

POLICY NAME:	<b>Beth Israel - Membership Dues</b>
STATUS:	Discussion Draft
DATE of last REVIEW:	Adopted Feb. 12, 2013
NEXT REVIEW:	Annually

## **POLICY STATEMENT**

Beth Israel synagogue's leadership will follow this policy when making decisions relating to membership dues, and when invoicing and collecting membership dues.

## **PURPOSE AND SCOPE**

- Reason: This policy was created out of a need for more clarity regarding how dues amounts are established, and how collection of dues is ensured.
- Intention: The intention of this policy is to provide direction to Beth Israel's leadership when establishing and collecting dues.
- Goals:
  - To ensure a fair and transparent method of calculating membership dues
  - To increase motivation for members to pay dues
  - To increase membership revenue
  - To make membership accessible to all
- Scope: Barring any conflicting laws or Beth Israel by-laws which supersede this policy, this policy applies to all decisions made by the Beth Israel leadership.

## **DEFINITIONS AND CLARIFICATION**

Define:

- *Beth Israel* refers to the incorporated organization, Beth Israel Synagogue.
- *Members* are members in good standing according to Beth Israel's by-laws.

## **MEMBERSHIP DUES SCHEDULE**

A schedule should be prepared that establishes how dues will be calculated for members of the synagogue. Dues shall vary between members based on family size and income to ensure accessibility for all community members. The method by which dues are calculated must be made clear to all members.

The Beth Israel finance committee is responsible for proposing the dues schedule. The schedule must be approved by the Board before taking effect. Approved dues schedules should be reviewed and re-approved each year before invoices are sent.

## **SPECIAL FUNDS**

An additional fee may be added to membership fees for a special fund, such as a Building Maintenance Fund. This fee should be waived for those with a low income level, as determined in the dues schedule.

A Special Fund must be in existence before a Special Fund fee can be charged to members. Where such a fee applies, the Dues Invoice must clearly delineate the parameters of the Fund, including the amount of funds being raised, the purpose of the fund, and the timeline of how long fundraising will be continue. The fund must be accounted for separately from other Beth Israel costs to ensure all fees charged are indeed applied to the fund.

**MEMBERSHIP DUES INVOICES**

Membership Dues Invoices should be sent out near the end of the Gregorian calendar year for membership in the synagogue the following year. (For example, invoices for a 2012 membership will be sent out in November or December of 2011.)

New members will not be invoiced until the usual invoice time. (This may in effect mean that new members could be in receipt of free membership for up to a year.)

**SPECIAL CONSIDERATION**

The membership dues invoice must include instructions for requesting special consideration, and must be state that such requests will be kept strictly confidential by the Finance Committee.

Members or potential members who cannot afford membership dues must have an accessible way to request a waiving of membership fees. Such requests are to considered **ONLY** by members of the Finance Committee. Requests must be kept strictly confidential, even from other members of the Board.

At least three members of the Finance Committee must participate when considering special requests.

**DUES COLLECTION**

The Finance Committee is responsible for tracking dues payments. A list of current members must be made available to the Board. However, amounts paid by each member are confidential, and should only be known to the Finance Committee.

The Finance Committee is responsible to encourage payment by all members, and follow up with those whose membership has lapsed. Volunteers may be engaged in this process.

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AUTHORITY

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SIGNATURE

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DATE