Torah in Motion Administrative Guidebook

1. Contacts

- Rabbi Kelman:
    - rabbijay@torahinmotion.org
    - (416) - 953 - 0443
- Ilana Kelman:
    - ilana@torahinmotion.org
- David Callender (for tech issues and trimming videos/audio):
    - techsupport@torahinmotion.org
    - (416) - 938 - 4353
- Emily Zhang
    - bookkeeping@torahinmotion.org
- Website: Alan Dixon (reach through Ilana)
- Graphics: Paula Rutledge
-

Reminder of confidentiality:
Please do not ever give out the private contact info (phone number, email….) for anyone at TiM -not staff, speakers or participants.

As a policy we always need to get permission from Rabbi Kelman first.

2. Creating a program page

- Hover over 'Content' on the navigation bar at the top of the website
- Hover over 'Add Content'
- Click on 'Program'
- Fill in program name, make sure it starts with "e-TiM: "
- <u>For a multipart series</u>:
    - In 'Body', fill in the program dates and times with the following format:
        - This will be an ongoing series (or a six-part series, etc) taking place at 11:00 am -12:00 pm Eastern
        - **Title:** Part 1: Tuesday, June 9
        - **Title**: Part 2: Tuesday, June 16
        - Etc
    - If each lecture has a different speaker, then add in the name of speaker in italics and make sure to add them in the speaker option below.
        - Ex: **Title**: Part 2: Tuesday, June 16 *with Rabbi Jay Kelman*
    - In 'Program Date(s)', input the dates and times of each program (if there are multiple sessions, every single one needs to be in with the start and end time) *is there a quick tip here?*
    - In the 'Program Dates' section below: write
        - **Eg. Thursdays, 8:30 pm Eastern Time (note: both sections must be filled in)**
- In 'Programs*', select either live, online or travel appropriately
- In 'Registration', select the appropriate series that people will be registering for in order to be part of this program *how does the new series get in this list?*
- In 'Image', select 'Choose File', and select the appropriate banner for the event
    - Once the banner is chosen, click 'Upload' *where do banners (images) come from?*
- Select appropriate venue (leave blank if online)
- Add in all of the speakers in the 'Leaders and Speakers' section
- In 'Schedule', you may need to place a housekeeping note, but ask Ilana and RJK
- ^This may not be necessary if the program is not part of a larger series, so inquire about that.

Add in speaker where it asks to do so. If the speaker is not yet in the system, create the bio.

- At the bottom of the page, select 'Save'

3. Creating an unpublished program page

- Follow all of the steps from 1. Creating a published program page but STOP at the last step
- Under ‘Revision Information’, click on ‘Publishing options’ and ‘Published’ will be pre-selected
- UNselect ‘Published’
- At the bottom of the page, select ‘Save’
- The page should then have a pink background and say ‘UNPUBLISHED’

4. Adding a poster or picture to a program page

- Go to the program page
- Under ‘Edit’, scroll down to where it says ‘**Image**’
- Select ‘Choose File’
- Choose the correct image and scroll down to click ‘Save’

5. Adding a source sheet to program page

- Go to the program page
- Under ‘Edit’, scroll down to where it says ‘Details’
- Select ‘Choose File’ and choose correct document
- Click ‘Upload’
- Type the description as follows:
    - SOURCES: Title of Program, part in series, Title of class,
    - Example: Sources: Intro to Midrash, Part 4, Reuven Saves Yosef
- At the bottom of the page, select ‘Save’

6. Adding an audio recording

In order to add a recording

- the recording needs to be downloaded from Zoom, saved to your computer

-renamed using this convention

1. speaker last name, first name
2. Program Title, (if applicable)
3. lecture title, (if applicable)
4. number in series (if applicable)

And then uploaded to the website

- Hover over ‘Content’ on the navigation bar at the top of the drupal part of the website
- Hover over ‘Add Content’
- Click on ‘Podcast’
- Fill in podcast name
- If part of a series, indicate if it is part 1, 2, etc…
- In ‘Program’, write the name of the program that the podcast is from
- Under ‘Podcast’, click ‘Browse’, and select the correct audio file (must be mp3)
- Once audio file is selected, click ‘Upload’
- Add in all of the speakers in the ‘Leaders and Speakers’ section
- If there is a source sheet, upload it to the ‘Source Material’ section
- Under ‘Catalogue’, select all topics that the podcast content falls under (hold down the ‘command’ key to select multiple topics
- At the bottom of the page, select ‘Save’

Double check

-that file has been edited

-that file has been uploaded

-that there are no typos in the title

-that the title and number in the series are correct

7. Trimming a podcast

*The following instructions are for a Mac computer
*Assuming the audio is an MP4

- Open audio file in iTunes
- Double click the proper audio file and click ‘Get Info’
- Click on ‘Options’
- Select the boxes next to ‘start’ and ‘stop’
- Input the start and end times
- Click ‘OK’
- Highlight the audio file
- Click ‘File’ on the navigation bar at the top of your computer
- Hover over ‘Convert’ and select ‘Create MP3 Version’ (if your default says something other than ‘Create MP3 version, see below)
- A new version of the file that is trimmed will be created in iTunes as an MP3 file, which you can then post on the website
- Make sure you name the podcast as follows: Title of program, name of speaker, part 1
    - For example: Introduction to Midrash Simi Peters (Part 4)
- <u>Changing default for converting audio files to MP3:</u>
    - Open iTunes
    - Click the ‘**Music**’ tab on the navigation bar at the top of your computer
    - Click ‘Preferences’
    - Click ‘Files’
    - Click ‘Import Settings…’
    - Under ‘Import Using’, click ‘MP3 Encoder’
    - Select ‘Good Quality’ (128 kbps)

8. Posting YouTube videos

- Log in to the youtube@torahinmotion.org email account on Google
- Go to YouTube
- Select the Torah in Motion icon on the top right corner and select ‘YouTube Studio’
- At the top right, select the box with the camera that says ‘CREATE’
- Select ‘Upload videos’
- Select appropriate video file
- Fill in the video title, which should end with ‘... || Speaker Name’
- Under ‘Thumbnail’, select ‘Change’, and upload the appropriate thumbnail image
- Under ‘Playlist’, if the video is part of a series with a playlist, select the appropriate playlist and it will automatically be added
- Under ‘Audience’, select ‘No, it’s not made for kids’
- Under ‘Visibility’, select ‘Public’
- Finally, select ‘Publish’ and wait for it to load

9. Trimming a YouTube video

- Once a video is fully uploaded, go into the YouTube Studio and select ‘Videos’
- Hover over the video you want to trim, and select the pencil icon to enter the video ‘Details’
- On the navigation bar on the left, select ‘Editor’
- Select ‘TRIM’, and then move the blue bars on either end of the video to the appropriate times
    - On the bottom right corner of the square of the video, there are magnifying glasses to indicate trimming for more specific use.
- Once the bars are placed properly, select ‘PREVIEW’ on the bottom
- Then select ‘Save’, and wait for the video to update with the trimming

10. Making a banner for main page

It seems this has rarely been done - am I correct to say we likely don't need to do this?
This was on the old website, so generally no longer needed.

- Hover over 'Content', then 'Add content'
- Click on 'Slide'
- Fill in the title of the event
- In the 'Body' section, fill in the program information in the following format:
  Sundays, 11:00 am Eastern
  Online with Rabbi Adam Mintz
- Under 'Slide Link':
  - Fill in the 'Title' section with: For more information, click here!
  - Fill in the 'URL' section with the URL of that program's page
- Make sure to fill in end date according to the instructions found on page.
- Use the picture that is the same as the graphic used for that program

11. Creating a bio profile (speaker profile)

- Click on ‘CiviCRM’
- Search for the person you’re making a profile for (odds are, they’re already in the system)
- If they’re not there, hover on ‘Contacts’
- Click ‘New Individual’
- Enter their first name, last name and email address
- Click ‘Check for Matching Contact(s)’ and see if the person already exists
- If not, go to the bottom and click on ‘Tags and Groups’
- Under ‘Tags’, click ‘Drupal User’
- Click ‘Save’ (This will make them exist on Drupal in order to feature as a speaker on the program page).
- To get the drupal account made you need to:
- 1. In the drupal PEOPLE tab: add the person with the photo
- 2. in the drupal CONTENT tab: add the profile
  WHEN DOING THESE BE ABSOLUTELY CERTAIN THAT YOU MAKE THE AUTHORING INFO THE PERSON YOU ARE ADDING (OTHERWISE THIS WILL CHANGE YOUR PROFILE BECAUSE IT WILL THINK YOU ARE THESE PEOPLE
- Make the profile title exactly the same as it was on the page where you added the photo
- In order to make this person available to select on the program Page (an administrator eg Ilana needs to change their settings, you can’t go on unless you ask Ilana to do this), once this is done, you can add the person to the program as a speaker (this is only true for new speakers, speakers who have spoken before will already be speakers in the system)
- Add the person’s bio under ‘Bio’
- Click ‘Authoring Information’
- Under ‘Authored by’, erase your name and put in the name of the person whose profile you are making THIS IS IMPORTANT
- Click ‘Save’

12. Creating a new registration form

Is this the autoresponder?
Why do some programs in the past not have a registration field selected?

- Go to 'CiviCRM', hover over 'Events
- Click on 'New Event'
- Fill in required information. Make sure the name starts with e-TiM (for online class)
- All online classes should be categorized as "series", even if they are single classes
- Participant listing: should be no participant listing (to disable this, click on the X on the right of the box, the default is name only)
- Make sure it is not a public event (public events populate to event calendars incorrectly) -do not check the box
- Dates: There are 2 places where dates need to be entered (on info and settings page and the online registration page) *where can I see either of these?*
- 1.on the info and settings page the dates should be the start date and time and end date and time for the series
- 2. on the online registration page the start dates should be the start of registration (can be immediate) and the end date should be the day after the end of the program)
- Location: Online
- Click on 'Continue'
- Click on 'Online Registration'
- Use generic text for the 'Introductory Text' and put it in HIV normal font block style.

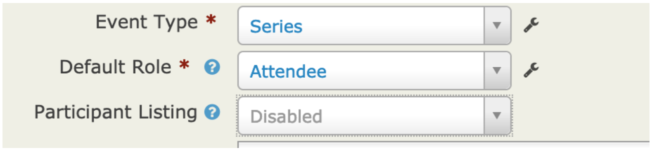
While our online classes are offered at no charge, your donation to support the learning is greatly appreciated. Please enter a donation below.

For a Canadian tax receipt, please donate here. Thank you.

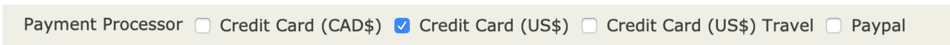
- Fill in 'Registration Start Date' and 'End date'
    - Make start date the day you create the registration, end date one day after the last class
- Under 'Confirmation Email', Click 'Yes'
- Fill in the text for the automatic response that will be sent to anyone who registers
- Make sure its CONFIRM FROM NAME: Torah in Motion and not the email
- The Bcc confirmation should go to Info@torahinmotion.org
- Back to the top, click on 'Fees'
- Even if it is a free event (it usually is), click 'Yes' for 'Paid Event'
- Currency → USD ($)
- Fee Label → Donation
- Financial Type → Donation, US
- Price Set → Optional donation for free event, US$ Precious metals (unless you are told otherwise)

If this is a paid event (ie there is a charge and not an optional donation)
Fees should be set as Event Fee US (usually) or Event Fee Canada (only if it is an in person event in Canada)

Jewish Medical Ethics needs careful attention to payment type and currency. (please ask for clarification)
*Only one payment type and currency is possible in a single payment (regardless of what is specified).



e-TiM events should say this.



payment

13. Find podcast download statistics

- Click on 'Reports' on the top navigation bar
- Click on 'Download Counts'
- On the right side of the screen, click on 'Details All'

14. Make old podcasts appear to have been uploaded on their actual date

- Do normal podcast uploading process
- Before pressing save, click on ‘Authoring information’
- Under ‘Authored on’, change the current day’s date to the date the event occurred

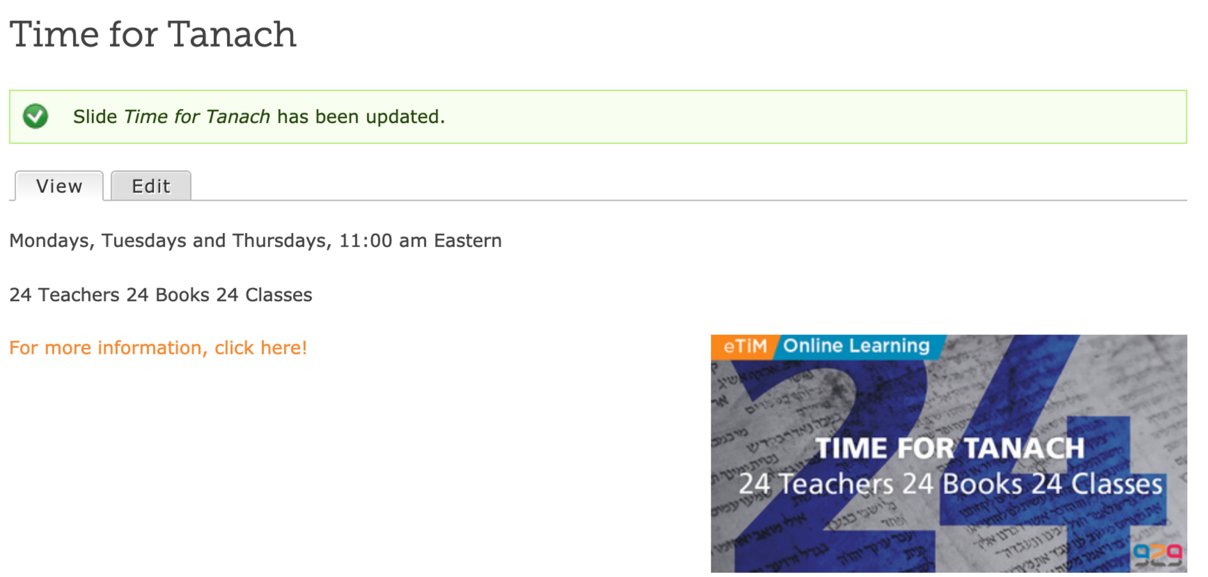
15. Creating a new price set with fixed amounts

- Click on ‘CiviCRM’
- Hover over ‘Events’ at the top and click on ‘Manage Price Sets’
- Find the price set titled ‘Optional donation for free event with 24 multiples, US$’
- At the right side, click ‘more’, and then click ‘Copy Price Set’
- Find the copy you just created and change its name from its copied name
- On your new price set, click on ‘View and Edit Price Fields’ on the right side
- Ignore the first row titled ‘Donation (USD)’ with a $1.00 price
- In the second row, click on ‘Edit Price Options’
- On each price option, you will see a button called ‘Edit Option’
- For each price, edit the title and amount you want

16. Creating and deleting program slides (on home page)

-not applicable on new site

- Creating:
- Hover over ‘Content’, ‘Add content’, and then click on ‘Slide’
- Write program title under ‘Title’
- Write program date(s) and time(s) under ‘Slide Text’
- Add slide photo
- Under ‘Slide Link’, where it says ‘Title’, write ‘For more information, click here!’
- Under ‘URL’, put the URL to the program page
- When making the slide, put in the expiry date of the day after the program end date and it will disappear automatically -then we do not need to delete thme
- Deleting:
- Search for the program whose slide you want deleted
- You may need to scroll a bit, but there will be a link with the program name that takes you to a page that looks like this (do not confuse with program page itself):



-
- Click ‘Edit’, scroll down and click ‘unpublish
-

17. Putting a Flyer into an Email

- Convert from pdf to jpg.
- Go to CIVI
- Create new mailing
- Choose “ad hoc mailing” template
- Scroll down under automatically generated TiM banner
- Remove words “ad hoc message goes here.”
- Click on the image icon on gray menu bar (looks like a picture of a sun and two mountain peaks)
- Click on “upload” tab
- Click on “choose file” button
- Select your converted jpg image
- Click on “send it to server” button
- Image will appear in “preview” box.
- Decide how big you’d like it. I usually make it about 600 wide, height adjusts automatically
- Click “ok”
- Click on automatically generated TiM banner and delete
- Left click on image and select “image properties”
- Select “link” tab (you can probably select “link” tab from where you’re sizing it, too)
- Copy and paste page link where it says url
- Click “save draft”
- Click “send test."

18. Saving a source sheet from Sefaria

Did you mean Safari?

- Open up the source sheet
- Click ‘File’ on the navigation bar at the top of your screen
- Click ‘Print’
- Under ‘Destination’, click the drop down and select ‘Save as PDF’

19. Adding a User in Zoom

- Go to 'User Management'
- Click '+ Add Users'
- Type in the email address of the person you want to add
- Select their user type (You need to do 'Basic', or pay to have more than two 'Licensed' users on your account)
- Click 'Add'

20. Assigning a license to a user on Zoom

- Go to ‘User Management’ and click ‘Users’
- Find the user you want to add a license to and click ‘edit’
- Where it says ‘User Type’, select ‘Licensed’
- Once you do this, this user can be made an alternate meeting host

21. Zoom Speaker confirmation:

We are looking forward to your participation in the eTim: Torah in Motion online Beit Midrash. Class Title, date, time
Zoom Information:
Now that most Torah learning occurs on Zoom, we know you are most likely accustomed to most of these guidelines. Please be sure to read these as some are special to Torah in Motion.

1. Login information:

(Please do not share this information. For security purposes, we require all participants to register through our website.)
Please click CHANGES FOR EACH MEETING Provide ZOOM login

2. Timing:

The lecture will begin at ______________**Eastern**. Please come on to Zoom **7-10 minutes early** so that we can ensure that your screen sharing is working properly and that there are no technical difficulties, as we start promptly.
You will be speaking for **1 hour**, leaving time for questions at the end.

3. Questions:

We recommend that you do not worry about answering the questions in the chat box until the end of the lecture, and answer all questions at the end of the hour.

4. Video/Audio Quality:

Please be sure to position your camera on your upper body; to ensure clear audio, please sit in a quiet space and/or use headphones with a microphone (if available to you), and make sure you are in a room with solid internet connection.

5. Recording:

All lectures will be recorded and posted on our website and YouTube shortly after they occur.

6. Publicity:

Please **spread the word** to your communities and congregations! We ask that you do publicize this to potential participants! The registration link is below: https://www.torahinmotion.org/programs/

7. Source Sheets:

If you have a source sheet or slide show ready in advance of your shiur, please send it in a response to this email so that we can make it available to participants.

8. Hebrew Phrases:

Please ensure that all technical hebrew phrases are translated into English. Most of the people coming are native English speakers

Confirmation:

1. Bio and picture:

Please send us a recent photo and biography
If you have spoken for TiM before please check if we have a bio of you on our website. Please let us know if you would like us to update any of the information: https://www.torahinmotion.org

2. Payment:

You will receive an honourarium for your teaching.
You will be paid by USD cheque that will be mailed to you after your class(es)
Please provide us with your mailing address
If a wire transfer is required please sendL
Please send us your relevant banking information so we can wire money:
Beneficiary name:
Beneficiary address:
Beneficiary bank name:
Beneficiary bank address:
Beneficiary account number:
Bank swift code:
IBAN/ ABA routing number (corresponding number):
Payment currency:
For Israelis -Teudat Zehut:

3. Confirmation email:

Please confirm your receipt of this email, too.
Thank you again for your participation in this exciting program. We look forward to learning with you.

If you have any questions or concerns, do not hesitate to reach out. See you soon on Zoom! Best,
TiM Team

Speaker payment:

Document is here

The key to this spreadsheet is having in the lecture dates, so that anyone who looks can tell when he spoke(date and number of times) and the payment calculation and if and when he was paid.

Without that it is not really all that helpful. So the entire line needs to be filled in. I could tell you, but it is best if you look in the website and familiarize yourself with how to search and find this info.

Be careful, he spoke previously and was paid for that.

I suggest looking in TiM Torah to find this.

Processing a Donation

Donation CAD - cheque
Copy cheque & attached documents or notes and share with Bookkeeper
Find Donor in Civi
Create new Civi Account if Donor not found
Look under 'Contributions'
Click on 'Record Contribution'
Under Financial type, select 'Donation, Canada'
Under Total Amount Select 'CAD ($)' and then type in the amount
Under Source make a note re the donation such as 'Chq dated XXX' or 'Sponsorship Devar Torah XXX'
Do Not click the box to automatically email a receipt for this payment (make sure unchecked)
Record the Cheque Number
Save
Let Jay & Ilana know about the cheque - leave it in Jay's folder for them to pick up and for Ilana to deposit
Stamp the back of the cheque
Record cheque in TiM Canada Bank deposit book as 'Mobile deposit by Ilana'
Ensure Thank you note is sent in CIVI (bookkeeper will do receipt if needed)

Donation from Foundation CAD - cheque
Copy cheque & attached documents or notes and share with Bookkeeper
Find Donor in Civi (use the foundation name on the cheque)
Create new Civi Account if Donor not found
Look under 'Contributions'
Click on 'Record Contribution'
Under Financial type, select 'Donation From Foundations'
Under Total Amount Select 'CAD ($)' and then type in the amount
Under Source make a note re the donation such as '1st installment of 3', or who initiated the donation (if from private fund within fdtn)
Do Not click the box to automatically email a receipt for this payment (make sure unchecked)
Record the Cheque Number
Apply a Soft Credit to the actual donor - type in the last name and the donor should appear. If not, create an account for the donor (donor is the person that initiated the donation)
(it is unusual for a donor not to be in the system)
Let Jay & Ilana know about the cheque - leave it in Jay's folder for them to pick up and for Ilana to deposit online
Stamp the back of the cheque
Record cheque in TiM Canada Bank deposit book as 'Mobile deposit by Ilana'
Ensure Thank you note is sent in CIVI (bookkeeper will do receipt if needed)

Donation USD - cheque from a charitable fund
Copy cheque & attached documents or notes and share with Bookkeeper
Find Charitable Fund in Civi (use the foundation name on the cheque)
Create new Civi Account if Donor not found
Look under 'Contributions'
Click on 'Record Contribution'
Under Financial type, select 'Foundations, US'
Under Total Amount Select 'USD ($)' and then type in the amount
Under Source make a note re the donation such as '1st installment of 3', or who initiated the donation (if from private fund within fdtn)
<u>Do Not click the box</u> to automatically email a receipt for this payment (make sure unchecked)
Record the Cheque Number
Apply a Soft Credit to the actual donor - type in the last name and the donor should appear. If not, create an account for the donor (donor is the person that initiated the donation)
(it is unusual for a donor not to be in the system)
Let Jay & Ilana know about the cheque - leave it in Jay's folder for them to pick up and for Ilana to deposit
Ensure Thank you note is sent in CIVI (bookkeeper will do receipt if needed)

Donation USD - cheque
Copy cheque & attached documents or notes and share with Bookkeeper
Find donor in Civi
Create new Civi Account if Donor not found
Look under 'Contributions'
Click on 'Record Contribution'
Under Financial type, select 'Donations, US'
Under Total Amount Select 'USD ($)' and then type in the amount
Under Source make a note re the donation
<u>Click the box</u> to automatically email a receipt for this payment (make sure checked) -this will be their donation receipt
Record the Cheque Number
Let Jay & Ilana know about the cheque - leave it in Jay's folder for them to pick up and for Ilana to deposit
Ensure Thank you note is sent in CIVI (bookkeeper will do receipt if needed)

Thoughts about acknowledging donations to be discussed. (April 30, 2020)
1. Every donor needs to be thanked
2. in this case the Israel Koschitzky charitable fdtn made the donation, and the donors are the Koschitzky family who need to be thanked (they should have been given a soft credit, not sure if this was done)
3. Jay thanks most donors immediately when donations are received (quickly by email, but I'm sure that some fall through the cracks) -it does not have to all be on Jay, we just need a system
4. donations made online get an automatic thank you.
5. I know that CDN charitable receipts are tracked by the system, USD receipts go out immediately when donations are made by credit card, and if we trigger them (we should -we can discuss it's in procedures) when a personal USD cheque donation is entered into CIVI,
6. Foundations both in US and Canada should get a written acknowledgement, I don't know if this is happening (it seems like not from this request), I don't know how to track this in the system, we need to think about it, and make sure it happens.
7. What else could should we do to acknowledge donations (we probably need to stratify this by donation level)
8. Many donations are to sponsor divrei Torah and classes, those get acknowledged in the respective devar torah or class (we need to be sure we have a system for this, so we don't miss any)
-another job for a student is to put all the yahrzeits we have into a google calendar for that purpose (and I hope soon we can get fields for this in CIVI (have been requesting for a long time, and so far have not been able to get)
-I can send you the spreadsheet of donations for d'var torah sponsorships until end of March, we need to update for April

We should have a specific meeting to discuss donations. 2020-2021 were transformational for TiM in level of donations from US and in expanding the donor base, we need to think actively about this.

Confirmation of booking Info to Speaker:

Speaker name:
Program:
Name of class:
Date(s) of Class:
Time of Class:
Zoom Login (private, please do not share, anyone can register themselves for this class):

Please send us:

1. Recent photo (will be posted to the website)
2. Bio
3. Cell phone number to reach you before or during class if necessary
4. Best email address
5. Payment info

Please confirm payment method and currency (see details below of info we need for each option)

   i. Shekels wired to Israel
   ii. USD cheque mailed to US or international address
   iii. Canadian by e-transfer

We are looking forward to your participation in the eTim: Torah in Motion online Beit Midrash.

Zoom Information:
Now that most Torah learning occurs on Zoom, we know you are most likely accustomed to most of these guidelines. Please be sure to read these as they are special to Torah in Motion.

1. Login information:

(Please do not share this information. For security purposes, we require all participants to register through our website.)
Please click
or go to https://zoom.us/join
Meeting ID:
Password:

2. Timing:

The lecture will begin at **time specified above** . Please come on to Zoom **7-10 minutes early** so that we can ensure that your screen sharing is working properly and that there are no technical difficulties, as we start promptly.
You will be speaking for **1 hour**, leaving time for questions at the end.

3. Questions:

We recommend that you do not worry about answering the questions in the chat box until the end of the lecture, and answer all questions at the end of the hour.

4. Video/Audio Quality:

Please be sure to position your camera on your upper body; to ensure clear audio, please sit in a quiet space and/or use headphones with a microphone (if available to you), and make sure you are in a room with solid internet connection.

5. Recording:

All lectures will be recorded and posted on our website and YouTube shortly after they occur.

6. Publicity:

Please **spread the word** to your communities and congregations! We ask that you do publicize this to potential participants! The registration link is below: https://www.torahinmotion.org/programs/e-tim-parshat-shavua-5781-with-weekly-guest-speaker

7. Source Sheets:
If you have a source sheet or slide show ready in advance of your shiur, please send it in a response to this email so that we can make it available to participants.

8. Hebrew Phrases:
Please ensure that all technical Hebrew phrases are translated into English. Most of the people coming through us as native English speakers

Confirmation:

1. Bio and picture:

We have or will put a bio of you on our website. Please let us know if you would like us to update any of the information: https://www.torahinmotion.org/users/rabba-wendy-amsellem

2. Payment:
You will receive an honourarium of $150 for your teaching. Please send us your relevant banking information so we can wire money:
Beneficiary name:
Beneficiary address:
Beneficiary bank name:
Beneficiary bank address:
Beneficiary account number:
Bank swift code:
IBAN/ ABA routing number (corresponding number):
Payment currency:
Teudat Zehut (Israel):

Full mailing address:

3. Confirmation email:
Please confirm your receipt of this email, too.

Thank you again for your participation in this exciting program. We look forward to learning with you.

Attached is our program flyer for all current programs in our Fall series. We ask you to please share as you see fit. Thank you!

If you have any questions or concerns, do not hesitate to reach out.

See you soon on Zoom! Best

Info needed to create an Online e-TiM (electronic Torah in Motion) program:

Program name:
Program Date:
Program location: online

Names of speakers:

For each Speaker:

1. Recent photo (will be posted to the website)
2. Bio
3. Cell phone number to reach you before or during class if necessary
4. Best email address
5. Payment info

Topics/ Date/ Time: (Dates and times of every lecture in the program, class or series)

Please send me a list of upcoming programs with the following info:
Each program should be in a separate email with the subject name of program

Name of program:
Program Description:
Speaker:
Dates:

Day of week:
Number of classes in series:

Program Picture (we can choose these ourselves): LMK if paula should choose or me

Speaker bio:
Speaker picture:
Speaker email address:

Speaker Home City:
Method of payment for speaker:
In USA -USD cheque (confirm or get address)
In Israel -mail of USD cheque or wire transfer of shekels (confirm or get address or wire transfer info)
In Canada -etransfer or mail cheque (get preferred email address or street address)

Beneficiary name:
Beneficiary address:
Beneficiary bank name:
Beneficiary bank address:
Beneficiary account number:
Bank swift code:
IBAN/ ABA routing number (corresponding number):
Payment amount:
Payment currency:
For shekels to personal account in Israel need TZ

Creating a smart group

- In Civi, go to ‘Events’, and select ‘Manage Events’
- Find the event you want to make a smart group for, click ‘Participants’, and select ‘Registered, Attended, …’
- Select the circle that says ‘All X records’
- Select the dropdown menu next to where it says ‘Actions’
- Select ‘Group - Create smart group’
- In the ‘Name’ box, write the title in the following format: YYYY e-TiM: (shortened title of program)
- Select ‘Save Smart Group’
- Hover over ‘Contacts’ in the navigation bar and select ‘Manage Groups’
- Find the group you just created, and select ‘Settings’
- Select the box that says ’Mailing List’
- Select ‘Save’

Name: Year, Season, e-TiM, Shortened Title
Example: 2021 Summer e-TiM Mirvis Conversation

29. Sending a D’var Torah Sponsorship email from CIVI

1. Open CIVI
2. Go to that account of the donor and make sure that the recipient is allocated as a soft credit for this donation
-very important that we have email address of the donor and recipient
3. Go to the account of the recipient
Click on tab for activities
Click on Add new Activity
Click Send an email
Check and update from address (for dedication from address should be info@torahinmotion.org)
Add in any cc’s or bcc’s
please **bcc** to ilana@torahinmotion.org
Can bcc to yourself so that when you get it you will see what it looked like and that it went out.
please **cc** to the donor (so they are copied on the email and know that it went out)

4. Update the body of the email
First name of recipient should fill in automatically when the email goes out (if it is correctly entered on the CIVI summary page)
Please put in name of the person in who’s memory donation is being made
Please put in name of person who made the dedication

Here is an example of the body text:
Dear Debra,

Torah in Motion has received a generous donation in memory of your dear mother Mrs Joan Drescher z"l

In memory of a very kind and loving woman , a devoted and cherished Mother, Grandmother and Great Grandmother. She has left a wonderful legacy of love of Torah and yiddishkeit

Fondly,
Annie Garmaise.

5. Click send
30. D’var Torah Sponsorship

-confirm if Daf Yomi or Parsha
-Name of Sponsor
-In memory
or
in honour of:

Date of Occasion in English:
Date of occasion Hebrew:

Dedication:

Keep track of these on spreadsheet and make sure the appropriate D’var Torah goes out on the correct week.

Property Tax Rebate for Charities

City of Toronto Filing
Deadline: March 1

https://www.toronto.ca/services-payments/property-taxes-utilities/property-tax/property-tax-rebates-and-relief-programs/property-tax-rebate-for-registered-charities/

Need 4 documents:

You will need to submit the following documents to the City of Toronto

1) Completed and signed 2020 Property Tax Rebate form. (Landlord)
2) A copy of the applicant's current registration status document referencing the BN/Registration Number and Effective Date of Registration from Canada Revenue Agency (CRA).
3) A copy of the lease agreement.
4) A copy of a tax reconciliation statement from NOIK which specifies how the eligible property tax amount is determined. (landlord)

City of Toronto - **Joseph Castro** <Joseph.Castro@toronto.ca> or email to propertytax@toronto.ca

2019 information

Joseph Castro

Revenue Services | Property Tax Rebates

North York Civic Centre | 5100 Yonge St, Lower Level

Toronto, Ontario M2N 5V7

Office: (416) 395-1223

Email: Joseph.Castro@toronto.ca

Adding a YouTube video to program page

- Go to the program page
- Under ‘Edit’, scroll down to where it says ‘Program Videos with Dates’
- Select ‘Add Program Parts’
- Type the ‘Part Title’ as follows:
    - Title of Program Part in series
    - Example: Shir HaShirim Part 3
- Put in the date and time (actual date and time of the class) -this is necessary to ensure the videos appear in order
- Select ‘Add Media’ and choose correct YouTube file as follows:
    - Paste URL into ‘Add Video Link via URL’ bar
    - Select ‘Add’
    - Save the video to media library
    - Ensure the desired video is selected
    - Select ‘Insert Selected’
- Type the Speaker’s name into the ‘Speakers’ bar
- Select ‘Add Program Parts’ to add additional videos from other parts of the series
- Go in chronological order (top is the first part and bottom is the last part of the series)
- At the bottom of the page, select ‘Save’

- Speaker payments using shared google sheet

Resolved (this means they have been paid already and no further action is needed)
Last Name
Speaker
Questions and comments
Last date of series
Owed Amt
Paid Date
Total Number of classes in Series
$ per class
Payment method
Paid amount Approved by Jay
Chq #
Paid By
Series
Class Title
Day
Date
Time
Notes

1. the few speakers at the top are the ongoing ones who we have been paying every 10 sessions
2. It's very important to put in the weeks they taught on the right hand side (you can see these filled in for the paid speakers) -because this info can be double checked by Jay and goes onto their cheque stubs so that we can all stay in agreement about which weeks have been paid.
3. I believe the list of speakers is up to date, in that everyone who is currently booked, is reflected on the sheet, but for the new ones (at the bottom) all the details need to be entered eg, name of classes, number of weeks, dates of classes etc. -it would be great if you can do these and always good to double check with Jay if you are not sure.
-sometimes classes are cancelled for holidays or whatever, so it is very impt to keep on top of this., things do change occasionally, so just important to keep in touch about classes.
-this should be reflected in the website event calendar, but it will be good if you are monitoring this

Changes to Program Dates during a series (corrective actions):

classes on the website need to match exactly the reality of what is happening

1. participants need to be told this info (especially when there is a change)

2. The website has the classes posted by date -so this needs to be updated

3. -these appear in the calendar and effects the order of classes showing up on the homepage and the program page and the automatic numbering of classes
-so unless we correct the dates on the page a person checking would not have this info
-The number of classes in a series is automatically generated in the calendar and needs to correspond to the recordings

4. -tech support posts all classes so needs to know if there is no class (especially if it was previously scheduled)

5. the speaker payments are based on the number of classes in the series as posted on the website (always good to check with Jay to confirm) -so that the bookkeeper has the correct info, this would need to be corrected on the speaker payment sheet.

To fix this on the website someone needs to: first clarify if we are only missing this class or also adding an extra class, and then all the following need to be done
a. change the dates of the class that appear on the homepage and on the program page
b. actually remove this date of class, from the inputted list of all the classes
c. notify all the participants by email of this change

Remove participant from email list

Find email address in CIVI
In subscriber preferences check the boxes for:
Do not phone
Do not email
Do not mail
Do not sms
Do not trade
No Bulk Emails (User Opt Out)

In notes (section of user account) make a note:
User opt out
Date of request

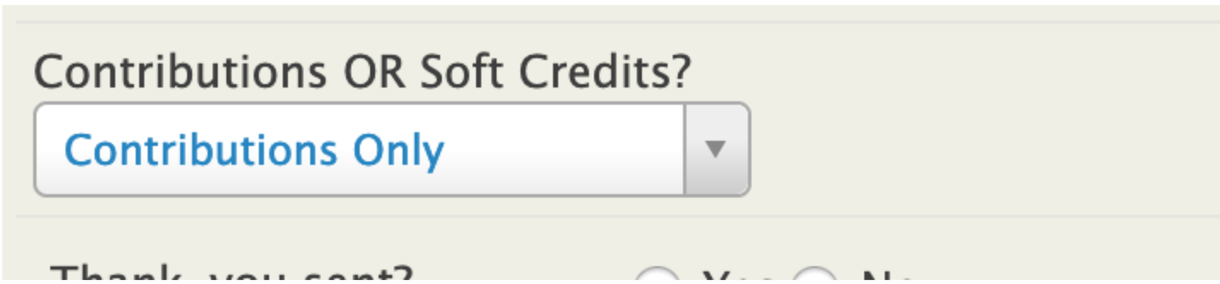
Creating contribution spreadsheet from CIVI

Do this search:

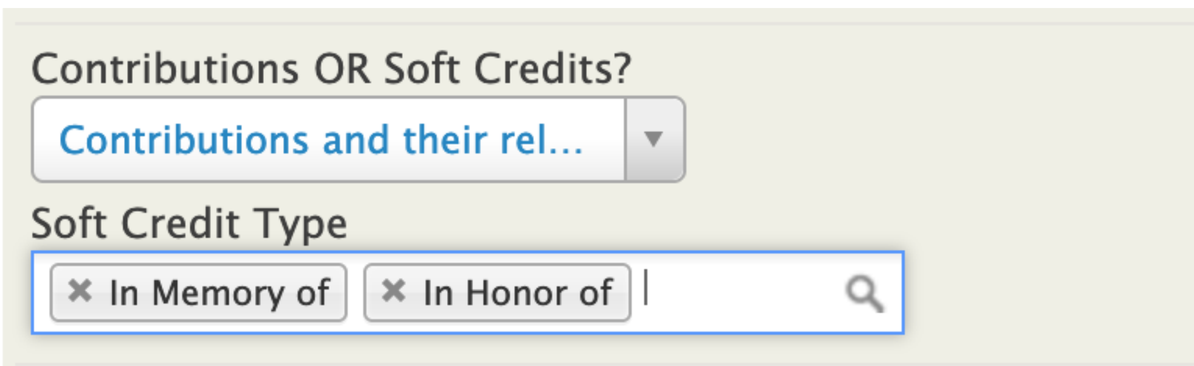
search/
find contributions/

Change to contributions and soft credits.

From this:



to this



Then do report

Speaker Guideline Emails

Format for sending Zoom guidelines for speaker in America/Canada: (Put in **11pt Arial**)

Dear Speaker,

We are looking forward to your class on Day Month Time.

Below are some speaker guidelines. Please confirm you have read them by replying to all.

Please complete the following information for our records and return to info@torahinmotion.org ASAP:

Your mailing address: ____

Your phone number (s) ____

What is the best way to contact you if necessary, immediately? ________________ (cell phone number) -eg. should there be a technical difficulty during the class.

Bio and picture:
Please forward an updated bio and picture.

I confirm that I have read the
Speaker Information for Zoom Classes (Below)

confirmed YES:_________________ No:____________________

Login information:
Please click:
Insert Link
Meeting ID: 518 356 1136
Passcode: Summer

Please do not share this information. For security purposes, we require all participants to register through our website (Add Registration Link)

Timing:
The lecture will begin at **Time Eastern**. Please come on to Zoom **5-7 minutes early** so that we can ensure that your screen sharing is working properly and that there are no technical difficulties, as we start promptly.
You should speak for approximately **1 hour**, leaving time for questions at the end.

Questions:
We recommend that you do not worry about answering the questions in the chat box until the end of the lecture, and answer all questions at the end of the hour. At the same time if you prefer to periodically answer the questions that is fine, too.

Video/Audio Quality:
Please be sure to position your camera on your upper body; to ensure clear audio, please sit in a quiet space and/or use headphones with a microphone (if available to you), and make sure you are in a room with solid internet connection.

Recording:
All lectures will be recorded and posted on our website and YouTube shortly after they occur.

Publicity:
Please **spread the word** to your communities and congregations! We ask that you do publicize this to potential participants! The link for the Class program page is here(link).

Source Sheets:
If you have a source sheet or slide show ready in advance of your shiur, please send it in a response to this email so that we can post it and make it available to participants.

Hebrew Phrases and Level:
Please ensure that all Hebrew phrases are translated into English. Most of the people coming are native English speakers and some participants have weak Hebrew backgrounds. At the same time, Torah in Motion classes are to be given on a high level - sophisticated, nuanced, intellectually stimulating - and not afraid to address complex and controversial issues. People come to TiM for more advanced classes.

Payment:
You will receive an honorarium of $150 for your teaching.

If you have any questions or concerns, do not hesitate to reach out.

info@torahinmotion.org

Thank you again for your participation in Torah in Motion e-TiM Beit Midrash. We look forward to learning with you. See you soon on Zoom!

All the best,
TiM Team

Dates and Donations

To get all the information necessary, you may need to send out a survey to past donors. You can do this through the website by going to Drupal under Content and clicking the option called Webforms.

For every entry in Hebcal we need all of this: 1. First name, 2. Last name 3. Name of deceased 4. Relationship to deceased (is this their father, mother, etc.) 5. Hebrew date of yahrzeit (or English date of Yahrzeit)

How to Unsubscribe a contact -ie stop them getting emails.

In CIVI account, in manage communication preferences

check off no bulk emails under privacy.

(user opt out)

-this means they will never get an email from TiM again

You can also remove them from groups

-if the person has no interest in TiM they should be unsubscribed altogether.

-if they are interested in TIM but do not wish to get all the emails eg a traveller, etc

-they should just be removed from the TiM General Interest group (this will eliminate most emails for them)

Adding a Divrei Torah/Parsha Shiur to Website

Step 1: Hover over “Content” “Add Content” and click “Divrei Torah”

Step 2: Add Title and Body

Step 3: Choose Blog Category:

- Parsha goes under Parsha Thoughts, Daf Yomi goes under Thoughts from the Daf, etc

Step 4: Choose more specific category (if it applies)

- If it goes under Parsha, click which Parsha it is from the dropdown menu.

Step 5: Check Published and Save

Make sure it looks right on the website!