

# Operations Manual

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# Chabad House Event Planning Checklist

This is a brief checklist of steps to planning a successful event. Please review the High Holiday Checklist as well as the Life Cycle Events Checklist for specific detail.

## 4 MONTHS PRIOR TO EVENT:

- Determine the purpose of the event.
- Determine size, scope, title of event.
- Determine your sponsors/co-sponsors and invitees.
- Check Chabad House master calendar for available dates and reserve date.
- Contact speakers and/or participants to determine availability.
- Identify intended audience and ensure mailing lists are up to date/accurate.

## 2 MONTHS PRIOR TO EVENT

- Confirm speakers and participants. Discuss time, date, and place, as well as dietary requirements, type of travel, payment, and technical needs.
- Determine event budget and secure funding sources.
- Establish a publicity plan for the event. Create print materials including invitations, brochures, posters, etc.
- Send invitations and announce event.
- Confirm caterer.
- Confirm volunteers.

## 6 WEEKS PRIOR TO EVENT

- Determine decorations.
- Book travel arrangements and communicate travel reimbursement guidelines to special guests.
- Reserve AV/equipment requirements.

- Confirm babysitters if applicable.

## TWO WEEKS PRIOR TO EVENT:

- Distribute posters and/or flyers.
- Send reminder email to invitees.
- Discuss event logistics with staff.
- Ensure all payments/fees have been collected.
- Finalize catering arrangements.
- Check in with speakers and/or special guest to confirm travel arrangements and event details.

## 3 - 5 DAYS PRIOR TO EVENT:

- Confirm number of attendees with caterer.
- Confirm all housekeeping requests.
- Ensure "day of signage" (directional signs/door signs) is printed and ready.

## DAY PRIOR TO EVENT:

- Send a final email reminder to invitees.
- Purchase food, drinks, ice, tablecloths, utensils, etc. not supplied by caterer or client.
- Print/copy nametags and other materials as needed.
- Decorate

## DAY OF EVENT:

- Check room to make sure it is clean and holds the necessary equipment and furniture. Confirm room set up.
- Meet caterer.
- Place water at the podium for each speaker.
- Set-up name tags and/or distribute programs.

**ONE WEEK FOLLOWING EVENT:**

- Send appropriate thank-you notes.
- Pay vendors.
- Compile a list of all expenses incurred for the event. Debrief with planning team. Discuss and document possible improvements in the process.
- Document all event details so that future groups may benefit from your experience.

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## Use of Building Contract and Fees For Bar-Bat Mitzvahs, Weddings, and other Life Cycle Events

Date Booked: \_\_\_\_\_ Event Day: \_\_\_\_\_ Event Date: \_\_\_\_\_

Event Name: \_\_\_\_\_ Expected Attendance: \_\_\_\_\_

Event Time: \_\_\_\_\_ Arrival Time: \_\_\_\_\_

Host: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone No: \_\_\_\_\_ Email Address: \_\_\_\_\_

***Please see attached form for Use of Building Guidelines***

**RENTAL FEES:**

**Payment Received**

(Indicate N/A if not applicable)

Non refundable deposit	\$ 50.00		\$ _____
Social Hall (Half)	\$200.00		\$ _____
Social Hall (Full)	\$300.00		\$ _____
Lounge	\$150.00		\$ _____
Board Room	N/C		
Table Clothes/ea(floor length)	\$ 10.00	X Quantity: _____	\$ _____
Table Clothes/ea(mid length)	\$ 6.00	X Quantity: _____	\$ _____
Kitchen: (day of event included in fee)			
Additional Day - Fee/day	\$ 75.00	X No. of days: _____	\$ _____

***Please see attached form for kitchen guidelines***

**CLEANING FEES:**

Cleaning fees include setup and teardown, vacuuming, and mopping. You are responsible for clearing off all tables and removing large garbage from the building. Cleaning fees will be charged for all events.

Social Hall (Half)	\$ 150.00	\$ _____
Social Hall (Full)	\$ 300.00	\$ _____
Lounge	\$ 20.00	\$ _____
Library	\$ 20.00	\$ _____



Cleaning dishes \$ 50.00 \$ \_\_\_\_\_

**ADDITIONAL FEES:**

Popcorn Machine \$ 20.00 \$ \_\_\_\_\_

Cotton Candy Machine \$ 20.00 \$ \_\_\_\_\_

Professional Security \$150.00 \$ \_\_\_\_\_

Childcare – Fee/sitter/hour \$ 20.00 x No of hrs: \_\_\_\_\_ \$ \_\_\_\_\_

**Total Fees to be collected:** \$ \_\_\_\_\_

**FEES INCLUDED:**

Tables/Chairs - Please indicate quantity needed:

Round tables \_\_\_\_\_ Rectangular tables \_\_\_\_\_ Chairs \_\_\_\_\_

Dishes – Meat dishes and silverware for up to 200 places. Please indicate quantity needed:

Dishes: \_\_\_\_\_ settings Silverware \_\_\_\_\_ settings

Audio Visual

Microphone, basic sound system, screen and projector are all included in rental fee. Please indicate which you would like available to you. It is recommended that you make an appointment with the Chabad House Director to review the equipment prior to your event.

\_\_\_\_\_ Microphone \_\_\_\_\_ Basic sound system \_\_\_\_\_ Screen \_\_\_\_\_ Projector

Mashgiach (Payable to the Mashgiach

Dairy Event \$12.00 per hour, payable to the Mashgiach

Meat Event \$10.00 per hour, payable to the Mashgiach

Signature:

\_\_\_\_\_  
Host

\_\_\_\_\_  
Date

\_\_\_\_\_  
Chabad Representative Date

Chabad House  
Rabbi (In-charge)

**Function**

Rabbi \_\_\_\_\_ serves as the liaison between the Chabad House and the community. He actively seeks fundraising opportunities by cultivating meaningful relationships within the community and maintaining existing relationships.

**Reports to:**

Rabbi \_\_\_\_\_ is ultimately responsible to the community of the Chabad House.

**Responsibilities**

Community

- Represent the Chabad House in the community
- Build participation within the community
- Actively participates in the greater Birmingham area religious community
- Ministering to the elderly and sick/counseling
- Provide pastoral care, visits and calls

Religious Services and Other Events

- Tailor religious services to meet the needs of the congregants and participants of the particular service
- Lead Shabbat evening and morning services
- Provide spiritual inspiration and growth

Marketing

- Play an active role in the development and supervision of fund raising activities, including annual, event-oriented, endowment and capital campaigns. This includes meetings, dealing with consultants, solicitation and follow up.
- Provides initial contact with prospective and new participants, ensures prompt and detailed information on services, programs and dues structure.



Chabad House Office Manager  
Office Manager

**Function**

The Chabad House Office Manager provides the day-to-day administrative support for the Chabad House and Preschool.

**Reports to:**

The Chabad House Office Manager reports to the Chabad House Director

**Responsibilities**

General Office Support

- Meet and greet any one who walks into the Chabad House
- Answer all phone calls, return phone messages left on main voicemail and responds to all emails
- Provide computer support for forms, mailings, flyers, etc.
- Maintain accurate mailing lists and print all labels for mailings
- Maintain general paperwork for Chabad House
- Provide regular reports as needed (ie: donations)
- Mailing of all printed materials

Record Keeping(Monday, Wednesday, Friday)

- Deposit all funds and payments received from invoices
- Send regular billings to members and others
- Donations - Collect all donations, keep accurate records, make all deposits and send personalized thank you notes in a timely manner.
- Process credit card charges and maintain accurate log
- Process all payments received for Chabad House
- Process all program forms and ensures all payments are received

Meetings/Office Hours

- Attends/conducts monthly staff meetings on \_\_\_\_\_
- Office hours:  
Monday – Friday                      8:30 AM – 5:00 PM