

GENERAL POLICIES

EDUCATION

YESH REGISTRATION POLICY

- Registration in YESH is restricted to the children of Temple members or legal guardians who are Temple members.
- Members must be in good standing before a student may be registered.
- The YESH tuition and fees shall be set annually through the Temple budgetary process.
- Children of full-time, Jewish staff may attend YESH and Confirmation classes free of charge. B'nai Mitzvah tutoring fees and related Confirmation fees are excluded from this policy.

CONFIRMATION TUITION

- The Confirmation tuition shall be set annually through the Temple budgetary process.
- Tuition must be paid in full prior to enrollment.
- Fees for special events or programs associated with Confirmation must be paid in full before the event.

B'NAI MITVAH ELIGIBILITY

- Bar/Bat Mitzvah candidates must be a member or minor child of a member or legal guardian.
- Each child must be enrolled in YESH at the time of *Bar/Bat Mitzvah*, having successfully met all attendance requirements and having completed at least three consecutive years of religious education.

FINANCIAL OBLIGATIONS

- The Bar/Bat Mitzvah Fee shall be set annually through the Temple budgetary process.
- No Bar/Bat Mitzvah date request can be processed unless a member is in good standing.
- In the case of divorced parents who are both members, one parent will be designated the financially responsible party.
- The Bar/Bat Mitzvah fee is required in full to begin Blessings and Prayers lessons.
- A member must be in Good Standing in order to begin Bar/Bat Mitzvah tutoring and meetings with the Rabbi.
- Failure to pay all obligations up to date or to make satisfactory financial arrangements may result in the cancellation of the Bar/Bat Mitzvah.
- 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.
- There will be no refund to anyone moving to another congregation within a fifty-mile radius.

HOW DATES ARE ASSIGNED

- Dates will be assigned to those students/families whose Bar/Bat Mitzvah is no more than two years prior to their thirteenth birthday, which shall refer to the English date.
- A Bar/Bat Mitzvah service may be scheduled no more than (1) month prior to the child's thirteenth birthday.
- Dates shall be assigned in fifth grade or when the child's family joins Temple Shalom, whichever is later.

PRESCHOOL

- No child may attend Temple Shalom Preschool without documentation from a doctor certifying that he or she is current on CDC recommended vaccinations before beginning preschool.
- The Preschool tuition and fees shall be set annually through the Temple budgetary process.

PRESCHOOL TEACHER, TEMPLE STAFF TUITION DISCOUNT

- Teachers and full-time staff shall be offered a 50% discount off the full tuition rate for their own child(ren) enrolled in the Temple Shalom Preschool.
- Teachers must be currently employed by the school and work at least 20 hours a week at the school during the time for which the discount is requested in order to qualify for the discount.
- Specialists shall be offered a 25% discount off the full tuition rate for their own child(ren) enrolled in the Temple Shalom Preschool. The specialist must be currently employed by the school and work at least 10 hours a week at the school during the time for which the discount is requested in order to qualify for the discount. If a specialist teaches 20 hours or more, he or she is entitled to the 50% teacher discount.

CLERGY AND RITUAL

RABBI EMERITUS

- Temple Shalom welcomes former rabbis of Temple Shalom in the role of Rabbi Emeritus. 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.
- 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.
- 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.
- A Rabbi Emeritus ought not to engage in activities which interfere with the senior Rabbi's leadership of or relationship with, the congregation or community.

DIETARY POLICY

- Shellfish and pork products are not permitted on Temple Shalom property at any time.
- Meat and milk products shall not be used simultaneously in the same serving dishes at Temple events.
- Foods containing dairy, poultry and meat shall be designated as such.
- All events at Temple where food is offered shall include signage that says, "Temple Shalom is NOT a nut-free or gluten-free facility. If you have concerns about these or any other ingredients, please ask a staff member."
- Bread and related leavened products are not permitted at Temple Shalom during Passover.
- All catered meals and refreshments served on Temple property must be approved by the Facilities Manager. No outside groups may host a potluck meal.

POLICY ON MARRIAGE CEREMONIES

- Only Jewish religious symbols shall be present at marriage ceremonies or any related events at Temple Shalom.
- All ritual, such as readings, commentary and music at the wedding shall be consistent with Jewish tradition and approved by our clergy.
- All weddings at Temple Shalom must be officiated by Temple Shalom clergy and at Temple Shalom clergy's discretion, may be co-officiated by other Jewish clergy only.

TEMPLE SHALOM CLERGY DISCRETIONARY FUNDS

- Checks drawn on these accounts may only be written by the clergy for purposes in accordance with the CCAR and ACC guidelines for the use of discretionary funds, and Temple policy concerning such funds which includes an annual audit.
- 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 Temple Shalom Clergy Discretionary Funds shall be the recipient of all contributions designated for them.
- The Discretionary Funds may not be used for personal benefit to the clergy of Temple Shalom or their families. The clergy may use their Discretionary Funds to attend community events. Any such expenditures over \$500 must be approved by the President.
- 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.
- Donations, disbursements or transactions from the Discretionary Funds to charitable organizations shall only be made to those with §501(c)3 designations.
- Donations, disbursements or transactions from the Discretionary Funds shall only be made in the name of Temple Shalom.
- The Discretionary Funds may not be used to obligate the Discretionary Funds or Temple Shalom for future commitments to any organization.
- 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.
- Consistent with these policies, Temple Shalom Clergy Discretionary Fund distributions are under the sole control of the Temple Shalom Clergy.
- The Discretionary Funds are owned by, and are a fund of, Temple Shalom.
- 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.
- Individual donations to the Discretionary Funds may not be designated or restricted by the donor for a specific cause, person or expenditure.

Temple Shalom



One family, many connections

- 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.
- 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.

POLICIES ON SPOUSES WHO ARE OF OTHER FAITH TRADITIONS

- Family members from other faith traditions are encouraged to participate in life cycle events alongside their Jewish family. However, while participating in a life cycle event, the family members from other faith traditions shall not perform those acts during the ceremony that are or could be considered strictly Jewish.
- In the event that this policy does not address a particular situation, the Clergy shall have the discretion to make decisions on the involvement of the parent who is not Jewish in the life cycle event.

OUTSIDE ENGAGEMENTS

- Senior staff must first obtain permission of the President before accepting an outside engagement, including officiating at lifecycle events.
- The Executive Committee must review all supplementary engagements annually.

FACILITIES

SMOKING

Temple Shalom prohibits smoking, including the use of electronic smoking devices and smokeless tobacco anywhere on Temple Shalom property.

SECURITY

Security shall be hired for all third-party or Temple Shalom co-sponsored events held at Temple Shalom at the renter's or co-sponsor's expense when it is reasonably anticipated that more than 50 people will be in attendance

- Security must be provided during the following at Temple Shalom:
 - Preschool and Camp
 - Religious and Hebrew School
 - Shabbat and festival services
 - All fundraisers, social events and other functions held at Temple Shalom outside regular business hours services when it is reasonably anticipated that more than 50 people will be in attendance

FINANCE

- The Executive Director may authorize budgeted expenses up to \$5,000 apiece. Expenditures over that amount require the approval of the Treasurer, Financial Secretary or President.
- The Executive Director may authorize unbudgeted expenses up to \$5,000 apiece, not to exceed \$30,000 in one fiscal year.
- The "Sustaining Amount" is established by the Finance Committee, recommended by the Executive Committee, approved by the Board of Trustees and then approved by the Congregation for each fiscal year, from July 1 through June 30.
- Statements are sent to each member by July 15.
- Statements will be sent monthly, over the course of the year.
- The full pledge must be paid no later than April 1 in order to be considered in good standing.
- Temple Shalom does not accept cash payments over \$25.00.
- There shall be a service charge credit card charges under \$18.00 minimum for credit card payments.
- High Holy Day tickets will be mailed to each member who has returned their pledge form or communicated their pledge for that fiscal year and is not behind on any financial obligations to the Temple.
- Complementary memberships shall be offered to all full-time, Jewish staff members, their spouses and children under the age of 25 and living in the same household.
- Senior staff members and their spouses shall be guests of the Congregation at all meals and events held at Temple Shalom.
 - Sisterhood and Men's Club may opt not to extend that courtesy.
- Complementary memberships may also be extended to ordained members of the clergy living in the greater Naples area at the discretion of the Senior Rabbi.
- A financial review of the Auxiliaries shall be undertaken when the Temple finances are reviewed by the Treasurer or individual, qualified in accounting and/or tax law, who shall be jointly appointed by the Sisterhood President, Men's Club President, and the Temple President.

Temple Shalom



One family, many connections

- All expenditures over \$10,000 made from the Capital Reserve Account must be approved by the Executive Director, and the Treasurer or Financial Secretary. Expenditures over \$50,000 must be approved by the Board of Trustees.
 - This policy applies to all expenditures related to renovations and landscaping, including associated professional services and design services and all activity directed at the upkeep, renewal, and replacement of the Temple's physical plant. This policy also applies to the purchase of fixtures and furnishings. Fixtures are assets with an expected useful life in excess of one year that will be permanently affixed to Temple-owned property. All expenditures reasonably anticipated in connection with a single project shall be aggregated for purposes of this policy.
- Gifts of stock should be sold immediately upon receipt, or at the earliest possible opportunity to do so.

COMMITTEES AND AUXILIARIES

- Membership in Temple Shalom's auxiliaries is restricted to members of Temple Shalom.
- There shall be a voting seat for the President of the Sisterhood and the President of the Men's Club on the Board during their terms in office. In the event of a co-presidency, one president shall be designated to serve on the Board.
- Members of committees, havurot and other group activities is restricted to members of Temple unless explicitly stated.
- Trustees shall sign and return a conflict-of-interest disclosure form annually.
- Temple Shalom shall maintain Directors' and Officers Liability Insurance, with the amount being subject to approval by the Board of Trustees.
- When communicating to their entire membership or the congregation as a whole or large segments thereof, all committees and auxiliaries must work with the Temple office staff to create and send written and digital materials, which will originate and be sent from the Temple office database. Communications between and among committee/auxiliary members and their Boards may be sent via regular email by the committee/auxiliary members.

MISCELLANEOUS

- The Temple Shalom Directory shall not be used for any purposes not related to Temple business.
- Visitors to the Sanctuary shall be informed that Temple Shalom livestreams services and programs to the internet and social media platforms.
- Condolence messages sent from Temple to Temple members shall include Temple Shalom as a suggested charity for donations made in memory of the deceased unless the family explicitly requests otherwise.
- Members shall sign a release authorizing Temple Shalom to use their likeness upon joining Temple Shalom.
- Death notices sent to the congregation may include the option to donate in memory of the deceased to other non-profits in addition to Temple Shalom.
- In keeping with the spirit of Shabbat and the Jewish holidays, Temple Shalom members, volunteers, lay leaders, auxiliaries and staff shall refrain from conducting Temple business and communicating electronically on those days.