

Effective, Mission-Oriented Synagogue Mergers

Alice Mann
and Robert Leventhal

Merging is not a new strategy for synagogues in the New York metropolitan area, but conversations about mergers have gained new urgency since the economy began to deteriorate rapidly last fall. More and more synagogue leaders feel compelled to consider:

- ♦ Could a merger be a good option for us?
- ♦ How ready are we as a congregation (and as leaders) to embark on this challenging journey?
- ♦ What best practices can we adopt from other settings?

Last fall, UJA-Federation of New York engaged the Alban Institute to lead a Synagogue Merger Project in 2009 involving Long Island congregations that wish to explore the merger route. The project is aimed at increasing the odds of effective, mission-oriented mergers.

Defining Success

Whether we are talking about businesses, secular nonprofits, or synagogues, we know that many mergers do not fulfill the hopes and expectations of the constituents that approved them. A 1999 global study of business mergers by KPMG, *Unlocking Shareholder Value*, found that many corporate mergers fail



ALICE MANN

to enhance shareholder value, even though executives rated the mergers successful. Similarly, our experience suggests that in many church and synagogue mergers, the resultant congregation shakes out to be no larger — and no more vital — than the larger of the partners going in. To provide some benchmarks for synagogue leaders, we would define a successful synagogue merger in two words: *effective* and *mission-oriented*.

Effective synagogue mergers establish a disciplined and transparent process for working through issues. At appropriate moments, leaders bring to the table complete and accurate information about current realities and overall trends in their synagogue's finances, membership, and participation.



ROBERT LEVENTHAL

As the process proceeds, conflicts are addressed openly and creatively. The resulting merged entity is a healthy and functional organization, and the early sense of “us” and “them” is transformed into a strong, new “we.” But effectiveness is only half the equation.

A mission-oriented merger generates a fresh sense of identity and purpose in the resultant congregation — often underscored by a new name, new leadership, a new location, or all three. The old lament of decline, or the “problem story,” is replaced by a well-grounded vision: a compelling story about an attainable future, illustrated by new actions today that provide both a taste of what can be and immediate learning about

Continued on page 2

Introducing Connect to Care

“If your brother becomes impoverished and his means falter in your proximity, you shall strengthen him . . . so that he might live among you.”

— Leviticus 25:35

Jonathan Plutzik and Roberta Leiner

In these troubled economic times, hurt is everywhere and our Jewish community is filled with people who are struggling. Some were near the edge of poverty and have been pushed over the edge by the downturn. Others were middle class and even more affluent, but have seen their lives turned upside down in recent months. The demand for a range of services, from career programs and legal services to emergency food to cash assistance and mental-health support, has increased dramatically.

To respond to the extraordinary need, UJA-Federation of New York is launching Connect to Care, a holistic, comprehensive initiative that will locate vital direct services, as well as appropriate information and referrals, in seven multiservice centers throughout New York City, Westchester County, and Long Island. Lead agencies — network human-service agencies and Jewish community centers — will be designated to coordinate and provide a seamless array of services on-site in both synagogues and agencies. Connect to Care builds on the platform of Partners in Caring, which has already brought social workers from our network of beneficiary agencies into more than 100 local New York synagogues. This new investment over the coming year will, with your help,

serve thousands of people in the New York Jewish community.

The rollout of the local service centers will be staged over the coming months. In each case, a regional project coordinating committee comprising representatives of direct-service agencies and area Jewish institutions, including synagogues, will help shape project structures and services. The committees will ensure that members of the Jewish community are informed about the availability of services. Orientation opportunities will be available for all local synagogue clergy, and you will be kept informed through Synergy e-mails and by the lead agency in your area. A new Connect to Care website will provide up-to-date information and a forum for synagogue leaders to share ideas.

Connect to Care will extend services in other ways as well. For immediate help for referrals, UJA-Federation's Resource Line will be expanded.

Our hope is that Connect to Care will enable us together to strengthen and lift up those in our communities whose means have faltered. We welcome your help and suggestions.

Jonathan Plutzik is chair of Connect to Care and a chair of the Synergy Coordinating Council. Roberta Leiner is managing director of the Caring Commission.

Continued from page 1

what it will take to get there. Both the larger vision and the concrete actions address demographic and cultural challenges forthrightly. Leaders discover new passion and build new competence for outreach to unaffiliated Jews, including adults without school-age children. The new congregation pursues excellence in a few signature programs that clearly embody and enact its core identity and purpose. New program initiatives are nurtured and supported by a revitalized board. And the excitement of the new motivates the most talented and committed leaders from both congregations.

What could help merger partners realize this potential? The KPMG study lifted up three “hard” keys to success — factors we might logically have predicted. The first is business “fit” and synergy; in other words, it is important to choose a partner with complementary strengths and assets. The second is integration planning, that is, careful attention to the way separate business structures are reassembled into a new and effective whole. The third is due diligence: accurate and relevant information available right from the beginning, so that the planning is based on reality. All of these elements are clearly major factors in the success of a synagogue merger.

What might be more surprising is the emphasis KPMG placed on three “soft” keys to success, including management team selection, sensitive handling of cultural issues, and excellent communication with employees, shareholders, and vendors. Even in the hard-nosed world of business, these factors were shown to have a greater effect on

Continued on page 6



DRU GREENWOOD

From the director...

Shalom friends,

This year, Pesach's arrival comes with an added sense of urgency. Preparations always entail a hurried, deep cleaning to remove the *chametz*, the leaven of our lives that weighs us down and prevents us from lifting our eyes to new paths; the turbulent economic environment of early spring 5769 has many of us already on high alert, seeking a footing in the fundamental values that alone can guide our families and our communities on the way ahead.

As leaders of New York synagogues, you know as keenly as any the current necessity of stripping away excess to focus on the timeless and excruciatingly timely values of compassionate and fair action on behalf of those who make up our congregations as well as the *kehillot* themselves.

This issue of the Synergy newsletter focuses on creative responses to the economic stresses on our community from a number of perspectives. First, many synagogues and synagogue movements have stepped up to the challenge of helping congregants find jobs. Rabbi Haskel Lookstein

of Kehillath Jeshurun, Rabbi Billy Dreskin of Woodlands Community Temple, and Rabbi Gordon Tucker of Temple Israel Center share distinctive ways their congregations provide networking, support, and volunteer and learning opportunities for congregants. Second, from a broader communitywide perspective and drawing on the strength of both UJA-Federation's network of agencies and local synagogues, Roberta Leiner, managing director of the Caring Commission, describes Connect to Care, a new multiservice center for displaced Jews built on the platform of Partners in Caring.

Turning the lens toward synagogue strategies for weathering the storm in ways that are expressive of their mission, Alban Institute senior consultants Alice Mann and Robert Leventhal delineate the elements

that lead to healthy mergers. Finally, UJA-Federation resources available to synagogue leaders are highlighted: the online *Greening Guide*, for an extensive listing of cost-saving measures for nonprofits; the Resource Line, for referrals; and Synergy communications, for synagogue-specific updates.

As the Haggadah teaches, it is a fundamental part of our covenant as Jews to hold on to hope and the vision of what can be as we act in concert to support one another. May you, your loved ones, and the *kehillot* you lead enjoy a sweet and kosher Pesach,

Dru Greenwood
Director of Synagogue Renewal
UJA-Federation of New York and
Synagogues Together

UJA-Federation of New York Resource Line For free, confidential information and referrals

Legal services, support groups, family counseling, immigrant services, employment and vocational training, loans, entitlements and benefits, cash assistance, senior services, and housing are among the services available through our professionals at Resource Line.

resourceline@ujafedny.org + 1.800.852.3337

The Greening Guide

UJA-Federation of New York's greening initiative includes a new guide for nonprofit organizations to help you both conserve resources and save money. The guide is available online only at www.ujafedny.org/publications.

Sign On for SYNERGY Updates

Synergy e-mails for presidents, rabbis, and executive directors of synagogues in New York, Westchester, and Long Island provide timely information about grant opportunities, conferences such as the recent Wiener Educational Center fundraising symposium designed for synagogue leaders, and a variety of community resources that benefit synagogues.

If you are not receiving Synergy e-mails and would like to, please forward your name, position, synagogue name and address, and e-mail address to Allyson Block at blocka@ujafedny.org. *Stay in touch!*

New York Synagogues Support Congregants in Need

As layoffs across the economic spectrum and throughout the metropolitan area have increased, often with devastating impact on those affected, many New York synagogue leaders have energetically and creatively mustered their communities to help. Some are opening food banks; others are seeking to protect the dignity of vulnerable families by instituting communitywide guidelines for modest bar and bat mitzvah celebrations. While projecting austerity budgets of their own for the coming year, they are actively, without stint, impressing on congregants their need to remain whole communities — including every person, every family, especially when financial reverses have disrupted their lives. As the March survey of the economic downturn's impact on New York synagogues showed, participation both in worship and in *chesed* activities have increased dramatically, even as synagogues have reduced overhead, planned more modest programs, and invited increased volunteerism.

Here are some examples in their own words of synagogue efforts to assist congregants.

Letter to the Kehilath Jeshurun/ Ramaz community:

Haskel Lookstein
Congregation Kehilath Jeshurun,
New York

The turnout for “Responding as a Community: KJ/Ramaz Addresses the Current Financial Crisis” was beyond anything we anticipated, reflecting enormous interest in the issues surrounding the current financial situation and its effect on our families.

For those who did not attend, we want to inform you of the many resources we are putting into place to assist the community. You can also visit the KJ website and access valuable handouts from the evening, including articles, resource assistance information, job seeking information, and more.

One of the exciting programs we are developing is the **Ramaz/KJ Career Development and Networking Initiative**, consisting of a mentoring

program, career coaching and industry networking events, professional online information exchange, and a KJ/Ramaz Business and Services Directory. This program is spearheaded by congregants, who can be reached collectively at kjramazcareers@gmail.com. During this time when many are in need of improving their resumes and refining their careers, we all should keep our ears open to job opportunities and forward information to these volunteers. Even if you are not in need of assistance, we can all offer help by mentoring or counseling others. I therefore encourage you to attend their next meeting for mentors, coaches, and coordinators.

For those seeking even more practical networking tips, please save the date for a **jointly sponsored workshop of the Orthodox Union and KJ titled “Surviving This Economy: How Our Community Can Make a Difference,”** where concerns regarding the current economic crisis and its impact on

our financial and personal well-being will be addressed in workshop format, including **Adjusting Your Budget to a Changing Financial Environment and What’s Hot, What’s Not: Retraining, Retooling, and Finding Employment** with experts in their fields.

Also, if you have a specific question regarding resource advice, we have dedicated a special e-mail address for you at 311@ckj.org. Be assured all questions will remain confidential, and we will get back to you as soon as possible.

Finally, it is very important during these challenging times that we **keep perspective**. While many of us are feeling anxiety and dismay over our bank accounts and mental well-being, there are others in the Jewish community who are struggling just to put food on their tables. It is in this time of crisis, even when we are all feeling the strain, that we must take action as a community to help those who are even less fortunate: the poor and hungry of New York. It is with this in mind that **KJ/Ramaz is proud to announce a communitywide *chesed* project to benefit the Metropolitan Council on Jewish Poverty, the leading nonprofit organization caring for poor, needy, and hungry Jews in New York. Please join us for the KJ/Ramaz Virtual Dinner benefiting Met Council. The reservation form is available at www.ckj.org/docs/VirtualDinnerInvite.pdf. For a mere \$18 per person, you will be a virtual sponsor of the dinner and receive discount coupons to your favorite kosher restaurants and local businesses. Please follow this YouTube link for your “virtual” invitation, starring Lenny Silverman**

and yours truly: www.youtube.com/watch?v=d1WPNT9wVzI.

In closing, please know that we are here to help, and that our community's response is evolving as needs become apparent. In the meantime, I hope to see you all "virtually" for the Virtual Dinner on March 1st.

The LinkedIn Project

Rabbi Billy Dreskin
*Woodlands Community Temple,
Greenburgh*

We are no strangers to the concept of reaching out to those who are in need. In the Book of Leviticus 25:25, we are commanded, "If your brother and sister are in straits . . . those who are nearest to them shall redeem them." More and more each day, many of our brothers and sisters are in straits, and from Mount Sinai more than 3,000 years ago, the call has come for us to help.

Woodlands Community Temple, as with every other Jewish communal organization, wants to find ways to offer support and resources to our members as they move through these difficult economic times. In early December, our temple president, Chuck Friedman, convened a meeting with two dozen members of our temple community who either have experience in job placement, have themselves come through a professional transition, or who bring some other expertise (use of the Internet, public office, etc.) that we felt might engender creative and constructive dialogue.

A number of ideas emerged from this meeting. One that we decided to implement immediately is the use of an online social-networking program called LinkedIn. As explained to us, we could utilize LinkedIn to assist

our congregants in finding their next job.

The basic idea behind using LinkedIn to find new employment is in discovering a way to get through and perhaps ahead of a large group of hopeful applicants by having someone you know introduce you to someone they know, who can introduce you to the right person at that potential place of employment, and who can get you the interview, perhaps even before a job is posted.

Here's how we introduced WCT's LinkedIn Project to the congregation:

During these economically challenging times, your temple is committed to helping everyone face the days ahead. Whether you have lost your job, or are struggling to keep your business and your home secure, or are looking for ways to help others, WCT's LinkedIn Project can help. Here's what the three components of our program can do for you.

LinkedIn Project . . . To Help Those Who Need a Job

LinkedIn offers you an opportunity to engage in online networking that can help lead to possible future employment. We encourage you to join the Woodlands Community Temple group on LinkedIn and begin your own drive toward a newly secured future. Here's how you get LinkedIn:

1. Start your own free account at www.linkedin.com.
2. Complete your personal profile. The more information you provide, the more connections you can make.
3. Join the Woodlands Community Temple group. We regularly post information about job openings

we've learned about, as well as helpful advice for weathering these times. This also opens a door for you with every other WCT member in our group.

4. Send out LinkedIn invitations to friends, past and present colleagues, family members, and neighbors to join your LinkedIn network and help build additional important connections.
5. Join other groups. Whether it's your college or high school alumni group, or a group of fellow swing-dance enthusiasts, more contacts become available to you as you share common life threads with others.
6. Then, as you learn about jobs (either on LinkedIn or elsewhere), you can search for someone on LinkedIn to help get you a foot in the door by personally introducing you to the person you need to get to. What's truly extraordinary about LinkedIn is that, even if you don't know that person, you may very well know someone who knows someone, and so forth. LinkedIn shows you the path of contacts that can get you there. By working the LinkedIn network, thousands of possibilities can open up for you. With the vast power of the Internet, you just may be able to find your way into a new future for yourself and for the people you love.

LinkedIn Project . . . To Help Everyone Weather These Times

If you're finding the need to trim expenses, either at home or at work, we may be able to help there too. In our Woodlands group, members are posting information about ways to save money. And LinkedIn is a great tool to help grow and enhance connections for already-operating businesses. Look for vendors, offer

new positions, and share ideas and concerns with others in your field. LinkedIn can be there for you in good years as well as lean. Please follow steps 1 to 4 above. As your networking circle grows, more resources will become available to you.

LinkedIn Project . . . To Help You Help Others

Acts of kindness are on the increase all across the United States. It would seem that difficult times bring front and center the desire to give a hand. In order for WCT's LinkedIn Project to truly be helpful, we need as many of our temple members to sign on as possible. You may be the all-important link to connect a fellow member to the person who can get them their next job. The wider your circle, the more likely you'll be someone's link to a step up. Please follow steps 1 to 4 above. In these difficult times, it's good to be able to do something to help.

WCT's LinkedIn PROJECT

So, as you can see, the LinkedIn Project is for everyone. Whether times are really tough, mildly tough, or fairly O.K., we hope you will join the project. Get LinkedIn with us, and we'll move into tomorrow together.

And by the way, if you're in any way confused about how to get LinkedIn to work for you, just post your question on our WCT group's Discussions page. Someone will get you an answer that we're certain others will appreciate seeing as well.

From links on the front page of the Temple Israel Center, White Plains, website:

The screenshot shows the Temple Israel Center website. At the top, there are links for 'Contact Us' and 'Calendar', a search bar, and a navigation menu with 'Home', 'About Us', 'Prayer & Religious Life', 'Activities & Events', 'Education', and 'Giving'. The main header features the Temple Israel Center logo and a banner for 'מזל מזרחי Activities and Events'. On the left, a 'Related Links' sidebar lists various programs. The main content area is titled 'Activities and Events // Employment Advisory Initiative' and contains a welcome message, a list of links for participation, and a list of additional community resources.

Related Links

- Overview
- Jewish Art Museum
- Special Events
- Family Programming
- Sisterhood
- Brotherhood
- Youth Programs
- Community Activities
- Volunteering
- Israel Action Committee
- Employment Advisory Initiative
- Legacy Music Series

Activities and Events // Employment Advisory Initiative

Employment Advisory Initiative

**Temple Israel Center's
Employment Advisory Initiative**

Welcome to our Employment Advisory Initiative pages. Our objective is to help those Temple Israel Center members who are looking for employment. During these truly difficult times we should be able to draw on the considerable professional diversity and expertise among us in order to help members of the congregation who are in need of finding employment. It goes without saying that in doing so, we will respect the privacy of TIC members seeking assistance.

Click on the links below for more detail about all the exciting programs and to learn how to participate:

- [List of Current Employment Mentors](#)
(Resume Prep, Networking, Interview Preparation, and other Services Provided by the Committee's Volunteers)
- [Participant Signup Form to Seek Help](#)
- [Volunteer/Mentor Agreement and Form](#)
- [TIC Job Bank](#)
- [Networking and Support Groups](#)
- [Job Posting Form](#)
- [Position Wanted Form](#)
- [Additional Community Resources](#)
- [Internet Job Sites](#)
- [Upcoming Events](#)
- [Feedback, Suggestions, Questions](#)

Continued from page 2

shareholder value than the so-called hard keys. The importance of these issues is magnified in systems that depend on voluntary engagement, including many kinds of nonprofit organizations, and further magnified in religious systems, where congruence between the medium and the message is essential to vitality.

Research from the field of congregational development helps us describe in more detail what helps and hinders successful congregational mergers.

What Helps: A Sense of Urgency

Mergers are more likely to succeed when both (or all) partners have a sustained sense of urgency, an absolute conviction that something fundamental has to change. That urgency can come from a variety of sources:

Internal distress: Congregations come to a point where leaders and members look at their congregation's life history and say, "We simply can't go on like this!" Annual deficits are

mounting and the endowment is shrinking fast. Leaders are exhausted from trying to keep up with business as usual. Numbers have sunk below critical mass for Shabbat services, educational programming, and social events. Sinking energy is a turnoff for new members and talented staff.

Impending transition points: Staff contracts are coming up for renewal. Significant tenants are considering a move. Major property repairs are imminent.

Demographic shifts: The population we used to draw from has moved out of this community. Non-Orthodox affiliation rates have dropped across the whole region. Later marriage and intermarriage have changed the dynamics of affiliation. Synagogue leaders have no strategy to reach adults without school-age children, because it never seemed they had to.

Membership cost-benefit: Dues seem high to prospective members, especially when they add in the special fees, building fund appeals, and miscellaneous fundraisers. Other costs of Jewish life — such as food, camps, and day schools — factor into the total financial burden. Less-engaged members quickly begin to question the value of membership.

Remember that these problems in themselves do not correlate with a successful merger. What does help mergers succeed is a sustained sense of urgency on the part of synagogue leaders to face these problems squarely.

What Hinders: “Yes, but . . .”

As feelings of distress become more acute within the congregation, synagogue leaders face a painful dilemma. Officers and board members often feel they were elected with a tacit mandate to maintain

stability, satisfy the expectations of long-term members, and uphold familiar patterns. So when past approaches no longer effectively work within a changed environment, leaders may find it quite difficult to deliver bad news and propose dramatic changes. Unsuccessful mergers are frequently marked by:

- ♦ Failure to bring in new leadership to embody and implement the congregation’s new identity and purpose.
- ♦ Fear of losing anyone — a timidity about making key changes for the sake of reaching those who are not yet here.
- ♦ Unwillingness to focus energy on matters of strategic importance and let go of programs that have run out of steam.
- ♦ Difficulty navigating issues of tradition and affiliation. When traditional congregations enter into a merger, members who walk to shul are confronted with the prospect of moving their households in order to participate in the merged congregation. Some regional constituents may view cross-denominational mergers as a loss for a particular movement, leaving synagogue leaders vulnerable to criticism by their peers.

Steps in the Process

Synagogue Executive Director Harvey M. Brenner, M.S. Ed., FTA, has documented best practices for the merger process in his thesis, *Merging Congregations*, including:

1. **Explore other options first.** Brenner calls mergers “instruments of change, specifically designed to unsettle the status quo.” Wise congregations first ask themselves if they might better relocate; reshape their mission, culture, or approach; change their leadership; sell their property and rent better space; or close the doors. Weighing

all the options makes a synagogue a better candidate for a merger.

2. **Start with self-assessment.** Before engaging partners in dialogue, take a sober look at the synagogue’s overall health, openness to change, realism about costs, and implications for current leadership.
3. **Create a “merger exploration committee.”** The committee’s purpose is to assess compatibility with potential partners and return a recommendation about whether to start any formal negotiation. When this recommendation is received, each party has the opportunity to check the level of commitment within its own constituency, which is very difficult to assess until there is a specific partnership to discuss.
4. **Negotiate the merger.** While continuity is very important, Brenner suggests that the makeup of each synagogue’s team may shift somewhat as the process moves into serious negotiation. For example, the esteemed elder statesman who gave an important blessing on the process in the exploration stage may not be deeply involved in the intense negotiation of details. Sometimes, the chairs of the two exploration committees may, with legal help, work through many issues. No matter who negotiates, it is helpful for each synagogue’s leadership to begin this stage of work by establishing a list of core values that can guide the negotiators and provide clear criteria for evaluating any emerging agreement.
5. **Prepare and notify the congregation.** Synagogue leaders will need to help their congregation recall the reasons for urgency, enact necessary decisions, and acknowledge the major changes that a merger will inevitably bring.

Continued on next page

6. **Deliberate.** Within each congregation, make sure that all the information is on the table. Engage in open and frank deliberation, with an opportunity for dissenters to voice concerns. Provide written materials to those not present at meetings, and offer the means to contact team members with responses and concerns. After the deliberation, Brenner warns leaders to be prepared for “buyer’s remorse,” and for the departure of some current members who cannot embrace the new reality.
7. **Move forward.** Set a firm date for the merger, and then allow a cooling-off period for people to adjust to the decision and complete transitional tasks. Some congregations have a town meeting in the deliberation stage to approve the memorandum of understanding, then a separate meeting — after some time for reflection — to vote on the actual legal articles.
8. **Implement.** Each congregation should be represented by a competent, independent attorney, and possibly an independent accountant. Create an equally balanced interim board, no larger

than each former board, to serve for two years. Replace members on a two-year, staggered-term basis, maintaining the balance. After six years, elect from the whole congregation.

9. **Celebrate.** A well-planned gala weekend with ritual, social, and historical activities that offer something for everyone provides a positive launch for a new congregation.

While every situation will play out somewhat differently, practices like these can provide leaders with guidelines for establishing a quality process and increasing the odds of success.

Despite the challenges, effective, mission-oriented mergers are possible to achieve and are a worthy option for many synagogues to consider. When leaders are willing to learn, to reflect, and to call on outside resources — books, peer guidance, consultative help — the odds of success improve. We hope this article helps connect synagogue leaders with some of those beneficial outside resources.

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Caring for those in need, rescuing those in harm's way, and renewing and strengthening the Jewish people in New York, in Israel, and around the world.

Synergy newsletters are available online at www.ujafedny.org/synergy.

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