



TEMPLE SHALOM COUNCIL, COMMITTEE & AUXILIARY GUIDE

The purpose of this guide is to provide information to assist you in your volunteer service to Temple Shalom. Included are the answers to the most often asked questions as well as the support that is available from our staff. Suggestions are most welcome.

Revised: June 2019

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GENERAL INFORMATION

Temple main telephone number: (972) 661-1810 (A "names directory" is on the voice mail.)
Fax line: (972) 661-2636

Religious School number: (972) 661-1362
Religious School Fax line: (972) 661-1976

Traditions Judaica Shop: (972) 661-1850

E-mail address: info@templeshalomdallas.org.

Website: www.templeshalomdallas.org

It is advisable to call before coming to meet with a senior staff member or support staff person. They may be at lunch or have an appointment away from the building at the time of your visit.

Additional time for projects or events that involve our Maintenance personnel must be cleared through Steve Lewis.

**IF YOU HAVE ANY DOUBT ABOUT POLICY OR PROCEDURE,
PLEASE CONTACT STEVE LEWIS.**

STAFF

E-mails for Temple personnel: first initial of first name full last name@templeshalomdallas.org

Example: jaddison@templeshalomdallas.org

Phone Extensions:

Rabbi Andrew M. Paley, Senior Rabbi, Ext. 204

Cantor Devorah Avery, Ext. 209

Executive Director Steve Lewis, Ext. 202

Each of our support staff has many responsibilities, some of which are listed below.

Elise Donosky – Ext. 201 – Assistant to Rabbi Paley & Cantor Avery

Rabbi Paley's and Cantor Avery's appointments and correspondence, including B'nei Mitzvah program and appointments, Friday night program, Friday service participants, visiting groups to attend services, yahrzeits, hospital/births/deaths, mi shebeirach list, adult and youth choirs

Joy Addison – Ext. 200 – Membership Secretary

Receptionist, mailings, membership reports, prospective and new member packets, yahrzeit plaques, membership directory, weekly and congregational emails, newsletter

Bella Garber – Ext. 220 or 972-661-1362 – Sunday School/Office Assistant

Rosie Akerman – Ext. 211 or 972-661-1362 – Hebrew Coordinator

rooms@templeshalomdallas.org – Room Reservations and Temple Calendar

Facilities requests for all meetings & events

Kathy Nall - Ext. 219 – Accounting Manager

Accounts payable, petty cash, cash receipts, budget and financial reports, account balances, access to Temple credit card, payroll, check processing, insurance, expense allocation, oversees audit

Karen Thompson – Ext. 226 or 972-661-1362 – Lifelong Learning Office Manager

Communication, registration, and administration for Religious School and Lifelong Learning programs, and High Holy Days Childcare

Heidi Barishman – Website Manager and Accounts Receivable

Accounts receivable, tribute letters, billing and membership statements

Steven Thompson – Ext. 215 – Maintenance Supervisor - facilities@templeshalomdallas.org

Slava Kutman - full time

Wondwosen Zeleke - full time

COUNCIL, COMMITTEE OR AUXILIARY MEETINGS

1. Contact Steve Lewis (Ext. 202 or slewis@templeshalomdallas.org) to reserve a date on the Temple Shalom calendar.
2. Complete a facilities request form and return to Steve. This will ensure that the room requested is booked and ready. Please avoid making any verbal requests for set ups. You may check date availability by going to the calendar on the Temple Shalom website.

The form:

- Asks for diagram of set up.
 - Designates which room in the Temple is to be reserved.
 - Arranges for use of kitchen, paper goods and/or dishes and utensils, and/or other Temple-owned equipment. Tablecloths are charged \$10.00 each for cleaning costs. Please note that we do not supply paper/plastic table covers.
 - Requests coffee/tea/set up, if needed: \$10.00 per 10 people. Water is free.
 - Requests all electronic equipment: projectors, mikes, VCRs, TVs, cables, etc.
 - Requests podiums and lecterns.
3. Anything scheduled during religious school hours (Sundays, 8:30 AM - Noon and Wednesdays 4:20 PM to 8:30 PM) must first be cleared through the Lifelong Learning Office.
 4. Building operating hours are as follows:
 - Monday - Wednesday 7:30 AM - 9:00 PM
 - Thursday 7:30 AM - 6:00 PM (NO ONSITE MEETINGS ON THURSDAY EVENINGS)
 - Friday 7:30 AM - services end
 - Saturday 7:30 AM - last planned simcha ends
 - Sunday 7:30 AM - 4:00 PM (NO ONSITE MEETINGS ON SUNDAY EVENINGS)Please conclude your meetings not later than the scheduled closing time.
 5. Need a security guard? Call Steve at Ext. 202
 - Events open to the community require security. Large member events also require security. Cost \$40/hour, minimum four hours.
 6. Contact the liaison and assigned senior staff person to advise them of the meeting. Notification of meetings should be sent to the president who is an ad hoc member of all Committees. It is not necessary to have both the liaison and the senior staff present at the meeting. Your liaison will advise you.
 7. Please do not schedule meetings at the same time as Temple programs.
 - Please note that meeting rooms are allocated based on availability and the number of people expected. It is possible that the room requested may not be the room that is assigned due to last minute changes.*

Whether your meeting/event is at the Temple or off premises, it must be listed on the calendar. Please contact Steve to let him know the details of any offsite meeting.

Motions or proposals to be brought before the Board of Trustees must first be presented to the Executive Committee. All fundraising events and/or requests to members for funds must be approved by the Board of Trustees. Please call the president to be placed on the agenda.

PLANNING A PROJECT OR EVENT

Clear the date on the Temple Shalom calendar by verifying with Steve that the space and time needed for the program or event is available. Fill out the appropriate facilities/catering paperwork. If the project or event is community oriented, check the community calendar.

Only after the event or program has been cleared on the Temple Shalom calendar, may you place the event or program on the community calendar. Log on to www.jewishdallas.org, the Jewish Federation of Greater Dallas and go to News & Events > Community Calendar > Calendar Submission Information and Criteria. Community events on the calendar are listed into next year. Questions or need to make changes once an event has been submitted? Contact the Jewish Federation of Greater Dallas (214) 615-5200 and ask for the person who manages the community calendar.

Things to Consider:

- “Set-up” paperwork for Temple events/meetings is expected to be completed in a timely manner. Maintenance plans personnel weeks in advance so it is imperative that facilities request forms are filled out as early as possible.
- It is important to have a budget for a program or event. Please contact Kathy in the office for the amount allocated for your budget line. You may request a printout of your budget line which will indicate any income or expense. If the Council does not have a budget line, check with your liaison for direction.
- **All contracts for speakers, entertainers, etc., must be signed by the Temple President.**
- Who on your Committee, Council or Auxiliary will be handling the reservations?
- Request for deposits for speaker, equipment, etc., need to be handed to Kathy with the supporting paperwork.
- What are the hours of the event? Are reservations required? Who will be taking reservations?
- Will the kitchen be used? Will our china dishes and utensils or paper goods be used? If Temple paper goods will be used, they may need to be ordered by our Maintenance Staff. Please note that we do not supply plastic/paper table covers.
- Events or programs open to the community require a security guard. Contact Steve.
- If liquor is being served, a security guard is required both inside and outside. A licensed bartender is required if anything other than beer or wine is being served.
- Is childcare required? You must arrange this on your own. We do not use our teens for this purpose.
- A cash box is available for use at an event. Contact Steve or Joy.
- Credit card fees are not usually accepted for events. Check with Steve for exceptions. Credit card fees are charged to the event.
- Give Steve any checks/credit card receipts/cash in a timely manner. Please include a sheet tallying the amount given.
- If the event involves additional time for our maintenance staff, that time, and any overtime if required, will be charged to the event.

PURCHASES AND REIMBURSEMENTS

A tax-exempt form is necessary for Temple purchases.

Temple Shalom does not pay taxes on purchases. Reimbursements for purchases will not include a reimbursement for tax paid if the tax-exempt form is not used.

The tax exempt number is: 75-1231572. Ask Joy for a copy of our tax-exempt form.

Suggestion: Keep a copy in your wallet, another in your glove compartment.

It is always appropriate to state that you are purchasing for a non-profit and request a reduced price.

The Temple has a credit card that you should use when applicable. Please contact Kathy Nall for the credit card number. An expense voucher form must be filled out so that the credit card statement can be reconciled each month. Use of the credit card for renting buses; deposits for events, ordering food delivered for a meeting or program are a few examples.

For large purchases from Sam's Club or Costco, you must ask a designated staff member to shop for the Council as only some Temple Shalom staff have a card at Sam's or Costco. Remember that if you use your own card, there is no tax on food. If you purchase taxable items, taxes cannot be reimbursed.

If a C.O.D. is required, please advise Kathy in advance so the check (if credit card cannot be used) will be ready. This includes food items, such as pizzas for events or meetings. Otherwise, please pay personally for these items and submit for reimbursement as explained above.

Receipts are required for reimbursement. Clearly indicate what the reimbursement is for so the correct budget line may be posted. For reimbursement, fill out an expense voucher. Copies are in the office. Reimbursement checks take a minimum of two weeks to process. Call Kathy if you have any questions.

All checks require the signature of an officer. Checks in the amount of \$1,500 or more require the signature of two officers. Please allow time for this process.

COMMUNICATION

Monthly Newsletter

Joy coordinates the articles for the Newsletter. The information should be attached to an email and sent to Joy. There is a uniform format for the Newsletter and, therefore, articles submitted in a particular format may not appear as submitted; space and uniformity govern. Information should be submitted in Word with pictures as JPEGs. PDFs should not be used as they cannot be manipulated.

The newsletter is published every month, although we have two combined issues, June/July and December/January. **Deadline to submit information is the 15th of the month before the issue in which the information appears.** Articles arriving after the above stated dates are not guaranteed inclusion. Before any information is submitted to Joy, the event **MUST** be submitted to Steve for the calendar, even if the event is offsite. A link to the newsletter is sent to every Temple member for whom we have an email address. We can accommodate requests from people who need a hard copy.

Friday Service Handout

A Friday handout is distributed at Friday services listing yahrzeits, mi shebeirach list, service participants and activities for the coming week. Elise prepares this handout and takes information for inclusion out of the newsletter and the weekly email reminder.

E-mail

Our database has email addresses for every member who has provided one. Each week, we send a weekly reminder on Monday which is then posted in the Calendar section of the website. Joy writes and edits the weekly reminders. Councils and Auxiliaries are asked to submit their information no later than the preceding Thursday at noon. To advertise an event, please submit a short description with the website address where more information can be found.

Website

Our website is www.templeshalomdallas.org. The Temple Shalom 'webmaster' is Heidi Barishman. Councils are expected to post their own information on their web page(s). It is important that the information on the website be timely. If you need help editing or creating a page or website credentials, contact Heidi. Please designate a web person from your Council or Auxiliary who will be responsible for updating your page(s) regularly. All of the current councils and committees have email addresses which are used on the website and are forwarded to the chairpeople. If you need the Temple member password to login to the protected sections of the website, contact Joy.

Facebook

Before creating a Facebook page/group for your committee or auxiliary, you must receive permission from Steve Lewis. He must be given the names of the administrators, their user names and passwords. Each group should adopt a policy where people must ask to join your group. You should have two administrators with permission to handle any requests to join. Before accepting any new request, vet the page of the individual looking to join. Some tell-tale signs of fake FB accounts are recently changed/updated profile pictures. (or if the profile picture has changed multiple times in the past few weeks) Also, any page that doesn't seem more than 3 - 4 years old is suspicious. And always look at the friends list of the person requesting entry into the group. Are they friends with anyone at the Temple? Do they look like they are local people or are their friends mostly from another country? Red flag if they only have international friends. If you aren't quite sure, send them a note via messenger (before accepting request to group) and ask them how they heard about your group. Ask them who else they know at the temple. If they can't answer or answer in broken English, reject the request.

Marketing Assistance

We have the services of a part-time marketing professional, Lisa Rothberg. If you would like information about utilizing this service, please contact Steve Lewis.

FLYERS AND COPYING

Don't forget! Flyers need to contain the important "W's".

Who? What? When? Where? Why?

Include graphics to make a flyer interesting! Be sure the graphics are clear when the flyers are copied in black and white.

Committees and Auxiliaries are responsible for preparing, copying, and folding their own flyers. You are welcome to use the Temple copiers, but rates at area copy places may be better than what we can offer. Be sure to take your tax-exempt form with you so that you are not charged tax for the copies.

Rates are as follows:

- White paper \$.05 per side
- Colored paper \$.07 per side
- Color printing: \$.15 per side

If you would like to copy a flyer at Temple, please call Joy to be sure that staff is not using the copier for a large project. Please allow ample time for your group to do the project.

If the flyer is to be distributed through the Religious School, it must be approved by Karen Thompson. You are responsible for separating the copies into class bundles. Contact Karen for the number of classes and the number of flyers per class bundle.

Reminder: If you are mailing a flyer without an envelope, please do not use dark colored paper or red, dark purple or orange paper because the meter's red postage mark will not be visible.

PLEASE DO NOT TACK, STAPLE OR TAPE ANY FLYERS ON ANY OF THE DOORS OR WALLS.
Please do not put flyers in the carousel. Give all information to Joy.

BANNERS

Banners may be displayed for a period of approximately 30 days. They are ordered in 4ft x 2.5ft VERTICAL format from the vendor link shown below. Committees are responsible for putting up the banners—ask Joy for assistance.

http://www.vistaprint.com/custom-banners.aspx?txi=154&xnid=TopNav_Banners_Signage_Business&xnav=TopItem

**ALL CONGREGATIONAL MAILINGS, INVITATIONS, FLYERS AND BANNERS
MUST BE REVIEWED BY STEVE LEWIS FOR CONTENT.
PLEASE DO NOT ORDER/PRINT PRIOR TO RECEIVING HIS APPROVAL!**

MAILINGS & CONGREGATIONAL EMAILS

Envelopes/Labels/Mailings, Mailing Guidelines & Congregational Emails

- Joy handles mailings prepared from specific databases, i.e., members in a specific age range, college youth, etc. Please give a minimum of one week for creation of a database. With the software we have, it is possible to create a database for large groups, i.e., Sisterhood, Brotherhood, Tikkun Olam, etc. It is up to the Council or Auxiliary to provide the information required to Joy so that the group can be created. This aids in targeting a specific group for a mailing.
- Contact Joy and tell her you want to do a mailing: specify target audience (i.e., all Sisterhood members or entire congregation, etc.) and date for which labels and envelopes are required (a minimum of 1 week is recommended for labels and 2 weeks if envelopes must be ordered from our printer). You are charged for envelopes and labels (and copies and paper if you do it at Temple) as well as for the mailing.
- Envelopes and postcards in dark colors or red, orange or purple cannot be used as our red postage mark from the meter must be visible.
- Use matte, not glossy paper, so that the postage mark will adhere and not smudge.
- Envelopes with straight edged flaps that are flush with the envelope cannot be sealed in our postage meter. Please check with Joy if you are planning, and before purchasing, envelopes other than our standard mailing envelopes. You may use glue sticks or sponges instead to seal envelopes.
- Joy will advise you when you can pick up the labels, envelopes and Post Office mail trays at the Temple office. Envelopes may need to be ordered from the printer, so consider that in timing your mailing.
- We can send congregational Constant Contact emails for specific events. Contact Joy and send her information at least one week before you need the email sent to the congregation. We do not send event emails on Mondays or Friday afternoon and we try to send only one congregational email per day. Depending on the event, we generally will send one congregational email in addition to advertising the event in the weekly enews and in the monthly newsletter.

Bulk Mail Procedures

- Minimum of 200 pieces and at least 150 pieces must be in 750/752. If there are fewer than 150 pieces in those zip codes, then those will count as 75197 mail and are more expensive to send—still bulk mail rate, but a few cents more per piece.
- Size Requirements to stay letter size: Height 3 ½ to 6 1/8 inches. Width 5 to 11 ½ inches. Weight up to / not over 4 ounces. Thickness ¼ inch maximum. Larger items will be an additional cost.
- Envelopes and postcards in dark colors or red, orange or purple cannot be used as the postage mark from the bulk mail meter must be visible.
- The Bulk mail indicia must be printed where the stamp would normally be affixed.

- Ancillary service endorsements such as “Address Service Requested” must be printed below the return address label. Contact Joy for the exact wording and placement. Bulk mail will not be accepted without this endorsement, and any pieces returned will be charged back to the group doing the mailing. Only use “Temple Shalom” as the return address name (not adding Sisterhood/Brotherhood, etc.,) because the bulk mail permit is in that name. If you use any other, the mailing will not be able to be sent as bulk mail.
- Envelopes with straight edged flaps that are flush with the envelope cannot be sealed in our postage meter. Please check with Joy if you are planning, and before purchasing, envelopes other than our standard mailing envelopes. You may use glue sticks or sponges instead to seal envelopes.
- All pieces in the mailing must be identical, so PLEASE DO NOT write handwritten notes on any envelope or part of the mailing.
- Assume the maximum 14-business day delivery period.
- Ask Joy for trays, sleeves, labels printed for bulk mail, bulk mail envelopes and strapping tape.
- **Bulk mail labels must be kept in zip code order.** If zip code order is not maintained, you will have to put the mailing in order before you take to the post office bulk mail facility. Zip code order means keeping all the zip codes with 750 separate from those that begin with 752. Any zip codes that don’t start with either of those prefixes must be in a small, separate tray or a separate bag with a 75197 label. There is no need to keep the zip codes in order past the prefixes.
- A postal report must accompany the mailing to the Richardson bulk mail facility at Arapaho and Hwy. 75. You can obtain this from Joy. In order for her to prepare the report, you must bring a completed mailing piece (including envelope) to her prior to the stuffing.
- Group envelopes according to postal procedures and take to the Richardson Post Office Bulk Mail Facility—in the back of the Richardson Post Office on Arapaho at Hwy 75. The bulk mail office hours are 8:30am - 3:00pm and the facility is closed 12:30pm - 1:30pm for lunch. The Bulk Mail Post Office clerk will give you a report which must be returned to Joy. Keep a copy for yourself for your project records. Hours may change, so call before you go. Plan to stay at the post office until the mailing is accepted—it could take five minutes or a few hours.
- Please note that postal regulations change frequently! You may have to pay extra postage because we don’t have a machine that puts bar codes on certain packages such as irregular parcels.

For other questions, call the post office or take a piece of the mailing to the bulk mail facility to check. Cost is determined by size, weight, and thickness. You can also find information at www.usps.gov.

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PLEASE DO NOT ORDER/PRINT PRIOR TO RECEIVING HIS APPROVAL!