

# 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