

1. Event Planning with Intention

Havurah's mission is to provide a vibrant, diverse, participatory Jewish community steeped in Jewish values promoting spirituality, learning, and acts of social responsibility.

GOALS

What are the goals of the activity? How do they relate to Havurah's mission (above)? What will the Havurah community gain from planning, implementing and taking part in the activity? Which governance cluster(s) below does the activity fit with? Are there opportunities to involve more than one?

- Kehillah: Community & Culture
- Avodah: Spiritual Life & Religious Practice
- Limud: Education & Life Long Learning
- Tikkun Olam: Social Justice
- Makom: Building and Space
- Hadracha: Leadership & Governance, including fostering confidence/empowering *vis a vis* Judaism or Jewish life

Can your activity be connected to Havurah's annual theme? For instance, in 2018-19, the theme was Panim el Panim, Encountering Each Other, which has prompted organizers and participants to focus on the ways we see each other in order to deepen our connections.

BALANCE

- It is important to look at the big picture when planning an activity. Choose a date that will not conflict with other events, and look at the whole month's calendar to see if it is already saturated with many activities. If it is, please consider scheduling further out.
- If your activity is very similar to another one being planned, there may be an opportunity for you to combine your events or otherwise collaborate.
- Remember that staff can help with certain elements of your event, but their bandwidth is limited, especially when many activities take place close together. Be in touch with the Program Director to discuss what you need from staff.
- Finally, be mindful that advance notice allows more people to attend events, gives you and your team time to plan thoughtfully, and allows staff to help ensure your best experience.

IMPLEMENTATION

Use the *Worksheet for Planning an Activity at Havurah Shalom* to plan the following:
Who will make the event happen? • Promotions • Facilities • Financial Matters • Food and Drink • Volunteers

REFLECTION

You may wish to survey participants and have a debrief with other organizers to aid reflection and to improve future activities. Take notes and give them to the Program Director to keep for others to learn from. Questions to consider afterward:

- Why did people attend the activity? What were they looking for?
- What was revealed/discovered/learned?
- Why is this important for Havurah's mission?
- What implications does it have in terms of directing our resources in the future?

2. Staff Roles

Program Director: Adela Basayne

Responsibilities

- Schedules, promotes, and plans events for families with young children
- With CMC, plans some holiday celebrations and coordinates with committees and other staff to ensure plans are in place, and roles and responsibilities are understood, including overseeing recruitment of logistics leaders
- Takes a big-picture view of events at Havurah to help everything run smoothly

Contact Adela when:

- You are in the beginning stages of planning an event
- You want help with planning or help from staff
- You would like planning documentation from previous years' versions of your event
- You would like to connect with others to make your event happen

Office and Facilities Manager: Rachel Pollak

Responsibilities

- Updates Havurah calendar and website
- Manages caterers, child care and janitors
- Handles reimbursement requests, processes payments and invoices
- Coordinates in-house printing needs
- Oversees facilities arrangements such as room reservations and janitorial set-up
- Provides support for audio-visual needs, safety and security

Contact Rachel when:

- You have questions about the building, our audio-visual equipment, or our safety policies
- You want to know if your preferred date will work
- You need to arrange for child care or catering
- You'd like to use the office printer/copier for an event
- You need to be reimbursed or have a vendor paid
- You would like your event space to be set up in a particular way by the janitors

Communications and Membership Coordinator: Brad Pector

Responsibilities

- Produces publications (print, online, email)
- Updates Havurah calendar and website
- Helps connect members to their affiliation groups and committees of interest
- Helps recruit members as volunteers for programs, projects, and committees
- Staff liaison to all committees in the Kehillah cluster

Contact the CMC when:

- You need to promote your event
- You would like to access RSVPs to your event
- You need help recruiting volunteers and fellow planners

3. Promoting Your Event to the Community

Havurah Shalom has a number of promotional venues for your event:

- **Weekly Community E-mail**

Includes briefs about upcoming community events and news. Comes out every Wednesday afternoon. Submission deadline is noon the previous day. Submit copy via the online form.

- **Online Calendar**

Your event on the calendar acts as (1) a reservation for the time and date, (2) a handy way for others to learn about your event, (3) the location for RSVPs to be made, if you are requesting them. Contact Rachel Pollak early on in your planning process.

- **Bi-weekly For Your Family E-mail**

Events and news especially for families with children ages 0 to 18.

- **Monthly Hakol Newsletter**

A print publication with committee updates, save the dates, and columns from Havurah leadership. The deadline is the second Tuesday of the month. Produced by the Community and Membership Coordinator.

- **Facebook**

Members of the group may post their own content in this moderated community.

- **Bulletin Boards in the Building**

If you choose to make a flyer, it can be displayed on bulletin boards in the foyer.

Submitting News and Events

Visit www.havurahshalom.org/member-news for submission forms and guidelines.

Providing Copy for Publicity

The shape of your publicity should always be informed by the guidelines of the promotion venue. For instance, event descriptions for the Community Email may be no more than 125 words, while Hakol allows for about 400 (if needs must).

Any promotional description should include: title of event, date(s), time(s), location, phone or email of main contact, cost, how to RSVP, whether there is food or child care, and a blurb with only the most important and enticing information to help readers decide if this is for them. This copy is for event planners to compose; staff are not able to write it for you.

Staff

The Communications and Membership Coordinator is responsible for all of Havurah's promotional venues.

RSVPs

To collect RSVPs via the Havurah website, let the OFM or CMC know, and they will set it up. You will also be given access to view the RSVPs by selecting the "View Registrations" link on the event page. This link will only appear when you are logged in. Check these regularly to help with decisions about further promotion, the amount of food or copies needed, etc.

4. Facilities

The person in charge of facilities arrangements should connect with the Office and Facilities Manager to reserve a space and discuss how the building will be used for the activity. Together, they will discuss the following:

Opening and Closing the Building: All entry/exit doors at Havurah must remain closed and locked at all times for safety. The building is also alarmed when not in use. Because of this, members should know the door code to enter, and the first person to enter the building in the morning must know the entry code and the alarm code. The last person out must be able to set the alarm before leaving. Ask a staff member for the instructions and codes. Do not share codes with non-members, even vendors such as caterers or delivery people.

Set-Up: The janitors will have tables and chairs set up, but a team of three or four people should arrive early to lay down tablecloths, hang signs, put out supplies and food, or do anything else that needs to be done before attendees arrive.

Tables and Chairs: Havurah has 18 round tables that seat 8 people, and 13 rectangular tables that seat 8. These can be arranged ahead of time by the janitors for your event. Advance notice is needed.

Clean-Up: It is usually best not to rely on the same people for both set-up and clean-up. This team will collect trash from all spaces, wash dirty dishes, run them through the sanitizer and put them away, clean surfaces in the kitchen, and ensure the space is picked up and reasonably clean. Tables, chairs, and deep-cleaning can be left for the janitors. This is an area of activity planning that has historically been problematic at Havurah, so **it is important for activity planners to line up the tidy-up team in advance of the event.**

Signage and Copies: Have someone responsible for nametags, posted signage, and copies of handouts. These can be made in coordination with the office or offsite at a print shop. The Havurah office as a rule needs 24-hour notice to print materials, so please don't plan to take care of this piece on the fly.

Trash and Recycling: You can find instructions for recycling common materials in the kitchen. We also have a compost container in the kitchen. If it gets full, it should be tied off and dropped into the bin in the garbage room. If your event will generate a lot of trash, check in with the OFM for tips on how to manage it.

Storage and Deliveries: If you have a large event with supplies that need to be stored beforehand, confer with the OFM on where they can go. If items will be delivered to Havurah, a volunteer may be needed to receive them, depending on the office schedule. It is best to involve the OFM in this scheduling.

Safety/Security: At least one person should be recently trained in Havurah's safety and security policies to ensure they are adhered to properly. Portable panic buttons should be worn by organizers and passed from one greeter shift to the next. Designate someone to connect with the Office and Facilities Manager for a 15-minute training and to take responsibility for safety at the activity.

Audio/Visual Equipment: Havurah has two projectors, one projector screen, assisted listening devices, a sound system with speakers and microphones, a portable speaker, and a system for recording and streaming videos from the Sanctuary. We also have a TV and DVD player on a portable stand. An AV manual is available as a reference, and the OFM is available for one-on-one training.

Child Care: Child care makes an event accessible to parents who might not otherwise be able to come. There is a budget for hiring child care providers for Havurah events. Contact the OFM if you would like her to schedule a provider for you. If you will be hiring providers on your own, be sure to submit a check request to the OFM to cover the cost.

Emergencies: The OFM is the building contact for emergencies. Call her for help with facilities issues such as plumbing or electricity, or if someone accidentally sets off the alarm. For medical emergencies, of course, call 911.

5. Financial Matters

If your event will generate income or result in expenses, it is best to sit down and make a budget. Determine what the costs and income expectations are, then have a conversation with your committee head or Cluster lead to make sure funds are available in Havurah's budget to cover your event. If you're not sure how to get started on this process, the OFM can help connect you to the right people, or you can contact the Treasurer, Shari Raider.

Paying for Things

It is best to decide ahead of time how to pay for expected expenses. Here are the options:

- To pay expenses out of pocket and get reimbursed, keep your receipts and attach them to a reimbursement form (available online or from the OFM).
- To have Havurah pay for something in advance, contact the OFM about having a check written or ask her to use a Havurah credit card.
- If a vendor's policy is to invoice us, then have it directed to the OFM.

Collecting Money

Events may collect money in many ways, such as through ticket sales, donations, meal costs, etc. This can be done electronically through a form on our website, but we are also able to accept checks and cash. Regardless of how funds are collected, this aspect of the event needs to be discussed first with the OFM so that we can account for it properly in our bookkeeping. Please plan to have this conversation early on in your planning process.

6. Food and Drink

Planning

A dedicated team of people should be focused on planning the activity's food and drink needs, if any. Decide how much food is needed, where it will come from (potluck, bought by organizers, catering, delivery, etc.), and how it will be distributed to attendees.

If food will be dropped off ahead of time, coordinate with the Office and Facilities Manager to ensure its receipt and storage. Have a plan for leftovers, which are subject to kitchen policies, and be aware of trash, recycling and composting policies.

During the Event

During the activity, this team would be in charge of putting out the food, dishes, silverware, napkins, etc., keeping spaces clean, and making sure gluten-, nut- and dairy-free food is labeled, as well as cleaning up the kitchen afterward. During a potluck, someone should be responsible for directing people to the food drop-off point.

Alcohol

Alcohol is generally permitted at Havurah events as long as it is strictly separated from other beverages, such as at its own table, and labeled. It is illegal to serve alcohol to a person younger than 21, even if a parent is the one serving it. (Sacramental wine during a religious observance is an exception.) In certain circumstances, a liquor license may be needed. If you have questions about alcohol at your event, contact the Office and Facilities Manager. For planning purposes, if you will have alcohol at your activity, it is good to put someone in charge of that piece.

Catering

Caterer hiring, scheduling and invoicing is now done through the Office and Facilities Manager. Rather than hire your caterer directly, please fill out the Catering Request Form (online or on paper) to have the OFM contact and schedule your preferred caterer. You will still be responsible for working with the caterer on a menu and managing them before and during your event. This new system is meant to simplify things for event planners and allow for consistent oversight of caterer invoicing. (This policy does not apply to people renting the building for their own use, such as b'nai mitzvah; it is only for Havurah-sponsored events.)

Dietary and Cooking Restrictions

The Havurah building is entirely vegetarian (with kosher types of fish allowed). A list of permissible seafood is available. Baked goods may not contain lard. Additionally, frying is not permitted in the kitchen.

7. Volunteers

Ideally, one or more person will be responsible for each piece of your event (e.g. greeters, food, print needs, set-up, clean-up, etc.). In addition, two to three people should be in charge of the bigger picture.



By splitting up tasks and responsibilities, pieces are less likely to get lost or minimized, and everyone involved can put 100 percent into what they signed up to do. Here are common areas where volunteers make a difference:

Common Volunteer Areas

Publicity: See the Promotions section for more on how to do publicity.

Emcee: Knows the flow of the event and provides guidance for attendees, ensuring different parts of the program begin on time.

Photography: Document your event visually and publicize the photos afterward so everyone can see what a great time was had.

Set-up: Tables and chairs will be arranged already, but if you need to set out tablecloths, nametags, food, other supplies, etc., then a team of 3 or 4 people is recommended.

Clean-up: This often gets neglected, resulting in a few people staying late to clean up without help.

Greeters: With the entrance always closed and locked, greeters are an essential part of any event. Their job is to open the door and welcome people, usually in 20-minute shifts. Use an online service such as SignUp.com or SignUpGenius to fill these slots. OFM or CMC can help set this up.

Food and Drink: See the Food and Drink section for more on this.

Leads and the Bigger Picture

Focusing on the bigger picture involves asking questions found in the Event Planning with Intention section; connecting with the Program Director; recruiting volunteers and supporting them where needed; making a budget and arranging financial matters; reserving the space and coordinating with the OFM on facilities logistics; and making sure communication in and outside your group is steady. If this is a recurring event, there may be notes from previous years that the leads can look at. The leads should also turn in their notes to the Program Director for others to use.

Recruiting Volunteers

For support in recruiting volunteers, be in touch with the Program Director. It is also possible to send an email to everyone who has RSVPed for the event, asking for volunteers.