

NATA INSTITUTE COURSE OUTLINE

MEMBERSHIP AND PUBLIC RELATIONS

Membership

Committee

Purpose

Make-up of Committee

Recruitment

Motivation for Affiliation

Methods of Recruitment

Integration

Retention

Volunteers

 Recruiting

 Motivating

 Retaining

Programming

 Purpose

 Defining Needs

 Designing the Program

 Funding

 Evaluating

Public Relations

Objectives

Defining Constituencies and How to Reach Them

Bulletins

Web Site

E-mail, list-serve

Mailings

PERSONNEL

Effective Management

Selection

Define Job

Select Criteria

Find Candidate

Hire

Direction

Provide Guidance and Tools for Success

Discuss Employee Handbook and Other Documents

Assessment

On-going, Informal
Annual Review

Kinds of Assessments

Subjective

Critical Incident Technique

Ranking System

Poor Assessment

How to Handle

Rewards

Purpose

Kinds of Awards

Merit

Automatic

Non-pay

Termination

Documentation

Process

Legal Issues

Timing

Compensation

Exit Interview

Staff Meetings

Who Attends

Who Presides

How Often/Agenda

BUDGETING AND FINANCE

Budgets

Define a Budget

Process

Preparation

Timing

Typical Budget

Standard Income Items

Dues Structures

Fixed Minimum Dues

Dues by Category

Fair Share

Use of Facilities

- Catering
- Cemetery
- Other Sources of Operating Income
- Standard Expense Items
- Fixed Costs, Personnel, Mortgage, etc.

Departments/Committees within Congregation

- General and Administrative
- Facility and Maintenance
- Reserves, Capital Improvement, Computers, etc.
- Committees Involved in Preparation and Timetable
- Monitoring the Budget
- Management Reports
- Trial Balance
- General Ledger
- Balance Sheet
- Assets and Liabilities
- Fund Balances
- Cash vs. Accrual
- Debits and Credits
- Accounts Receivable and Accounts Payable
- Profit and Loss Statement
- Cash Position Statement
- Treasurer’s Reports
- Capital Budgeting
 - Standard Capital Items
 - Long Range Planning

Endowment Funds

- Purposes
- Types
- Restricted
- Unrestricted
- Building Funds

Sources of Endowment Funds

- Memorial Giving
- Naming Opportunities
- Membership in Perpetuity
- Others
- Gifts in Kinds
- Gifts of Tangible Property

Fund Raising

- Annual Giving
- Special Events
- Capital Campaigns
- Planned Giving
- Bequests
- Life Insurance
- Gift Annuities and Life-income

Trusts

Investments

- Objectives
- Policies
- Committee
- Audits
- Definition

Review

- Compilation
- Audit
- Internal Controls
- Report

TECHNIQUES AND TOOLS OF SYNAGOGUE MANAGEMENT

Office Operations

- Membership Services

Office Equipment

- Purchase vs Lease
- Maintenance Contracts

Record Keeping

Corporate
Organizational
Constitution and By-laws
Minute Books
Board Manual
Policy File
Personnel Records
Membership Data
Storage
Purging

Computers

Hardware and Software
Future Needs

Purchasing

Procedures
Inventory Control

Building and Grounds

Maintenance
House Committee
House Rules
Use of Facilities
Facility Management
Repair and Upgrade

Custodial Staff

In-house
Out-source
Working with Contractors

Accessibility

Audit and Accommodations

Energy Conservation

Security and Safety

Audit
Handbook
Training

Cemeteries

Operations
Sales
Record Management

Décor and Fine Arts

Policies
Donations, Purchases and Acquisitions

Insurance Coverage

Property/General Liability
Officers and Directors
Employee Dishonesty
Long Term Disability
Life
Health
Long Term Care

Employee Pension 403-B or 401-K

GOVERNANCE

The Board

Responsibilities
Composition
Nomination and Election Process
Nominating Committee
Orientation
Agenda
Duties of Officers
Executive Committee
Constitution/By-laws

Committees

Purpose
Recruiting Committee Members
Responsibilities of Committee Members
Committee Procedures
Role of Administrator with Each Committee

Leadership Development

Establishment of Program
Implementation of Program
Recruiting Future Leadership
Characteristics of Leaders

HISTORY OF REFORM JUDAISM

Origins of Reform
Important Historical Events
Enlightenment
Scientific Discovery
Economic
Social
Political
Reform in America
Reform Today

LITURGY

Evolution of the Reform Siddur
Elements of the Service

Matbea Ha-Tefila: The Matrix of Prayer
Introduction /Preparations I
Birchot Ha-Shachar
Preparations II
Psukei D,Zimra (Psalm Selections)
Affirming God,s Unity for Israel
Shema and Its Blessings
Barchu
Yotzer (Creation)
Ahava Raba (Revelation)
Shema and Baruch Shem
First Paragraph (V,ahavta) ^ Acceptance of Yoke of God,s Rule
Second Paragraph (V,haya im Shamo) ^ Acceptance of Yoke of Mitzvot
Third Paragraph (Vayomer) ^ Tzitzit
Geulah (Redemption)

The Prayer
Amidah (Shmoneh Esrey/Eighteen (now 19)
Benedictions
Avot
Gevurot
Kedusha (On Shabbat and Festivals these 13 petitions are replaced by the Kedushat Ha Yom, special prayers proclaiming the sanctity of that particular day)
Knowledge
Repentance
Forgiveness
Redemption

Healing
Prosperous Year
Gathering of Exiles
Justice
Against Heretics/Evil
The Righteous
Rebuilding Jerusalem
Messianic Rule
Acceptance of Prayer (Shema Koleinu)
Avodah (Acceptance of Worship)
Hodaah/Modim (Thankfulness)
Shalom (Peace)
Elohai N,tzor (Guarding Our Speech and Thoughts)

Other Prayers

Motzi
Berchat
Shechyanu
Sacred Texts and Jewish Literature
T'nach
Mishnah
Talmud
Commentary
Responsa
Prayer Book

CEREMONIES, HOLIDAYS AND PRACTICES

Life Cycle
Birth
Brit Milah
Brit Banot
Baby Naming
Pid,yon Ha-ben
Mohel
Education
Consecration
Bar/Bat Mitzvah
Confirmation

Marriage
Auf-ruf
Ketubah
Get
Breaking the Glass
Seven Brachot 'atzmaut

Death
Preparation of the deceased
Kaddish
Shiva
Sheloshim
Yahrzeit
Yiskor

Holidays

Rosh Chodesh
Shabbat
Rosh Hashanah

Yom Kippur
Sukkot
Shemini Atzeret
Simchat Torah
Hanukkah
Tu B'shevat
Purim
Pesach
Shavuot
Modern Observances
Yom Hashoah
Yom Ha