

TEMPLE SHALOM POLICIES

(Updated as of May 6, 2024)

I. FINANCIAL POLICIES

Pledges are commitments to specific areas and may be necessary requirements of Temple Shalom's banks, and, as such, are not to be forgiven by reasons of marriage, divorce, or death, except as specifically directed in this policy or by direction of the Executive Committee. Dues are annual commitments and, as such, are more flexible.

A. DUES

1. Dues are annual; they may be billed monthly or quarterly for the convenience of the Temple member.
2. Dues for each membership category are set each year through the budgetary process.
3. Less than standard dues are available in any of the membership categories upon a confidential review of the member's financial situation by the Temple Treasurer (or his designate) and approval by the Treasurer.
4. Dues reductions
 - a. If a member moves out of the Dallas-Ft. Worth Metroplex, there will be a reduction in dues according to the following schedule, based upon when the actual move takes place:
 - i. Between June 1 and the High Holy Days (if the Temple office is notified in writing in advance): High Holiday tickets, if already issued, will be returned and dues will be reduced by 75%.
 - ii. Beginning thirty (30) days after the conclusion of the High Holy Days, dues shall be pro-rated for the remaining portion of the fiscal year.
 - b. If a member leaves the Temple for any other reason, there will be no reduction of dues.
 - c. Changes in marital status during the fiscal year:
 - i. Divorce: Both parties remain as members for the balance of the year. Dues obligation is joint and several.
 - ii. Marriage of two members: Dues obligation shall be the standard dues of the married category to which they now belong. Prior payments made by each spouse shall be credited to their new obligation; if the combined paid to-date total exceeds the new obligation, there shall be no refund.
 - iii. Marriage of a member to a non-member: if married prior to the High Holy Days, the Dues obligation shall be the standard dues of the married category to which they now belong. Prior payments made by the member shall be credited to their new obligation. If married after the High Holy Days, there shall be no change in the dues obligation.
 - d. Death of a member or spouse does not relieve the dues obligation or alter the membership category for that fiscal year. Exceptions may be considered by the Executive Committee on an individual basis, and appropriate changes made.

B. PLEDGES TO FUNDS

1. There is to be no forgiveness of a pledge obligation to a fundraiser.
2. Building Fund
 - a. The amount of the building fund obligation shall be set by the Board of Trustees.
 - b. The Building Fund commitment shall be outlined to all new members.
 - c. Although the total Building Fund obligation is due upon acceptance of Temple membership, its payment must be completed within 6 years. Other terms may be arranged with the Executive Director.
 - d. If a member leaves the Temple for any reason, the balance due towards the Building Fund obligation is immediately due and payable, unless arrangements are made with the Executive Committee.
 - e. Temple Shalom will apply a credit to the building fund commitment in an amount to what the member paid to any Jewish congregation during the previous three years.
3. Special Marital Considerations to Building Fund
 - a. Divorce-no outstanding obligation: Both parties receive full credit and will have no further obligation, even if both remarry.
 - b. Divorce-balance outstanding: Both parties are responsible for the outstanding balances.

C. POLICY ON BAR/BAT MITZVAH FEES

1. The Bar/Bat Mitzvah Fee shall be set annually through the Temple budgetary process. A one third deposit is required to secure a date. Fees must be paid in full prior to the event.
2. If a family moves out of town prior to onset of tutoring, there shall be a one hundred percent (100%) refund of monies already paid.
3. There will be no refund to anyone moving to another congregation in a one hundred mile radius.
4. Member setting date must be in good standing both at time date is set and at time of final payment.

D. CONFIRMATION FEES

1. The Confirmation Fee shall be set annually though the Temple budgetary process. All fees must be paid in full prior to the event.

E. DESIGNATED FUNDS

Designated Funds established by Temple Shalom are used for a specified purpose or program. For some of the designated funds, revenue and/or expenditures are included in the operating budget. For other designated funds, the expenditures are not included in the operating budget. This policy explains how to authorize and account for the revenue and expenditures for these designated funds.

Designated Funds are restricted and must be used to support the corresponding activities. The Board of Trustees may authorize transfers from these funds for special purposes, as long as they are consistent with the underlying purpose of the Designated Fund.

At the beginning of each fiscal year, the respective committee or staff will submit a plan to the Board for approval describing the expected use of the funds during the year. For designated funds, included in the operating budget, the Board of Trustees must approve expenditures in excess of the budgeted amount. For other designated funds, the Board of Trustees must approve all expenditures.

Treatment of surplus or deficits for only those Designated Funds included in the operating budget is as follows: If the actual revenue is greater than the expenditures, the excess will be transferred to the Designated Fund and reserved for future use. Contributions made to social action, and caring congregation committees may be carried over to the next fiscal year if not used in the fiscal year received. Notwithstanding the foregoing, expenditures from each of these committees up to the annual budgeted amount(s) shall be first made from contributions to those funds. If the fund is depleted during the fiscal year through such expenditures, then any additional amounts spent shall come from the Temple's operating budget.

Contributions made to the Adult Education Fund may be used by the committee for Adult Education purposes in addition to the funds allocated for Adult Education in the annual Temple budget, with the approval of the Board of Trustees. Net proceeds that are accrued in the Adult Education budget line will be transferred to the Adult Education Designated Fund for use in future fiscal years.

F. PRESCHOOL FEES

A member, having a child in the preschool, may not pay less membership dues than the difference between the member rate and non-member rate for their particular program.

II. POLICIES ON GOVERNANCE

A. POLICIES ON NON JEWISH SPOUSES

1. Sisterhood and Brotherhood have their own specific policies.
2. The non-Jewish spouse may, and is encouraged to serve on committees, belong to auxiliaries and participate in Temple activities, but may not serve as a chairperson, a member of the Board of Trustees, or Temple officer.
3. While participating in a life cycle event, the non-Jewish parent shall not perform those acts during the ceremony that are or could be considered strictly Jewish. For example, the non-Jewish parent should not carry the Torah, say blessings, be given an aliyah, or perform any other act during which specific Jewish affirmations are expressed.

Notwithstanding the foregoing, the non-Jewish parent is encouraged to play a parental as opposed to a strictly Jewish role in the ceremony by being the parent who speaks to the Bar/Bat Mitzvah on behalf of the family or in any other manner that is not considered strictly Jewish.

4. Finally, in the event that this policy does not address a particular situation, the Rabbis shall have the discretion to make decisions on the involvement of the non-Jewish parent in the life cycle event.

B. POLICY ON NON MEMBER ACTIVITIES

1. High Holy Day policy is written separately.
2. B'nai Mitzvah candidates must be a member or child of member. Legal guardians of B'nai Mitzvah students must be Temple members, although exceptions on rare occasions may be granted by the Executive Committee.
3. Activities taking place at Temple Shalom shall be designated as a Temple or communal activity. Temple Shalom reserves the right to limit participation in certain activities to members.

C. POLICY/CRITERIA FOR SERVICE ON THE BOARD OF TRUSTEES

In order to serve as an officer, or on the Board of Trustees, it is a requirement that the person be a member of Temple Shalom in good standing and of the Jewish faith. There are four (4) categories that must be considered by the nominating committee when evaluating a member for service on the Board. They are values, membership, leadership/creativity and service.

1. Values
 - a. The member must be Jewish.
 - b. The member must have an understanding of Reform Jewish values.
 - c. The member must have an understanding of the meaning, purpose and function of the temple and its role in our community.
 - d. The member must be willing to attend Shabbat services on a regular basis.
2. Membership
 - a. The person must be in good standing - regardless of dues category, a board member is expected to honor financial obligations to the Temple.
3. Leadership/Creativity
 - a. The person must have demonstrated leadership ability in tasks already performed: for example, in projects, committees, other Jewish or civic non-profit organizations, or in auxiliary organizations.
4. Service
 - a. The person must have participated in meaningful committee work and fulfilled all duties and responsibilities.
 - b. The person should have made a contribution to the congregation's efforts in one or more of the following: education, membership, public relations and/or finance.
 - c. The person must be willing to chair or serve on a Temple committee.
 - d. There must be a commitment to support Temple activities, including those of its auxiliary organizations, especially fundraisers, major projects and events.
 - e. The person must have the ability to spend sufficient time during the years of expected service.
 - f. The person must display a willingness to attend board meetings and be an active listener/participant in discussions and debates.
 - g. Membership in Sisterhood or Brotherhood is mandatory.
 - h. The person must adhere to a Conflict of Interest Policy that may from time to time be updated by the board.

D. POLICY ON COMMITTEE MEMBERSHIP

Membership in committees is open to all Temple Members. (Any Temple member may serve on a committee.)

E. POLICY ON AUXILIARY ORGANIZATIONS

1. Auxiliary Organizations: Sisterhood, Brotherhood, Parent Teacher Organization, and SHFTY are auxiliary organizations that maintain their own constitutions and by-laws. These constitutions must be in compliance with those of Temple Shalom and discrepancies shall be resolved by the Executive Committee. All officers and board members of Brotherhood and Sisterhood must be members in good standing of Temple Shalom. Parent Teacher Organization officers, who are members of Temple Shalom, must be in good standing.
2. Programming shall be the concern of the individual organization. All fundraising shall be approved in accordance with Temple policy.
3. Sisterhood and Brotherhood may have their own membership policy.
4. The president of the Sisterhood or Brotherhood may not simultaneously serve as an officer of the Congregation.

F. MEMBERSHIP POLICIES

1. Honorary/Courtesy Memberships
 - a. Upon request, children of members shall be granted a one year honorary membership at age 26 or for their first year of marriage, whichever comes first. Honorary memberships shall not be granted past twenty-nine (29) years of age. These memberships include voice and vote.
 - b. Courtesy memberships are to be given to the Rabbis, Cantor, Director of Life Long Learning, Director of Early Childhood Education, Temple Executive Director, and Youth Director. In addition, a courtesy membership shall be given to Bella Garber. These memberships, including all family members, come with voice, but not vote.
2. Associate Membership
 - a. An Associate Member must be a member in good standing of another Jewish congregation and maintain such good standing during the term of Associate Membership at Temple Shalom. The then-current membership fee for this category must be paid in full at the time of membership and annually upon renewal. The rights and restrictions of an Associate Membership include:
 - i) Receiving all communications and correspondence such as newsletters, e-mails, invitations, etc.
 - ii) Serving on a volunteer committee, but not serving as a committee chairperson.
 - iii) Belonging to an auxiliary group (i.e., Sisterhood, Brotherhood, and Parent Teachers Organization).
 - iv) Purchasing memorial plaques and other honoraria in the Temple.
 - v) Obtaining High Holy Day Tickets as follows:
 1. An Associate Member residing within a 100 mile radius of Dallas may purchase High Holy Day tickets at the then-current fee for out-of-town unaffiliated relatives of regular Members at a rate determined by the Temple Shalom Budget Committee. Tickets are non-transferable and are available only to the Associate Member and their single children aged 26 or under.
 2. An Associate Member residing out of a 100 mile radius of Dallas may request non-transferable complimentary tickets for all High Holy Day

services. Tickets are available only to the Associate Member and their single children aged 26 or under.

- vi) May not vote at Temple annual meeting or other occasions where a congregational vote or referendum takes place.
- vii) Children or grandchildren may not attend religious school.
- viii) Children or grandchildren may join youth groups but cannot receive a camp or youth scholarship or hold an elected office.
- ix) Not eligible for pre-school tuition discount.
- x) Not eligible for facility usage discount (non-member fee schedule applies).
- xi) Not eligible to purchase Temple Shalom burial plots.

G. HIGH HOLY DAYS POLICY

1. All Temple Shalom members who are in good standing are entitled to High Holy Day tickets at no charge.
2. Children of members whose age is less than twenty-six (26) as of June 1 are included in their parents' membership and will receive High Holy Day tickets upon request. College students (of members or non-members) may show current college identification for admission to services.
3. Out-of-town visitors (defined as living further than one hundred (100) miles from Dallas) and who belong to another congregation may present a courtesy request form from their congregation (Reform or non-Reform) for reciprocal free High Holy Day tickets.
4. Out-of-town family or visitors who do not belong to another congregation or who do not secure the courtesy request form will be able to purchase High Holy Day tickets on an as available basis at a rate determined by the Temple Shalom budget committee.
5. Those who do not conform to the above descriptions may be seated in our Library on an as available basis.
6. An additional ticket will be provided to our members who have become widowed for the first year and it may be left to the discretion of the Rabbi after the first year.
7. Tickets or guest passes are required for all High Holy Day services.
8. Congregants who misplace or leave their tickets at home will receive a pass from the Temple Administrative office at or shortly before the time of services which will gain them entry to the next service only. If passes are needed for later services or Holy Days, the member will need to return to the Temple at the time of the services for these passes.
9. Seating in the Epstein Chapel and in the Main Sanctuary shall be limited to members of the congregation during High Holy Day Services. Others shall be seated in the Library or other designated area on an as available basis.

H. RELIGIOUS SCHOOL REGISTRATION POLICY

1. It is the policy of Temple Shalom to provide high quality Jewish educational opportunities for children of members in good standing and to achieve this goal in a fiscally responsible manner. Our budget for the religious school requires all members to be in good standing and current on all financial obligations to the Temple at the time each religious school semester begins.

2. To accomplish this policy of high quality education and to insure enrollment of a members' child in each semester of religious school classes, Temple Shalom has the following requirements:
 - a. Religious School entrance paperwork must be completed and returned to the Temple Shalom School Office before the start of each religious school year.
 - b. All financial commitments to Temple Shalom (dues, religious school fees, building fund pledges, and any other miscellaneous charges) must be brought current before the start of each semester including payment of special arrangements which have been made and approved by the Treasurer.

Students will be assigned to a class only upon the completion of these requirements.

III. PERSONNEL POLICIES

A. POLICY ON WORK FOR DUES CREDIT

1. Members who work for full or partial membership dues credit must meet all qualifications for the job they are performing, must meet the same performance standards as paid personnel, and shall be subject to the same fees and assessments as other Temple members.
2. There shall be no job creation to satisfy the needs or the abilities of any individual.
3. This program shall be available and predominately applied to religious school teachers.
4. Volunteerism shall be separated from this program.

B. POLICY ON SENIOR STAFF

1. Senior staff is defined as Clergy, Executive Director, Director of Life Long Learning, Director of Religious Education, and Director of Early Childhood Education
2. Outside Employment
 - a. Senior staff must first obtain permission of the Executive Committee before accepting another professional engagement.
 - b. The Executive Committee must annually approve all professional engagements of temple professional staff.
3. Fees
 - a. Dues
Senior staff members receive courtesy memberships. There shall be no charge for Temple dues. See section II(F)(1).
 - b. Religious School/Hebrew School/Confirmation Class
There shall be no charge for Religious School tuition, Hebrew school tuition, or Confirmation class tuition. Temple Shalom absorbs all costs for books and materials.
 - c. Bar/Bat Mitzvah
There shall be no charge for children of our senior staff, except for direct expenses such as tutoring.
 - d. Confirmation
The Staff member shall pay the full cost of Confirmation fees. This fee equals our out-of-pocket expenses (robe rental, retreat at Greene Family Camp, bus transportation, picture, party, confirmation reception and gift).
 - e. Early Childhood Education (all full time Temple staff)
There is a 25% discount on tuition for children in our Early Childhood Education program. There is no discount on registration fees.

f. Youth Groups

The staff member shall pay full dues for youth groups.

g. Program Activity Fees

The staff member shall pay all costs of youth events, activities, conclaves, kallahs, etc., which are direct out-of-pocket expenses.

h. Staff Meal Policy

Senior and professional staff members and their spouses/life partners shall be guests of the congregation at meal events held on Temple Shalom property.

C. POLICY ON MARRIAGE CEREMONIES

1. Clergy may only officiate at marriages of Temple members and at marriages of children of Temple members, except they may officiate for personal family members and close friends at their discretion.

2. When officiated by Temple Shalom clergy, only Jewish religious symbols shall be present at marriage ceremonies or any related events at Temple Shalom. All rituals, such as readings, commentary and music at the wedding shall be consistent with Jewish tradition and approved by our clergy, and at Temple Shalom clergy's discretion, may be co-officiated by other Jewish clergy only. The Executive Director and Rabbi shall have the discretion to permit others to utilize Temple facilities consistent with rental policies and perform life cycle events at Temple Shalom that may vary from these rules. *(Approved 5/6/2024)*

D. TEMPLE SHALOM CLERGY DISCRETIONARY FUNDS

1. Intent – This document describes the Temple Shalom Clergy Discretionary Funds (the “Discretionary Fund”) policy.

2. Purpose – Temple Shalom shall maintain a Discretionary Fund for each of Temple Shalom's clergy to receive and distribute donations directed to that fund. The purpose of the Discretionary Funds is to allow Temple Shalom's clergy to support needy congregants and other individuals, as well as non-profit, charitable organizations (as defined by §501(c)3 of the U.S. tax code), including Temple Shalom. The purpose of this policy is to provide guidelines for the appropriate and inappropriate uses of these Discretionary Funds.

3. Prohibited Uses –

a. The Discretionary Funds may not be used for personal benefit to the clergy of Temple Shalom or their families.

b. Even though the Discretionary Funds can be used for many worthy purposes, the Discretionary Funds may not be used as a mere donor conditioned “pass through.” If a donor wants to support a particular Temple Shalom program, then the contribution must be made directly to Temple Shalom through a donation to the operating budget or a designated fund, rather than to the Discretionary Funds.

c. Donations, disbursements or transactions from the Discretionary Funds to charitable organizations shall only be made to those with §501(c)3 designations.

d. Donations, disbursements or transactions from the Discretionary Funds shall only be made in the name of Temple Shalom.

e. The Discretionary Funds may not be used to obligate the Discretionary Funds or Temple Shalom for future commitments to any organization.

4. Confidentiality – Because disbursements from the Discretionary Funds may deal with the personal and private lives of those in need, confidentiality of those recipients is imperative. People need to know that their privacy will be protected when they approach Temple Shalom's clergy to discuss their personal needs. Therefore, the names of those benefiting from Discretionary Fund distributions shall be kept confidential other than as necessary to maintain the integrity of these Funds and these policies.

5. Control – Consistent with these policies, Temple Shalom Clergy Discretionary Fund distributions are under the sole control of the Temple Shalom Clergy.

6. Ownership – The Discretionary Funds are owned by, and are a fund of, Temple Shalom.

7. Donations –

a. All checks deposited to the Discretionary Funds shall be made out to the specific Discretionary Fund and/or Temple Shalom and not made out to the clergy, personally, to comply with IRS regulations on deductions for charitable contributions.

b. Individual donations to the Discretionary Funds may not be designated or restricted by the donor for a specific cause, person or expenditure.

8. Review – The Discretionary Funds shall be reviewed, annually, by an individual, qualified in accounting and/or tax law, who shall be jointly appointed by the clergy and the Temple President. The intent of this review is to ensure that the Discretionary Funds are being used in accordance with prevailing tax laws and this policy.

9. Final Disposition – Upon a member of Temple Shalom's clergy leaving Temple Shalom's employment for any reason, all money in the Discretionary Funds shall remain the sole property of Temple Shalom and may be designated by the Board of Trustees to be used for the funding of other, or additional, Discretionary Funds.* Any and all tangible items purchased for the clergy's use through the Discretionary Fund (such as, but not limited to, books, art work, computers /software) shall be, and shall remain, the property of Temple Shalom. * All Emeritus clergy may maintain a discretionary fund consistent with these policies.

References

1. Suggested Guidelines for Rabbis Discretionary Funds, Rabbi Richard Hirsch, Executive director, RRA, January 2008. www.reconplacment.org/rdfguidelines-feb2008.pdf.

2. Guidelines for Rabbis Discretionary Funds, CCAR. www.ccarnet.org/rabbis-communities/professional-resources/discretionary-fund-guidelines.

E. POLICY ON PARSONAGE

Clergy parsonage is to be approved at the May Board of Trustees meeting.

F. RABBI EMERITUS POLICIES

Emotional ties between rabbi and congregation strengthen with time, and continue beyond the date on which a rabbi retires. Still, each congregation requires a single rabbi who is given both the authority and the responsibility of guiding it.

1. The rabbi emeritus should help the senior rabbi in the position to which he/she has been elected, and should guide lay people to understand that when a new rabbi is elected, such responsibility is transferred automatically and fully. The rabbi emeritus also should guide lay people to accept the new rabbi as the successor and to show him/her all courtesy. The rabbi emeritus should refuse to be drawn into questions of congregational policy or into newly established relationships between the new rabbi and his/her congregants individually or collectively.
2. The senior rabbi and the rabbi emeritus have an obligation to accord each other honor and courtesy, and to maintain an adequate reciprocal flow of information and communication, thus maintaining the spirit of *kovod harav* (honor due the rabbi). The senior rabbi should respect the experience and work of the predecessor.
3. The rabbi emeritus may sit on the pulpit at any service and at a place of honor at all significant occasions in the life of the congregation and should be so welcomed. The wishes of the emeritus to do otherwise should be respected.
4. When invited to do so by the rabbi of a congregation, the rabbi emeritus may participate in conducting the synagogue service or may preach. When performing these functions, the rabbi emeritus should follow the forms of worship and ritual then prevailing, unless there is agreement otherwise.
5. The rabbi emeritus may officiate at lifecycle ceremonies with the agreement of the successor. In such situations, the rabbi emeritus should follow the policies set by the successor, unless they agree otherwise.
6. A rabbi emeritus (or a rabbi living in another rabbi's community or maintaining membership in his/her congregation) ought not to engage in activities which interfere with the senior rabbi's leadership of or relationship with, the congregation or community.
7. The senior rabbi has a responsibility to see to the well-being of the rabbi emeritus and his/her spouse. This responsibility extends to a surviving spouse.
8. The assistant/associate rabbi should respect the historic ties of the rabbi emeritus to the congregation and rabbis emeritus should welcome their younger colleagues, sustaining them in the rabbinate and nurturing them in their work. Mutual consideration and support will enhance both positions.
9. Variations of all of the above may be made by mutual agreement of the rabbi and rabbi emeritus.

G. MISCELLANEOUS PERSONNEL POLICIES

1. Temple Shalom will create a Section 125 Cafeteria Plan providing tax benefits and other benefits as determined by the board of trustees for our full time employees.
2. A criminal background check will be done on all employees. In addition, those volunteers who interact on an ongoing basis, with students in our religious school, preschool, youth groups, and for the Camp Hooray program will be required to have a criminal background check.
3. Conflict of Interest: Employees are required to adhere to a conflict of interest policy that may from time to time be updated by the Board of Trustees.

IV. MISCELLANEOUS POLICIES

A. POLICY ON HAVUROT

All members of Havurot must be members in good standing of Temple Shalom.

B. POLICIES ON FUNDRAISING

1. All fundraising and/or solicitation of monies or goods for the purposes of the Temple Shalom congregation will be reviewed by the Fundraising Committee in conjunction with the Executive Committee and approved by the Board of Trustees.

2. When raising funds through the selling of greetings, tributes and/or advertisements for the purpose of compiling a Tribute Book or Ad Directory, all Temple Shalom auxiliaries, i.e., Sisterhood, Brotherhood, Preschool, Youth Groups, etc., personal greetings or tributes may be accepted and commercial or professional ads may be purchased.

3. GRANTS

Grants may be applied for with the president's approval with the provision the grant request does not incur major expenses.

C. POLICY ON PAST PRESIDENTS

A Past President's council shall meet at least once annually.

D. DIETARY POLICY

1. Shellfish and pork products are not permitted on Temple Shalom property at any time. In addition, meat and milk products shall not be used simultaneously in the same serving dishes at Temple events. Bread and related leavened products are not permitted at Temple Shalom during Passover.

2. All catered meals and refreshments served on Temple property must be approved by the Executive Director. Information about additional restrictions placed on both catered and non-catered meals can be obtained from the Executive Director.

E. DIRECTORY POLICY

Directory information is for the personal use of Temple Shalom members only. Temple Shalom policy specifically prohibits the use of our members' personal information for any advertising or commercial purpose. (Language amended and approved by Board 03/05/2023)

F. POLICY ON MEMORIAL PLAQUES

A separate fund shall be established from funds contributed for Memorial Plaques to be used for the benefit of the Temple, to be approved by the Clergy, Executive Committee and Board of Trustees. Money should be reserved for purchase of future memorial tablets.

G. BEQUEST POLICY

Any proceeds or distributions received from any bequest made for the use and benefit of Temple Shalom shall be deposited into Temple Shalom's Unrestricted General Endowment Fund, unless otherwise specified by the maker of the bequest.

H. LIBRARY DONATION POLICY

1. Donations of books, magazines, audio visual materials, or funds to the Temple Shalom Library are welcome. Funds should be donated to the Library Fund through the Temple office. Donated materials should meet the following criteria:
 - a. Hardcover books are preferred.
 - b. Books should be new or gently used.
 - c. Books should be current. Books should not be more than 20 years old, unless of uncommon value.
 - d. Non-fiction books should be of Judaic content, or relate to Judaism in some manner.
 - e. Fiction books should be of Jewish content or written by a Jewish author.
2. The Library committee reserves the right to deny shelf space to materials that do not meet the above criteria, are out of date, or duplicate existing materials. Such materials will be appropriately recycled.
3. The donation of funds for new books, or the donation of new books will be recognized by a book plate in the book(s).

I. RELIGIOUS SCHOOL/HEBREW CLASS ATTENDANCE POLICY FOR STUDENTS IN KINDERGARTEN THROUGH 7th GRADE

At Temple Shalom, one of our greatest values is the education of our students. For our students in Kindergarten through 12th grade, it is our goal to work with families to enhance the learning that takes place at home. (A policy for attendance in 8th-12th grade already exists.) In order to effectively promote our vision and reach our goals each year for our children, the

students need to attend class regularly to benefit from the learning opportunities. This policy includes the following:

1. Students must attend a minimum of 75% of the Sunday classes.
2. Students in grades 3 through 6 must attend a minimum 75% of Midweek Hebrew classes.
3. If a student misses more than 25% of Sunday classes, s/he and her/his parent(s) or guardian(s) will need to meet with the Director of Lifelong Learning to create an assignment to "make up" the work that is missed.
4. If attendance or make up work is not complete, the student may not matriculate to the next grade level.
5. Students with exemplary attendance may be recognized for such excellence.

J. POLICY ON COMMUNITY INFORMATION IN FOYER RACKS

Information from community organizations and/or community events may be placed in the foyer rack with the express consent of the Executive Director, who also has the right to remove said information when it is no longer timely or space limitations require it.

K. HARASSMENT POLICY

Temple Shalom believes strongly in promoting respect and fairness in our community. In keeping with that belief, the Temple is committed to providing an environment free of all forms of harassment, including sexual harassment. Harassment is unacceptable at Temple Shalom whether it comes from, or is directed toward, Temple employees or other persons acting on behalf of the Temple, including Board members, vendors, contractors, volunteers, or parents. Harassment is also unacceptable if it comes from, or is directed toward, our members or their families.

"Harassment," as the term is used in this Policy, means unwelcome conduct directed at a person because of his or her race, color, religion, age, sexual orientation, sex, national origin, ethnicity, citizenship, military status, marital status, physical and mental disability, or any other characteristic protected by law, when the conduct creates an intimidating, hostile or offensive environment that causes work performance to suffer, adversely affects job opportunities, or interferes with the ability of our members to pursue their Temple activities.

"Sexual harassment" includes unwelcome sexual advances, unwelcome requests for sexual favors, unwelcome physical contact of a sexual nature or unwelcome verbal or physical conduct of a sexual nature. Sexual harassment includes conduct directed by a person at another person of the same or opposite gender. Unwelcome verbal or physical conduct of a sexual nature includes but is not limited to the deliberate making of unsolicited gestures or comments of a sexual nature; the deliberate display of offensive sexually graphic materials which is not necessary for business purposes; or deliberate verbal or physical conduct of a sexual nature that is sufficiently severe to interfere substantially with an employee's work performance or to create an intimidating, hostile or offensive environment.

Examples of harassment that may violate the law and that will violate this policy include:

- Oral or written communications that contain offensive name-calling, jokes, slurs, negative stereotyping, or threats. This includes comments or jokes that are distasteful or targeted at

individuals or groups based on race, color, religion, age, sexual orientation, sex, national origin, ethnicity, citizenship, military status, marital status, physical and mental disability, or any other legally protected status.

- Nonverbal conduct, such as staring, leering or giving inappropriate gifts.
- Physical conduct, such as assault or unwanted touching.
- Offensive visual images, such as derogatory or otherwise offensive pictures, cartoons, drawings or gestures. Such prohibited images include those in hard copy or electronic form.

If any employee of Temple Shalom believes that he or she has been subjected to harassment, or if any persons believe they have either experienced or witnessed harassment in their activities at Temple Shalom or at an event sponsored by Temple Shalom, they may want to make it clear to the offender that such behavior is unacceptable. If the behavior is serious or it continues, the incident(s) should be reported promptly to Temple Shalom's Executive Director, the Temple Ombudsman, and/or to any member of the Executive Committee. The allegations must then be communicated promptly to the Executive Committee as a whole, which is ultimately responsible for directing any investigation and disposition of the complaint.

No Temple employee or congregant will be adversely affected because he or she has complained about harassment.

Because of the private nature of many harassment incidents, Temple Shalom will take reasonable steps during any investigation to preserve the privacy of the parties. It is generally expected that an informal resolution can be reached. Sometimes harassment is unintentional and due to a lack of understanding and sensitivity. Where appropriate, however, the Executive Committee can take disciplinary steps, including but not limited to termination of employment or membership, in accordance with the severity of the incident.

L. SMOKING POLICY

Because we care about the health and comfort of our congregants, Temple Shalom prohibits smoking, including the use of electronic smoking devices and smokeless tobacco anywhere on Temple Shalom property, except for a designated outdoor smoking area.

M. GUNS/FIREARMS POLICY (Passed 12/1/2014)

It is Temple Shalom's policy, consistent with Texas law, to prohibit guns and firearms on Temple Shalom property other than those guns or firearms held by those hired for the security and safety of Temple Shalom, as well as active duty military personnel, sworn peace officers or court officers in the discharge of official duties. (Texas Penal Code §46.035.)

Violation of this policy shall result in the immediate direction for the individual possessing a gun or firearm to remove any gun or firearm from Temple Shalom property and to not repeat the violation. Violations of this policy may result in the notification and involvement of local law enforcement and/or Temple Shalom membership suspension, revocation or cancellation by majority vote of the Temple Shalom Board of Trustees.

N. PRIVACY AND USE OF IMAGES

Temple Shalom members and their families may be photographed or videotaped if they attend Temple activities, or they may be recorded in Temple Shalom video stream programs. On occasion, these images, and the identity of the persons depicted, may be used by Temple Shalom for educational, instructional, development and/or informational purposes in print, internet and digital media, including in news releases (e.g, Texas Jewish Post) and/or printed publications or materials, electronic publications, or websites.

Temple Shalom will not sell images of Temple Shalom members or their families to third parties, and it will not use their images for promotional or advertising purposes that do not concern Temple Shalom and its programs.

O. VIDEO STREAMING POLICY

I. General Statement of Video Streaming Policy

The Temple Shalom website will display video streams of Friday night Shabbat services and other selected religious services conducted in the Temple Shalom Sanctuary or the Epstein Chapel.

Persons who arrange for the video streaming of special religious events that will involve persons outside the congregation-- such as B'nai Mitzvot, Weddings, or Funerals-- are obligated to inform participants that their images may be broadcast.

II. Friday Night Shabbat Services

Friday night Shabbat services will be broadcast live every week. Services may be viewed via live stream and will also be available "on demand" from the website's video archive.

Friday night Shabbat services will be accessible to the general public and will not require a password.

III. High Holy Day Services

High Holy Day Services will be scheduled for broadcast from the Sanctuary at the times indicated in the Temple schedule. Services may be viewed live and also "on-demand."

Video streaming of High Holy Day services will be available *only* to Temple Shalom Members and will require a password. Requests for a password to view these services can be made to the Executive Director.

IV. B'nai Mitzvot and Weddings

B'nai Mitzvot and Wedding services may be broadcast from Temple Shalom, on a best efforts basis, if a Temple Shalom family member requests this service at least one week in advance. The family member making the request must fill out a request form available at the Temple Shalom office and pay an administrative fee. If the family member requests an operator to pan and zoom to follow the action, this additional service will depend on the vendor and will require an additional charge.

Video streaming of B'nai Mitzvot and Wedding services can be broadcast to nonmembers, but will require a password. The Temple Shalom family member making the request will receive the password for guest viewing, and will also receive instructions for making a broadcast download.

V. Funerals

Funeral services conducted at Temple Shalom will be broadcast if requested by a Temple Shalom family member at the earliest convenience, and if the time available is sufficient to make video streaming arrangements. The family member making the request must fill out a request form at Temple Shalom office, but no administrative fee will be required.

Video streaming of a Funeral Service can be broadcast to nonmembers, but will require a password. The Temple Shalom family member making the request will receive the password for guest viewing.

VI. Miscellaneous

Video streaming of non-religious programs or services, or of religious services other than those listed above, will not ordinarily be available.

Video streaming of events involving outside performers will require pre-clearance the Executive Director at least one week in advance of the event as well as written consent from the performer(s).

Any inquiries about these video streaming policies and practices should be directed to the Executive Director.

P. SURPLUS FUNDS DESIGNATION

Beginning with the 2022-2023 fiscal year, any surplus funds will be designated for the building reserve fund.

Q. GRANT PURSUIT AND ACCEPTANCE POLICY

Purpose

This policy establishes guidelines for staff members and lay leadership of Temple Shalom to pursue grants that align with the organization's mission and values, ensuring transparency, accountability, and alignment with the congregation's goals.

Policy

1. Grant Pursuit

- Staff members are authorized to seek grants from external sources to support projects, programs, or initiatives that align with the mission, values, and strategic priorities of Temple Shalom.
- Lay leaders are expected to work with a staff member in pursuit of grants.
- Grant-seeking activities must be conducted in accordance with applicable laws, regulations, and ethical standards.

2. Grant Criteria

- Grants pursued by staff members and lay leaders must align with the mission, vision, and values of Temple Shalom.
- Grants should support initiatives that contribute to the congregation's strategic goals and priorities.
- Consideration should be given to the potential impact, feasibility, and sustainability of proposed projects.

3. Notification

- Those pursuing grants are required to have approval from the Board of Trustees before application can be made.
- Staff members and lay leaders must inform the Executive Director or President about the grants they intend to pursue, in order to have the topic placed on the next Board Meeting agenda.
- Important information that should be shared with the Board includes the name of the granting agency, amount being requested, proposed use of the grant funds, matching funds the congregation will be expected to provide (if applicable), timing of the grant process, anticipated outcomes, and the name(s) of the person/people who will be overseeing the grant.

4. Grant Application Process

- Staff members responsible for grant pursuit shall prepare and submit grant applications in accordance with the requirements and deadlines specified by the funding agency.
- Grant applications should accurately represent the goals, activities, and budgetary needs of the proposed project or program.

5. Grant Acceptance

- Upon notification of a grant award, staff members shall promptly inform the Board of Trustees and provide relevant details, including the amount awarded, funding period, and any associated terms or conditions.
- The Board of Trustees reserves the right to review and vote to accept or decline any grant awarded to Temple Shalom that does not meet the original criteria proposed in the notification phase.

6. Grant Reporting and Accountability

- Staff members and lay leadership responsible for grant-funded projects are accountable for the proper utilization of grant funds and adherence to reporting requirements specified by the funding agency.
- Regular progress reports on grant-funded projects shall be provided to the Executive Director, including updates on project milestones, financial expenditures, and outcomes achieved.
- Any deviations from the proposed project plan or budget must be communicated to the Executive Director in a timely manner and may require Board approval before implementation.

7. Conflicts of Interest

- Staff members and/or lay leaders involved in grant pursuit and acceptance must disclose any potential conflicts of interest related to grant funding, ensuring transparency and integrity in the decision-making process.
- Conflicts of interest shall be managed in accordance with Temple Shalom's Conflict of Interest Policy.

Implementation and Review

This policy shall be communicated to all staff members and lay leaders responsible for grant pursuit and acceptance. Periodic reviews of this policy shall be conducted by the Board of Trustees to ensure its effectiveness and alignment with organizational objectives.

Approval

This policy was approved by the Board of Trustees of Temple Shalom on 4/1/2024.

Amendments

Any amendments to this policy must be approved by the Board of Trustees and communicated to all relevant staff members.