

Guide to Updating Section Leadership and Staff Lists

As Section boards are transitioning this spring, it's time to send NCJW National contact information for your incoming and ongoing Section board and current staff to update our records and ensure all NCJW leaders receive our communications. Please see the instructions below on how to submit your Section leadership contact list to National.

Please submit the list of Section leadership including all Section board members and staff using the attached [Excel spreadsheet template](#). Since leaders receive access to resources and training opportunities that are applicable to the work of committees and project leaders, we encourage you to also include any committee/ project chairs and members as well as emerging leaders on your list who are not on your board. See below for more details on the National communications leaders receive.

This is the same template that was used last year with a couple new features. There are examples in the template spreadsheet to show you how National would like the list to be formatted as well as drop down menus for responses where appropriate.

The list is due by Monday, May 10, 2021. Please send to action@ncjw.org with the subject line “[Section Name] Section Leadership List FY22.”

Here is National’s timeline and process to transition to new leadership email distribution lists:

- April - May: National will continue to email FY21’s Section leaders as we collect updated Section lists. Sections are encouraged to forward leadership communications to your incoming boards.
- Late May/ Early June: National will upload the new Section leadership and staff lists. We will email both FY21 and FY22 Section leadership through mid-July.
- Middle of July: National will only email FY22 Section leadership.

Section leaders will receive the following emails from National:

- All individuals on the leadership and staff list will receive all NCJW emails, including the Monthly Leadership Newsletter, Weekly Wrap-Ups,

- NCJWebinar invitations, and action alerts. Individuals can change their email subscription and unsubscribe if they choose.
- National encourages all Section leaders to stay subscribed to the emails in order to receive important updates, resources, and access to leadership development opportunities.
 - Most of the emails National sends will go to all Section leadership. When an email is sent via Outlook, a footer will be included to note the recipients. The leadership categories collected on this spreadsheet will be used when we have specific communications for relevant roles.

Instructions

1. Download the Excel spreadsheet template to your computer. Save the spreadsheet file with your Section name. Example: "Austin Section Leadership and Staff List FY22"
2. Delete the examples included.
3. In row 2 of the spreadsheet, please list the general contact information for the Section, including mailing address, general email and phone number, website, and social media information.
 - a. In cell "2K", please specify if any of the general contact information has changed in the past 12 months, and if so specify what changed (ex: address, phone, email). This information will be used to update the [NCJW Near Your webpage](#) and the Directory of Leaders.
 - b. In cell 2L, please list the mailing address for checks and financial documents, if it is different from your section mailing address already listed.
4. Beginning in row 5, list one leader per row in the spreadsheet.
5. In column I and J, "Select leadership role," and "Select Secondary Leadership Role" choose which of National's leadership contact lists this leader should be on from a drop-down menu in each data cell.
 - a. The roles are: President/Presidium, Advocacy/Education, Back to School Store, Communications, Community Service, Finance/Treasurer, Fundraising, Israel, Membership/Engagement, Programming, Thrift Store, and Section Staff.
 - b. If none of these roles are relevant, please leave the field blank.
 - c. **Excel tip:** Click the data cell and an arrow pointing down will appear. Click the arrow to access the drop-down menu. You will not be able to type in this field since it is a drop-down menu.

- d. National will use this information for contact lists to communicate with specific leadership roles when needed. Most email communications will send to all Section leaders.
6. In column K, you will designate the recipient of National Partnership Dues and Financial Documents. Include at least one contact and up to two. Mark yes in the row for the one or two individuals you select.
7. In columns L and M, you will designate the recipients of the Weekly New Contacts Report and Weekly Online Donations report. You can designate as many recipients as you'd like.
 - a. The Weekly New Contact Report shares the contact information for new individuals who join National's database by taking an online action on ncjw.org. This is an opportunity for outreach to grow your Section. [Read the FAQ.](#)
 - i. ***Please note: We will be updating recipient lists based on this column alone. Anyone currently receiving the report who should continue to do so should be designated in this column.***
 - b. The Weekly Online Donations Report shares the information for all online donations your Section has received during the past week through National's website. [Read the FAQ.](#)
 - i. As above, anyone currently receiving this report who wishes to continue should be designated in the corresponding column.
8. Double check that names, phone numbers, and emails are correct and that each data cell is completed.
9. Send your spreadsheet as an email attachment to action@ncjw.org with the subject line "[Section Name] Leadership List FY22."

Questions?

Contact action@ncjw.org.