

## Worksheet for Planning an Activity at Havurah Shalom

Planning an activity at Havurah can involve a lot of details! To ensure nothing is overlooked in the process, this planning sheet lists the various areas to think about when planning an event. It does not need to be turned in to anyone, but rather kept at hand as a reference.

### Big Picture

What is the goal of the activity and how does it relate to Havurah's mission statement: *to provide a vibrant, diverse, participatory Jewish community steeped in Jewish values promoting spirituality, learning, and acts of social responsibility?*

x \_\_\_\_\_

Which Governance Cluster and Committee is responsible for organizing the activity?

Kehillah (Community) / Avodah (Spirituality) / Limud (Learning)  
Tikkun Olam (Social Action) / Hadracha (Governance) / Makom (Place)

Committee/Workgroup: \_\_\_\_\_

If costs will be associated with the activity, have they been planned for in the congregational budget? If not, how will expenses be paid?

### Organizers

Who is responsible for planning the following pieces?

- Planning Team Leaders \_\_\_\_\_
- Budget \_\_\_\_\_
- Promotions \_\_\_\_\_
- Facility Arrangements \_\_\_\_\_
- Safety/Security \_\_\_\_\_
- Set-up \_\_\_\_\_
- Clean-up \_\_\_\_\_
- Greeters \_\_\_\_\_
- Food and Drink \_\_\_\_\_
- Host/Hostess and/or Emcee \_\_\_\_\_
- Photographer \_\_\_\_\_
- Signage and Copies \_\_\_\_\_

## Checklist for Planning and Activity at Havurah SHalom

### *Be in Touch with Staff*

- Reach out to the Program Director, Adela Basayne, to put your activity on her radar, collaborate on programming and discuss general staff support needs
- Ask Adela for documentation from previous years if this is a recurring event
- If this event is for a holiday, contact Rabbi Benjamin, Education Director Deborah Eisenbach-Budner, or Adela to ensure maximum coordination

### *Calendar and Promotions*

- Check the calendar for availability and to be sure other events are not scheduled too closely to your date
- Ask Rachel Pollak, the Office and Facilities Manager, to check your preferred date and have it placed on the calendar along with a description
- Fill out the online forms to promote your event in the weekly email or Hakol (managed by Communications and Membership Coordinator Brad Pector; use the Submit button on the website header to find the forms and submission deadlines/guidelines)
- If your activity will be open to kids, teens or young families, contact Brad about having it featured in the For Your Family email
- Create a flier (optional)
- If printed materials are needed, arrange with Rachel well ahead of time to print them in the office or have them printed at Documart or Fedex

### *Facilities*

- Tell Rachel which rooms you'll use and how you would like the tables and chairs arranged; if the set-up needs are complicated, meet with Rachel to go over the details
- If you will be using the sound system, projector, or other audio/visual tech, be in touch with Rachel for the manual and to be trained, if needed
- Familiarize yourself with the Havurah Security Plan and be prepared to abide by and enforce its policies and procedures
- Familiarize yourself with Havurah's trash and recycling policies and create a plan for abiding by them
- If storage is needed in the kitchen or elsewhere before or after the activity, tell Rachel
- Learn how to open the main entrance and turn the alarm on and off

### *Vendors and Child Care*

- If you will be offering child care, decide whether you will hire the provider(s) or if Rachel should
- Determine how child care will be paid for (which Havurah budget lines will be used)
- If the activity is catered, give Rachel the information she needs to hire and schedule the caterer; do not hire the caterer yourself
- Remind team members that the door and alarm codes are for members only, not vendors

- If expecting deliveries to and from the building, coordinate with Rachel to ensure someone is there to meet them
- Decide ahead of time how to pay for vendors and supplies (e.g. ahead of time through office or ask for personal reimbursement)

#### *RSVPs*

- If you will be collecting RSVPs, tell Rachel or Brad when requesting the calendar entry and let them know who should have access to the online RSVP list
- Learn how to check RSVPs and get help from Rachel or Brad if needed
- Check RSVPs regularly

#### *Food and Drinks*

- Recruit a team to arrange food, drinks, cups, plates, etc. at a table and keep food spaces neat during the event
- If the activity is a potluck, have someone to direct people to the food drop-off point
- Ensure gluten-, nut- and dairy-free food is labeled and kept apart
- If children are present, have someone oversee the table
- If alcohol is served, ensure it is separate and well-distinguished from other beverages and that children have no access to it. (It is a crime to serve alcohol to people under 21.)
- If you have questions about serving alcohol, contact Rachel

#### *Greeters*

- Recruit people to take shifts opening the main entrance doors and welcoming people during the activity

#### *Set-Up*

- Recruit a team to arrive before the activity to set up the space (tables and chairs will be pre-arranged by janitors)

#### *Clean-Up*

- Recruit a team to stay after the event to clean up
- Collect all trash from chairs, tables, floors, bathrooms, kitchen
- Wash dirty dishes and run them through sanitizer
- Clean surfaces in the kitchen
- Dispose of trash, recyclables and compostable food according to kitchen signage
- Leave tables and chairs for janitors to reset

#### *Post-Activity Follow-up*

- If it would be helpful, survey participants and organizers for feedback
- Debrief with your team to learn what worked and how to improve in the future
- If it was a recurring activity, provide notes to Adela to help next year's organizers
- Reflect on why people attended the activity and what they got out of it
- Reflect on how the activity was important to Havurah's mission