

**Chevrei Tzedek Ad Hoc Committee recommendations for
Tier Review & Approval Process
To Partner with Outside Organizations
May 2026**

Flow Chart for Handling Requests for Participation from Outside Entities

A. Internal Source of Request

Request generated by
Rabbi, officer, committee chair, member (all now referred to as contact person)

Online form completed by
contact person or
system administrator alerts appropriate contact person to complete form

System administrator
reviews completed form
obtains missing information
determines if outside entity is on the approved list

if yes, alerts contact person of assigned tier level
if no, contacts assigned person(s) to carry out vetting of entity; alerts
contact person of decision

See attached form for explanation and examples of Tier Levels

If Tier 0 - lowest risk, requires good judgment, no formal process
contact person to handle request per guidelines

If Tier 1 - low risk, low visibility, requires formal process
committee chair to oversee request
Rabbi (if generator of request) alerted to which committee chair to contact to collaborate

If Tier 2 - higher risk, higher visibility, requires formal process
CoCo or CoCo representative determines how/whether to proceed with request
communicates decision to contact person

If Tier 3 - highest risk, highest visibility, requires formal process
CoCo or CoCo representative determines how/whether to proceed with request
communicates decision to contact person

Request requiring short turnaround
system administrator contacts chair/vice chair to request quick decision
communicates decision to contact person

B. External Source of Request

Request received by

Rabbi, officer, committee chair, member (all now referred to as contact person)

Contact person

completes online form or alerts appropriate contact person of request and the

what need to complete online form or alerts system administrator if uncertain of to do

System administrator

reviews completed form

obtains missing information

determines if outside entity is on the approved list

if yes, alerts contact person of assigned tier level

if no, contacts assigned person(s) to carry out vetting of entity; alerts contact person of decision

See attached form for explanation and examples of Tier Levels

If Tier 0 - lowest risk, requires good judgment, no formal process

contact person to handle request per guidelines

If Tier 1 - low risk, low visibility, requires formal process

committee chair to oversee request

Rabbi (if generator of request) alerted to which committee chair to contact to collaborate

If Tier 2 - higher risk, higher visibility, requires formal process

CoCo or CoCo representative determines how/whether to proceed with request

communicates decision to contact person

If Tier 3 - highest risk, highest visibility, requires formal process

CoCo or CoCo representative determines how/whether to proceed with request

communicates decision to contact person

Request requiring short turnaround

system administrator contacts chair/vice chair to request quick decision

communicates decision to contact person

Tier Evaluation for Request to Participate with Outside Organizations

Tier 0 - Lowest level: lowest risk, still requires good judgment but not a formal process.

1. Using our Facebook page or LinkedIn Account to:
 - Share another organization's flyer without using "partner" or "co-sponsor" language
 - Posting about another organization's event or an event within the community that we are not officially sponsoring
2. Giving a verbal mention of an aligned community event without official synagogue engagement at announcements.

Tier 1- Low risk, low visibility: requires formal process.

1. Situations where Chevrei invites a person or group in
 - Inviting a guest speaker from a local nonprofit to a synagogue program
 - Inviting a local musician or storyteller to participate in a holiday program
 2. Situations where Chevrei members participates in external programs or events
 - Donating supplies to a nonprofit (e.g., hygiene kits, school supplies) without shared messaging beyond a flyer
 - Sharing a table at a community fair
- Participating with a local food pantry drive where the synagogue's name appears among a long list of community partners
- Participating in an interfaith volunteer day (e.g., park cleanup, Habitat build)
- A teen group joining another youth group for a service project

Tier 2- Higher visibility, higher risk: including shared branding, possible reputation risk but small.

1. Running a year-long adult education course co-sponsored with another synagogue or community organization
2. Jointly hosting recurring or monthly interfaith dialogues, prayer sessions, study groups or memorial services.
3. Annual or seasonal programs run together (e.g., a recurring shelter meal, climate justice working group, women's health initiative).
4. Co-branded film series, speaker series, or cultural festivals.
5. Consistent collaboration with a Jewish camp, youth movement, or family-service nonprofit where the synagogue's name is featured as an ongoing partner.

Tier 3- Highest risk, highest visibility: formal affiliation, shared funding, long term commitment.

1. Shared funding

- Collecting funds for a partner organization as part of a synagogue campaign (tzedakah drive).
- Entering into a fiscal sponsorship or jointly applying for a grant
- Donating funds to another organization

2. Partnerships

- Institutional affiliation, signed MOU, advocacy on behalf of synagogue, public/political endorsements,
- Joining a network or becoming a formal member of a coalition (e.g., climate coalitions, racial justice coalitions, statewide advocacy networks).
- Partnering with an organization on public demonstrations, rallies, or political statements.
- Any partnership connected to highly sensitive issues within the Jewish community or broader community (Israel/Palestine work, reproductive rights, policing, immigration justice, etc.), especially if public-facing.
- Partnerships with international humanitarian organizations where due diligence is required (vetting of governance, anti-extremism checks, compliance risks).

3. Publicly endorsing a policy platform or advocacy campaign as a synagogue.