EXECUTIVE SUMMARY – Collaboration with Outside Organizaions

Background

In the December 2024, the chair appointed an *ad hoc* committee to to address the need for Chevrei Tzedek to clarify and streamline the process for partnering with outside organizations, and to make recommendations. Harriet Rubinson was appointed chair of the *ad hoc* committee.

Committee members are Cheryl Kaplowitz, Lisa Kornberg, Jen Overton and Harriet Rubinson (Chair).

Process:

The committee met monthly via Zoom and reviewed current processes and issues, researched approaches used by other synagogues and non-profits. This included discussions of root problems, causes and possible solutions based on lessons learn.

Proposal

1. The committee is proposing a Tier evaluation of all requests:
   - **Tier 0 -** Lowest level: lowest risk, still requires good judgment and must complete the process to affirm Tier level
   - **Tier 1**- Low risk, low visibility: requires formal process.
   - **Tier 2**- Higher visibility, higher risk: including shared branding, possible reputation risk but small.
   - **Tier 3**- Highest risk, highest visibility: formal affiliation, shared funding, long term commitment.

2. Anyone making a request to partner with an outside organization, regardless of the organization, the nature of the request or who the person is who is making the request, must first complete and intake form
   - The form is routed to an Administrator who assigns a tier to the request, using the proposed definitions.
     - for full transparency, everyone must go through this process including the Chair or the Rabbi
     - Tier Zero requires review but does not need approval
   - The Administrator sends the request to the appropriate approver using the Tier definitions.
   - The Administrator follows up to ensure a decision is made, and then informs the "requestor" of the decision.
   - The entire process should not take more than 2 weeks.

3. There is a special expedited process for "emergency" situations — i.e. decision that require rapid (48 hour) turnaround due to nature of request (e.g. signing onto a public letter, participating in a community rally with short notice)

***Need to determine who the Administrator responsible for the process will be – we recommend someone who is either an officer or member of the Coordinating Committee*

*** Need to determine how steps for approval differ or become more stringent based on assigned Tier*

List of "Pre-Approved" Organizations

The committee also reviewed the existing list of Pre-Approved Organizations. The revised list includes organizations with whom we have actual partnerships or history. An organization does not need to be on the pre-approved list to have the activity approved.

- Only organizations with whom we have a strategic partnership are on the pre-approved list.
- The pre-approved list is reviewed every two years, at which time new organizations can be considered.
- Organizations on the prior lists with whom we have no history of partnership have been removed from the list. (This is not a statement of the value of the organization, and we may in the future have a relationship which could then be reviewed for inclusion in the list.
- We also recommend that the organizations on the Pre-Approved List undergo a biennial (every 2 years) review by the COCO ~1 year following the election of new officers. Organizations may be removed and added at that time.

***Need to identify who spearheads this process for reviews the list and what the criteria will be*

Attached please find the following:

1. Written description of Tiers and examples including how Tiers will be implemented
2. Proposed revisions to Pre-Approved List
3. Proposed form for requesting collaboration