisberg's leadership, the Board set three priorities for our future work: racial justice/equity, our educational programs, and our facilities.

The Facilities Assessment Group's report. The Facilities Assessment Group was created in November 2016. Its membership was Amy Funk, Kay Harris, Judy Hollander, Eli Kramer, and Greg Leder. It was chaired by Bruce Manning. The Group's charge was:

- Update our understanding of our current, near-term and long-term facilities needs
- Assess the current facility
- Recommend options to pursue
- Outline the process of pursuit

The Facilities Assessment Group interviewed all staff members, reviewed the historical materials on our current building, reviewed the information previous leaders had gathered and created in considering our space and plans for the future, and investigated other religious co-location arrangements nationally. The Group also did some estimating of future membership, school enrollment, and days when the building would be at maximum capacity. In just the year since the report was written, the congregation has matched, a year ahead of estimation, the "high growth" scenario for membership (~500 family units) and Sunday School enrollment (~220). This year, at the Earle Brown Center, we surpassed our 2021 High Holidays "high growth" assessment, which was 763 people. (The Board has determined that our facilities work will *not* be driven by looking for a sanctuary sufficient to hold us on these our most well attended days.) A final report was accepted by the Board in September 2017 and is available [here](#).

Readers are directed to the report for a deeper and more nuanced understanding of the Facilities Assessment Group's work. Still, a poetic summary of the report's view of the strengths of the current facility might be this:

This intimate building,
which we own,
in its convenient leafy neighborhood,
houses joyful and profound memories
and supports a participatory style of worship.

The report also identified the challenges of our current facility. Here's a similar poem:

This aging building
does not embody our commitment to radical hospitality
and speaks to who were rather than who we are becoming.
It constrains our creativity in our programming.
It has very limited access for those with mobility issues
and there are not enough restrooms.
It packs us in the sanctuary
and on the *bimah*
and in the classrooms
while stacking our staff in their working spaces.

Following the acceptance of the report by the board, there was a congregational meeting in November 2017 (50ish attendees) and, after additional work and exploration to be explained later, there were a series of eight listening sessions held in April 2018 (100ish attendees) to identify building features that would promote Shir Tikvah's values of radical hospitality, lifelong learning, prayer, and tzedek. From the listening sessions, Rabbi Rappaport produced a word cloud. The listening sessions used, among other tools, "dot voting" wherein attendees showed the strength of their preferences among a listing of concepts they themselves had identified. The larger the text in the word cloud, the more support it received.



Fall 2017, the Board's next steps. The Facilities Assessment Group's report proposed three options for the Board to investigate. It is worth pausing here to consider that there is no 100% guaranteed, get-your-money-back, correct answer to the work the dilemmas posed by the challenges of our facility. The Board has committed to operating with good faith and integrity, trusting that a smart process will produce a positive result. The Board set up three committees to pursue the three options simultaneously:

1. Stay at 1360 Minnehaha Avenue and invest. (Led by Howard Orenstein)
2. Look to lease or buy (and perhaps sell 1360 Minnehaha Avenue). (Led by Kay Harris & Judy Hollander)
3. Co-locate. (Led by Bruce Manning)

The October 2018 congregational meetings provided additional information on each of the three paths, with an emphasis on why a particular co-location option is our focus now.

Throughout the explorations discussed below, the Board relied heavily on the [Caryl Barnett \(z"l\) Vision Fund](#). Caryl, a founding member with great flair and joy, decided, before she died of cancer, that she wanted to give a gift to the synagogue. The monies she raised have allowed the Board to see further than we could otherwise (a delicious irony because Caryl was blind) and a welcome gift because our operating budget does not otherwise allow for us to fund out-of-the-box thinking. You can still support this fund if you wish, [here](#).

Option 1: Stay at 1360 and invest. We began assessment of this option by commissioning our usual engineers, [Gilbert Mechanical](#), to audit our current building's mechanicals. We paid for it using money from the Caryl Barnett (z"l) Vision Fund.

There are significant and urgent maintenance issues in this building. The vintage 1948 steam boiler and associated machinery is at high risk of failure at this point. Likely repair costs: \$95,000 would bring it to code, but would not make it efficient or fix steam trap problems (which could cost many thousands more). In fact, we spent ~\$5,000 this summer to try to buy more time with this equipment. Replacing the boiler with a high efficiency water-heating system would be more than \$240,000 by Gilbert Mechanical's estimate. The building's piping is asbestos-wrapped, and the interior of the boiler may be as well. This pricing does not account for proper abatement expenses. The compressor system (also 1948) will need \$5,000+ of repair and/or certain room-heat valves need to be updated. The electrical panels (original) are outdated and underpowered: \$40,000. There are other less-critical but important deferred maintenance issues.

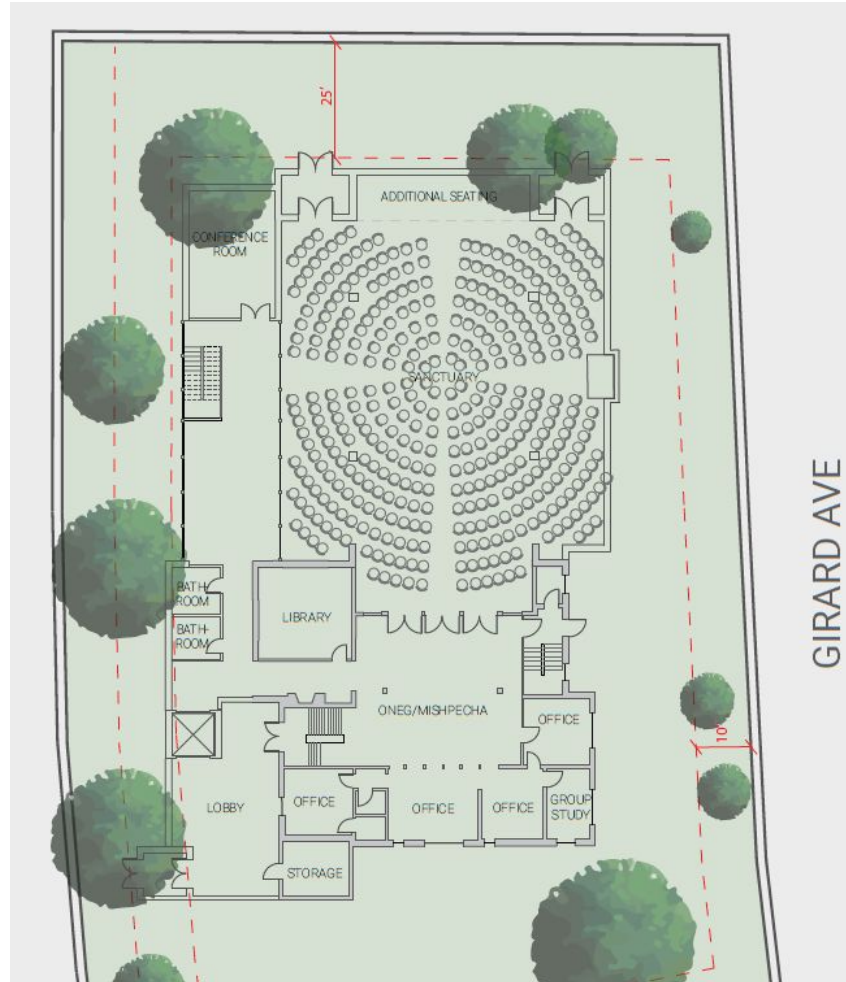
Using money from the Caryl Barnett (z"l) Vision Fund, we retained Mohammad Lawal of [LSE Architects](#) to consider how to improve our building. Mr. Lawal assessed the space, met with staff, met with committee members, reviewed the Facilities Assessment Group report and the congregational word cloud, and delivered some high-level design concepts for us to consider.

In Mr. Lawal's assessment, "In summary, there are significant opportunities to expand Shir Tikvah at its current location based on our preliminary review.... There are significant challenges to be studied should Shir Tikvah decide to remain at the current site and location. We do believe that there can be a phased approach to bring the current facility to meet accessibility needs and then expand the sanctuary/remainder of the facility

with more significant capital investments.” Of particular note here is Mr. Lawal’s acknowledgment of the possibility of a phased approach.

It is also necessary to understand that Mr. Lawal’s work, which was delivered to the relevant committee and the Executive Committee in lovely large-format prints, including a number of possible layouts, square footages, additions and reworking of existing space, is reliable but preliminary. The drawings were intended to show that it is possible to deliver some remodeled and new space at 1360 Minnehaha. They are not anywhere near final drawings, or even the result of the full process in which one would engage to move forward with remodeling/expanding at 1360.

The drawing below is one of many Mr. Lawal created and is provided here to understand his comment on the phases of the proposed work. The sanctuary shown in this drawing and any expanded sanctuary at 1360 short of a tear-down, would have load-bearing columns obstructing the view for some seats. This drawing shows moveable chairs arranged in a circle.



In the bottom left corner of the drawing, where the current courtyard where you can sometimes find a *sukkah*, is a new lobby and a new elevator. This lobby would be at grade level to the sidewalk and would provide access half a floor down to the basement and half a floor up to the sanctuary and a floor-and-a-half up to the current second floor. To connect it to the rest of the building if done without a global remodel would consume some existing classroom space. This elevator-and-lobby work is what Mr. Lawal proposed as Option 1.

We asked Mr. Lawal to provide a very rough cost estimate for construction of this space, based on industry standards, his understanding of the building and finishes, and his own drawings. Excluding his own charges, Mr. Lawal reported as follows: ““The conceptual budget ranges are listed below:

1. Option 1: ADA upgrades including addition of an elevator/new lobby (\$1.5M to \$2.0M) – approximately 1,000 – 1,200 square foot addition.**
2. Option 2: [remodel and addition, including ADA upgrades and elevator] (\$7.5M to \$9.0M) – approximately 25,000 to 30,000 square feet [in total].**
3. Option 3: New Building 30,000 to 35,000 square feet (\$12M to \$15.6M)”

** This does not include the expenses revealed by Gilbert Mechanical of perhaps \$150,000 to \$285,000 or more. This work would have to be done to support the remodeled space and bring things to code.

Mr. Lawal’s numbers are, as he writes, conceptual. They are also preliminary.

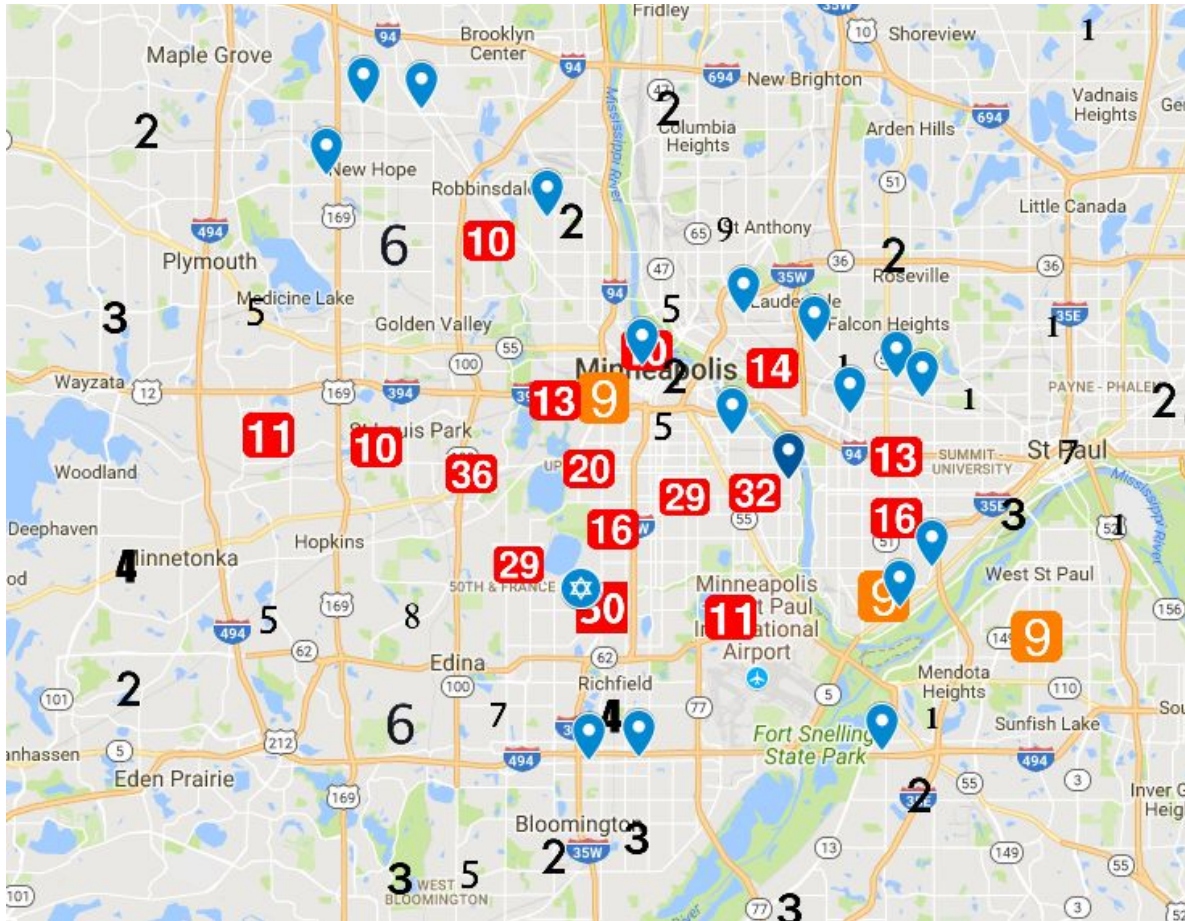
We did additional diligence on Mr. Lawal’s work and asked a professional to give a thorough independent estimate of potential costs. That detailed cost estimate considered the full-remodel, noted above as Option 2. It landed on a costs of \$10.1M. Mr. Lawal then reviewed and commented on those numbers. It appears that the major discrepancy is accounted for in Mr. Lawal not including architecture charges, permitting fees, and the like, and the second estimate including such things.

Option 2: Buy or lease somewhere else. Selecting among a number of bidders, we entered into a contract with Cushman & Wakefield to act as our brokers in looking to buy or lease different space and, if part of any move, sell this building. The arrangement is without cost to us – they will get paid on purchase, sale, or lease.

C&W is not sure of the listing value of our building. If sold as-is, the Gilbert Mechanical information decreases the price. If sold for redevelopment, the buyer will need to navigate the City and the neighbors. Price could be \$1M to \$1.5M or more. We would look to their guidance for the appropriate listing price and strategy. The amount of time the building might sit on the market is also not clear.

In working to understand us as they represent us, C&W has reviewed the Facilities Assessment Group report, met with us to understand our parameters and interests, and is guided in their work by a document setting forward our needs and desires. They also reviewed this map of where our members live, sorted by zipcode (from October 2017).

C&W has sent us 30 properties to review, some for sale and some for lease. So far, none of these properties have stood out. As with remodeling or co-locating, the properties represent a mix of successes and compromises. So far, however, the costs and demerits have heavily outweighed the positives. Further, each of the places we have considered would require remodeling work in addition to whatever the acquisition or lease costs would be. Prices have varied widely, none of them low, and because none of the places have seemed plausible, pricing is not worth dwelling on at this time. Furthermore, the properties currently available do not have a even a decent geographic match with the bulk of our congregation. Here is a map of considered properties, shown in blue pins, set against our congregants' homes, which are shown clumped by zipcode with red or black numbers:



C&W has also had some frank conversations with our team. Our needs are rather specific and while we have been encouraging creativity and flexibility in type of building, previous use, current use, neighborhood and architectural style, there are not a lot of good options. The market is tight for the the likeliest kinds of spaces and because it is tight, spaces move quickly. We're also a deliberative body. Unlike Widget Making, Inc., we do not hand off the decision on where to site our factor to the VP of Operations and let her team make the decision which will then be announced by fiat to the company's employees. Ours is a smart and inclusive process suitable for our organization. Typically, buyers come to the table with financing and 20% down. We don't have either of those things.

Option 3: co-location. We looked at two local co-location options in depth. The first is not a good match; lovely people with a lovely building with great potential who were ultimately looking for a landlord-tenant relationship, which is not what we are interested in. The focus right now is on [First Universalist](#) at 3400 Dupont Avenue South.

First Universalist, 3400 Dupont Ave S., was mentioned and studied in the Facilities Assessment Group report and the work leading up to it. Even before the report, there had been some conversations with First Universalist leaders and Shir Tikvah leaders. Those conversations have continued since. First U has recently completed a capital campaign and will be remodeling shortly. There is, however, *new* construction space available for us.

Using money from the Caryl Barnett (z"l) Vision Fund, we authorized a limited retention of First U's architects (Miller Dunwiddie) to explore co-located space. A few key notes to understand here, which I will put in bullet points so you don't miss them:

- While we are and will remain two separate entities and religious traditions, there are common elements of our missions and practice around social justice and racial equity.
- Our clergy team and their clergy team determined that we cannot share the existing sanctuary and each meet our worship needs. Meeting their own worship needs is a non-negotiable item for each congregation.
- Although the building was built as a synagogue (and will retain Jewish architectural elements post-remodel because of historic preservation rules), the existing sanctuary space is not to our liking for regular services.

Generously and with excitement at the potential, as well as an understanding of the work that would need to be done, First Universalist's board voted at the end of August to delay their remodeling work in order to explore co-location with us.

The 3400 Dupont building already has a number of features of interest to us, each of which were identified as needs for Shir Tikvah by the Facilities Assessment Group report or in congregation's April 2018 meetings as shown in the word cloud above:

- an elevator, and all parts of the building would be accessible
- handicap parking
- 40+ additional off-street parking spaces

- a drop-off location
- a larger kitchen
- more classrooms

Post-remodeling, the building would have updated mechanicals and could also have improved green space/playground areas, and some outdoor event space. You can compare this list with the word cloud by clicking [here](#).

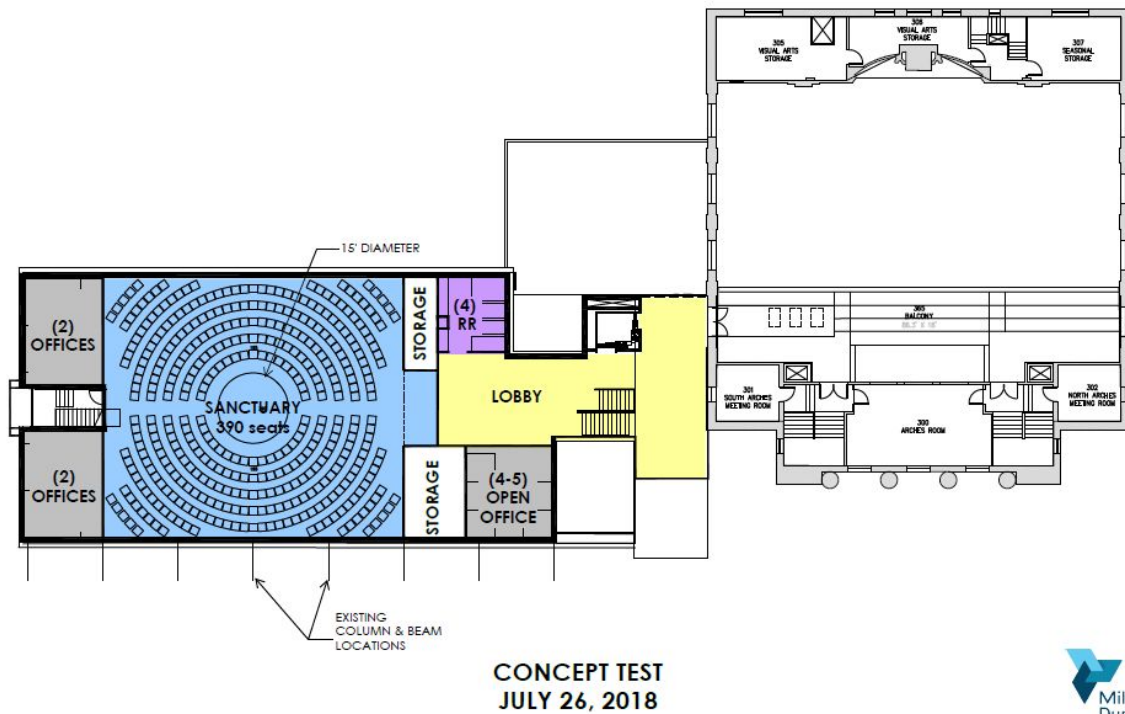
We have the opportunity to create a *new* third floor on top of the Education wing of the current building, which would be our own dedicated sanctuary space: Jewish and designed by and for us. The information below is based on the proof-of-concept drawings done to determine if the new third floor could hold a sanctuary space and our basic office and storage needs. It is not a floorplan we are committed to and, in fact, likely does not represent the smartest and most efficient co-location arrangements for all of the spaces we would share within the building. But we asked for the work to be done to understand the potential.

It is estimated that the new sanctuary would seat 390 in the round in chairs. It could seat 420 in east-facing rows of chairs, with a 15' front area and 2 aisles. The span of the 18-foot ceiling would be unobstructed (which is not possible even in a remodeled 1360). It would be wider & deeper than our current space, which was planned to seat 180 to 220. The current vision is for an 18-foot ceiling on a portion of that floor, with maximum glass to the east and west. On this floor, there could be 4 all-gender stalls (with shared sinks), 4 offices, open office space for 4-5 and storage for tables and chairs. The current court is 16-plus bathrooms elsewhere in the building, some all-gender in design. Post-Shir-Tikvah shuffle, the sanctuary space would seat 230. The Chalice Room (first floor), if it remains, could seat 70. The Social Hall (basement) could seat 230 in rounds or some 500+ in beer-hall-style tables. In its remodeled form, there could be 12 classrooms available elsewhere in the building. In its remodeled form, there could be 9 meeting rooms available elsewhere in the building. In its remodeled form, there are 2 places other than our sanctuary for larger groups (the Social Hall, the First U Sanctuary).

Miller Dunwiddie created this concept sketch, looking north along Dupont Avenue toward 34th Street:



The next draw shows a putative floor plan for the additional space, again with an understanding as optimal co-location arrangements were designed it likely would not look like this.



The Arches Rooms and two conference rooms, in the old Adath building and shown to the right of the floorplan above, would be accessible spaces from the third floor lobby area shown here, by virtue of bringing the elevator up to the third floor of the sanctuary building. Again, our putative sanctuary is shown in the round, with moveable chairs.

As with any construction project of this magnitude, there are a number of important unknowns, including addressing the Historic Preservation designation on the original sanctuary building. This has already been assessed by Miller Dunwiddie. At one point, First Universalist was considering adding their own third floor to the education wing. In the process of doing that, Miller Dunwiddie considered both the Historic Preservation designation and some estimated construction costs. When estimating for a third floor that was made up of classrooms, Miller Dunwiddie estimated construction costs to be \$2.5M to \$3M. To that, we'd be adding the HP-process expenses, the unobstructed span, and the usual unknowns. The number does include a cushion (as does the number provided in estimating remodeling at 1360).

Rough cost comparisons: It is difficult to project costs with tremendous accuracy but we believe we know enough to understand the general relative magnitude of things. These numbers should be understood with that enormous caveat in mind. The first phase of the remodel plan (elevator and lobby) would cost, if you included the Gilbert Mechanical infrastructure repair costs, \$1.8M to \$2.3M. The remodel at 1360 including the elevator/lobby and the additional classroom, offices, etc. and the Gilbert Mechanical charges could cost between \$7.8M and \$10.4M. (and that does not include the costs of finding ourselves a home during construction). The co-location at First Universalist, for the construction costs, could be between \$2.5M and \$3M (caveats above) *except* that we would have the proceeds from the sale of our building to apply to reducing those costs. As noted above, those were roughly estimated by C&W as \$1M to \$1.5M. As a general matter, it seems worth assuming that in each of these ranges, the true number will be at or higher than the higher end of the range.

Radical hospitality costs money. We are not “consumers” of a “synagogue product”; we are co-creators of this holy community, partners in this sacred work. Our budget is a reflection of our values and our priorities. As the builders and sustainers of Shir Tikvah, we all must know the financial picture of our congregation so we can each do our part and plan for our future.

John Humleker and staff have consistently managed a budget that minimizes expenses. We have accumulated a deficit over time so while we don't run deficit budgets, when we miss our target by overspending (rare) or under-fundraising (much more common), we accumulate a running deficit. It currently sits at \$104,000. (As an aside, this may make us a tough candidate for a competitive loan.) The operating budget each year allows us to (barely) do what we do. In fact, our staff, a line item totalling 72% of our expenses, does amazing work without sufficient support. Our budget doesn't have dollars for ambitious projects. Addressing our facilities is an ambitious but necessary project if we are to live our mission.

The reader is strongly encouraged to visit the [Financially Speaking](#) portion of our website for a greater discussion of this information. It is, simply put, critical that the congregation rise to the challenge of delivering our mission - not just with their feet and their voices and their hearts and their hands but also with, where they can, their wallets. Whether we co-locate or

not, the financial position of the congregation must be improved to continue to live our mission into the world from a place of strength.

Using money from the Caryl Barnett (z"l) Vision Fund, we authorized a limited retention of Kim Snyder and the [Excelsior Bay Group](#) to assess our financial capacity for capital-campaign fundraising. This work is still in process, but we have some preliminary views already that suggest that the full remodel at 1360 is out of reach absent some pleasant surprises featuring an integer followed by a lot zeros before the decimal point. If you're interested in making such a surprise happen, please contact [John Humleker](#) immediately.

Co-location: what next? To be clear again, no decision about moving in has been made, either here or at First Universalist. Instead, the Board, and now the congregation through feedback provided by you following the October 2018 congregational meetings, has been gathering questions, concerns, areas of excitement and areas of anxiety. There is a LOT of information here. We invite you to take a deep breath, review it as many times as you need to, know that there are still many unanswered questions- getting those answers is the next stage.

A summary of the feedback from all three community meetings will be shared with the Board at its November 1 meeting, and questions and concerns will also be directed to any relevant facilities-related work groups and we will collect and consider the feedback you offer to this written summary.

In keeping with the *minhag* of Shir Tikvah, we ask people to take responsibility for their opinions. We don't accept anonymous feedback. You can share your comments, thoughts, and ideas about the exploration of the possibility of co-location. We have established an email account (st.hopes.and.dreams@gmail.com) where you can also share comments. These emails will not receive individual responses, but rest assured that all emails will be read and brought to the Board and/or other facilities-related work groups.

If there's a conversation you want to have about the process of "leaning in" to possible co-location with First Universalist that calls for an individual or time-sensitive response, please contact a member of the Board, the Executive Committee, clergy, or staff member with whom you think it would be most helpful to engage in that conversation.

Final caveat: We're always learning here at Shir Tikvah. We, your Board, explicitly reserve the right to rethink things, to get smarter and to change our minds in light of new information or old information we just discovered or understood. We're doing our best in a tricky journey and are ever grateful for your co-construction and co-leadership of the beautiful thing that is Shir Tikvah, our collective song of hope.