EVENT / PROGRAM SUMMARY

Event / Program Information:

Name: _____ Date & Time: _____

Location: _____ Location Contact: _____

Goals:

Anticipated # of Attendees: _____

New Life Members _____ # of New Annual Members: _____

of Renewed Members: _____ # of Total New Members: _____

Leadership: _____

Education: _____

Marketing: _____

Money to Be Raised for (check one):

Greatest Need: _____ HMO (specify): _____

Youth Aliyah: _____ HCJ: _____

Young Judaea (YJ): _____ JNF: _____

YJ Scholarship: _____ Tower Campaign: _____

Other (specify): _____ Chapter/Unit Operations: _____

Committee Information

Event Chair(s)/ Coordinator(s): _____

Committee Members: _____

_____

_____

_____

_____

Other Organizations / Coalitions / Sponsors:

Name: _____ Contact: _____

Name: _____ Contact: _____

Hadassah Communication Protocol (please direct information to appropriate person)**:**

President: _____ Vice-President: _____

Chapter/Unit Staff: _____ Other (specify): _____

Post Event Information:

Total Income: _____ Total Expenses: _____

Actual # of Attendees: _____ Age Range: _____

Actual # of New Members: _____ Actual Money Raised: _____

Goals Met? _____

_____

Additional Comments: _____

_____

_____

_____

Adapted using event planning documents courtesy of St. Louis Chapter and Chicago Chapter

EVENT / PROGRAM BUDGET WORKSHEET

Event / Program Information:

Name: _____ Date & Time: _____

Location: _____ Location Contact: _____

Anticipated # of attendees: _____ Money to be raised for: _____

Anticipated # of New Members: _____

Event Chair(s) / Coordinator(s): _____

Income	**Projected**	**Actual**	**Comments/Description**
# Paying Attendees *	$	$	*Don't include 'comps' in #
Couvert per Person	$	$	
Total Income from Attendance	$	$	
Donations	$	$	
Other Income	$	$	
TOTAL INCOME	***$***	***$***	
Expenses	**Projected**	**Actual**	**Comments/Description**
Invitation Shell/Paper Purchase	$	$	
Printing, Invitation	$	$	
Printing, Other (program, pledge card etc)	$	$	
Postage, Invitation	$	$	
Postage, Other	$	$	
Advertising/Publicity	$	$	
Facility/Room Rental	$	$	
Table/Chair/Etc. Rental	$	$	
Other Facility Fees (parking, electrical)	$	$	
Audio Visual Equipment Rental	$	$	
Photographer / Videographer	$	$	
Speaker/Program Fee	$	$	
Speaker Transportation (airfare, taxi etc)	$	$	
Speaker Lodging	$	$	
Caterering (# x cost per person)	$	$	
Additional Food (nuts, candy, wine etc)	$	$	
Gratuity/Service	$	$	
Security	$	$	
Door Prizes/Gifts (not related to raffles)	$	$	
Flowers/Decorations	$	$	
Paper Goods (plates, utensils etc)	$	$	
Credit Card Fees	$	$	
Hadassah Certificates / Gifts	$	$	
Bus Service	$	$	
Other	$	$	
TOTAL EXPENSES	***$***	***$***	
Additional 10% for misc. expenses	$	$	
TOTAL EXPENSES INCL. 10%	***$***	***$***	
ESTIMATED PROFIT/LOSS	***$***	***$***	

Please use this form to project income and expense, then to record/reconcile actual expenses after the event / program.

Adapted using event planning documents courtesy of St. Louis Chapter and Chicago Chapter

EVENT / PROGRAM TASK LIST

Event / Program Information:

Name: _____ Date & Time: _____

Location: _____ Location Contact: _____

Anticipated # of attendees: _____ Money to be raised for: _____

Anticipated # of New Members: _____

Event Chair(s) / Coordinator(s): _____

TASK	PERSON RESPONSIBLE	DUE DATE
-Form **Committee** -Schedule Committee Meetings -Give info to President/ office		
-Pick **Date** -Check Community Calendar -Notify President/ office		
-Develop **Budget** -Review and consult with President/ Vice-President and Treasurer -Give copy to President/ office		
-Pick **Site** -Contract for Site -Give info to President/ office		
-Book **Speaker** / Program -Make hotel/travel arrangements if needed		
-Create **Invitations** -Get approval B4 printing from President, Marketing Chair, Vice-President, office staff -Give copy to President/ office		
-Create **Mailing List** in Excel -Print mailing labels or -Put on disk for printer		
-Provide information for Chapter/Region **Website** -Include something on website about the event		
-In house printing: -Print invitations -Print mailing labels -Stuff and stamp -Mail		
-Professional Printing: -Provide proof / disk to printer -Have printer deliver to bulk mail -Get bulk mail pricing from P.O. & give info to President/ office		
-Set up **RSVP** Process & Date -Arrange for collection of event fees		
-Develop **Education** Plan -Consult with Education Vice- President		
-Develop **Fundraising** Plan -Consult with Fundraising Vice-President		
-Develop **Marketing** Plan -Consult with Marketing Chair		
-Develop **Membership** Plan -Consult with Membership Vice-President		

Adapted using event planning documents courtesy of St. Louis Chapter and Chicago Chapter

TASK	PERSON RESPONSIBLE	DUE DATE
-Develop **Evaluation** -Consult with President, Vice-President, office staff (Director) -Duplicate -Distribute & collect at event		
-**Equipment** Needs: -Microphone, podium, TV, VCR, Laptop -Flip chart, easel -Tables, chairs -Other:		
-**Decorations**		
-Develop Plan for F**ood / Drinks** -Purchase food or book caterer -Give catering contract to President/ office -Plan **set up** and **clean up**		
-Develop **Programs** -Get approval from President, Marketing Chair, Vice-President, office staff (Director) -Duplicate		
-**Registration** Table / **Hostesses**		
-Hadassah Materials / **Display** -Cards, Brochures, Magazines, -Table Top Displays, etc.		
Photographer -Arrange for or -Borrow Digital Camera -Get photograph release form signed by members attending event		
- **Gift** for Speaker **-**Thank you **letter to committee**		
- **Monies** Received -Give all Monies received to Treasurer/ office -Give all receipts to Treasurer/ office		
- Give **Event Report** at Next Board Meeting		
- E-mail Digital **Photos** to Appropriate Person / Office		
-Other		
-Other		

Adapted using event planning documents courtesy of St. Louis Chapter and Chicago Chapter

WHEN *A* GUEST VISITS...

Definition of a guest: Anyone who is not a member of your unit who will be attending and/or speaking at your meeting.

Make sure everyone involved with the meeting or event has a copy of this checklist and that the responsibilities have been assigned.

LOCAL GUESTS

> Provide all the necessary information about expectations and responsibilities, i.e. contact person's name and contact information, who the audience is, demographics of audience, what the meeting purpose is, what topic the guest will present on etc.

> Give all necessary information i.e. clear directions to the function, time frame, how to get to the hotel room from meeting location etc.

> Obtain guest's bio ahead of time and assign someone to make the introduction if the guest is to speak. If the bio is lengthy, check with the guest to see which information she'd like included in the introduction. Bios should never be read verbatim for an introduction.

> Make sure that the check-in/registration desk knows who the guests are.

> Make sure someone is assigned to meet the guest at the door and introduce the guest to attendees.

> If a meal is involved, let the guest know she is your "guest" and that there is a reserved place at a table.

> If the guest is a National Board member, let the guest know the names of all other National Board members (past and future) who will be in attendance.

> Arrange an adequate amount of time for the guest to speak or make her presentation.

- If possible, send the agenda ahead of time as soon as possible so the guest knows what to expect.

> If possible, name tags should be worn so the guest will feel comfortable talking with those in attendance. If a Region event, add name of unit.

> If appropriate, present the guest with a <u>small</u> token of your appreciation or a certificate, appropriate to carry home or make arrangements for shipping. Be alerted to size and security measure (airports) if guest is from out of town. A hand-written thank you note should be sent shortly after the meeting or event.

GUESTS FROM OUT OF TOWN

> Invite the guest as far in advance as possible.

> Provide contact person's name and contact information, who the audience is, demographics of audience, what the meeting purpose is, what topic the guest will present on etc.

> Make the appropriate hotel reservations. Private and non-smoking room should be provided unless the guest requests otherwise. It should be in an accommodation you yourself are comfortable staying in. Notify hotel about late check-in, if applicable.

> Arrange for a hospitality basket to be waiting in the hotel room.

> Obtain the guest's bio in advance and arrange for her to be properly introduced. If the bio is lengthy, check with the guest to see which information she'd like included in the introduction. A bio should never be read verbatim as an introduction.

> Send an agenda as soon as possible so the guest knows what to expect.

> Arrange for an adequate amount of time on the agenda for the guest to make her presentation(s).

> Arrange for someone to meet the guest at the airport or train station. If this isn't possible, let the guest know that they will have to take a cab (and approximate cost) and that a receipt for the ride should be given to someone in charge for reimbursement.

> If meals are involved, let the guest know that she is your Group, Chapter, Big Chapter or Region's guest and that there is a reserved place at a table.

> If the guest is arriving the day/night before the event/meeting, arrangements should be made to "entertain" (i.e. dinner, sightseeing, shopping) the guest.

> Transportation arrangements should be made for the guest to attend the event/meeting.

> Provide the guest with information about other National leaders who will be in attendance as well as information about the key players of the Group/Chapter/Big Chapter/Region.

➢ with those in attendance. If a Region event, add name of unit.

> If appropriate, present the guest with a <u>small</u> token of your appreciation or a certificate, appropriate to carry home or make arrangements for shipping. Be alerted to size and security measure (airports) if guest is from out of town.

> Transportation arrangements should be made for the guest to return to the airport or train station.

- A hand-written thank you note should be sent shortly after the meeting or event.

>

Developed by Organization Division, 2006

Insurance

Insurance Do's and Don'ts

Do not sign letters or agreements containing "hold harmless" or "indemnification" clauses that require Hadassah to protect the landlord from claims arising from Hadassah's use.

Do not agree to insurance requirements that include the language "cross-liability endorsement", "separation of insureds" or "primary and non-contributory" because these phrases significantly increase our exposure.

Do not agree to a "waiver of subrogation" unless it is mutual.

Do consult with the Legal Department on any request from an owner who insists on any of these clauses.

Bonding Insurance

Hadassah provides insurance for losses up to $2,500 of Hadassah money while in the custody of employees, officers, or chairs. Losses should be reported immediately in writing to the National Legal Department, 50 West 58 Street, New York, NY 10019. There is no charge to the Region/Chapter/Group for this coverage. Obtain your own coverage at your own cost if you must have $2,500 or more on hand and if you want additional insurance against damage or loss of equipment.

National Hadassah does not provide coverage for damage, loss, or theft of Region/Chapter/Group property or equipment. If you need this coverage, arrange for it through a local broker.

Liability Insurance for Permanent Premises

Check with the National Hadassah Legal Department, 50 West 58 Street, New York, NY 10019 or fax 212-303-7436 to learn if National insurance covers your Chapter/Group's permanent premises. If not, you must purchase your own liability (including products, completed operations and terrorism coverage), fire, and theft insurance, with minimum limits of $1 million for the liability insurance. The policy should name the following parties as "additional insureds": Hadassah, The Women's Zionist Organization of America, Inc.; Hadassah Medical Relief Association, Inc., their affiliates and related entities; and their respective officers, directors, employees, volunteers, members, agents, representatives, successors, assigns, and licensees. If your lease requires higher limits, be sure to comply. It is recommended that the Region/Chapter/Group purchase an umbrella (excess) liability policy of at least $5 million for permanent locations.

Liability Insurance for Temporary Premises

A temporary location includes those that the Chapter/Group may use once a week on a regular basis.

Your Chapter/Group is covered by National against any claims for alleged injuries sustained at events held at temporary locations, such as stores, rooms in centers, meeting halls, hotels, or restaurants. There is no charge to the Region/Chapter/Group for this coverage. (This is not medical reimbursement insurance, which Hadassah does not provide.)

If your Chapter/Group occupies temporary spaces for longer than a month or if a temporary location requests proof of insurance coverage, contact National Hadassah Legal Department, 50 West 58 Street, New York, NY 10019 or fax 212-303-7436 and request a certificate of insurance. Send in your request sufficiently in advance to allow time for processing, at least two weeks before the event.

Report any accident to the National Legal Department, 50 West 58 Street, New York, NY 10019 or fax 212-303-7436 immediately after it occurs and follow up with a detailed report that includes the names and addresses of witnesses.

Buses

All bus companies to be hired for Hadassah events should comply with the Insurance Requirements for Hiring Buses. You should obtain and review the bus company's certificate of insurance to make sure that it meets the requirements. You should review the bus contract/confirmation to make sure that the dates, times, route, number of passengers, driver information, and pricing are correct and that you understand the cancellation policy. Call the bus company several days before the scheduled pickup date to confirm the reservation.

For Trips -Responsibility and Liability Disclaimer

The Responsibility and Liability Disclaimer is a form to be used by Hadassah units that sponsor trips that are more than one day in duration. When the trip is arranged with a travel agent, cruise line, etc., Hadassah acts only as an agent for the participants. Hadassah's only responsibility is to transmit the participants' funds to the travel agent or cruise line, etc. Each participant in a Hadassah sponsored trip must sign the Responsibility and Liability Disclaimer. The form should be distributed with all trip information. These signed forms must be kept in the Region/Chapter/Group records in perpetuity. Participants should be strongly encouraged to purchase trip cancellation insurance. In addition, the trip cancellation/refund policy should be clearly stated on any trip materials. Proof of insurance is not necessary from travel agents, airlines, cruise lines, etc.

Insurance for Employees/Volunteers

Workers' compensation insurance is required by law if the Region/Chapter/Group has salaried office and/or thrift shop employees. It is also recommended that the workers' compensation insurance include coverage for the volunteers who work in the permanent office and/or thrift shop location, since such insurance will cover any costs they may incur in connection with an injury which may occur while working in the office/store. The Region/Chapter/Group should also contact the National Human Resources Department, Humanresources@hadassah.org, regarding other insurance required for salaried employees.

When National Personnel Come to Town

- When a member of the National Board comes to your community she is your guest. If she is coming as a National representative her transportation is paid for by National Hadassah.
- If she is coming to a special Chapter function you may be responsible for her travel expenses (check beforehand).
- As the host Chapter you are responsible for local transportation and her meals. She should be housed at a reputable hotel or motel with shuttle service to the airport.
- It is your choice but especially nice if the Chapter President decides to meet her at the airport when arrival is at a reasonable hour. Asking her to take the shuttle when she leaves, especially if it is at a difficult time is all right.
- A welcome basket in her room is always nice.
- The speaker should be left alone for at least an hour before an event to allow her to collect her thoughts, freshen up or whatever. Do not leave her alone for meals. When transporting her, do not take her to do errands, shopping or children' s carpooling.
- Arrange as many opportunities for her to meet women in your community as possible. By prior arrangement, if time perm its National personnel can also help with organizational problem solving and major donor solicitations.

PROTOCOL

Government rules for the use of another nation's flag and anthem with those of the United States

Flags

Form the office of Protocol of U.S. Department of State; information embodied in Public Law 829-77'th Congress:

a. Display of OTHER NATION'S FLAGS WITH AMERICAN FLAG IS PROPER.
b. The UNITED STATES FLAG is raised or placed in position FIRST.
c. Flags should be the SAME SIZE.
d. U.S. FLAG should be on SPEAKER'S RIGHT (left of audience on dais).
e. If posted on AUDITORIUM FLOOR, U.S. FLAG is placed to RIGHT OF AUDIENCE.
f. Flags of all OTHERS NATIONS placed to SPEAKER'S LEFT on dais.

Anthems
The STAR SPANGLED BANNER FOLLOWS the foreign country's anthem.
HATIKVAH should be sung FIRST, the STAR SPANGLED BANNER, LAST.

This holds true *even* when the guest speaker or visiting dignitary is an Israeli.

THERE IS ONLY ONE EXCEPTION TO THIS RULE: when a visiting artist or group (orchestra or chorus) from a foreign land PERFORMS the two anthems, the anthem of the country of the visiting artist or group is played last.

Wording to Be Included on ALL Solicitation Materials

The Legal Department of Hadassah has issued the following memo:

To help safeguard the tax deductible status of the donations made to Hadassah, we ask that the following be included in ALL of your solicitation materials.

"While Hadassah intends to respect your wishes regarding this gift, in accordance with U.S. tax law requirements regarding deductibility of contributions, Hadassah shall have full dominion, control and discretion over this gift."

- You need not reproduce any materials you are presently using. However, we recommend that this information be added wherever possible before new materials are printed.
- Donors may still designate their gifts! Hadassah will honor those wishes as they have in the past.

We understand that upon first reading this wording, there might be some anxiety that donors might get annoyed or angry. It is therefore imperative that you understand why this wording is necessary so that you can allay any misconceptions.

U.S. tax rules require, as a condition of donors claiming charitable contribution deductions, that the recipient U.S. charity not act as a pass through vehicle for contributions that are intended for institutions that are located in other countries. By using the language above on your solicitation materials, we are affirming to U.S. authorities that Hadassah understands this prohibition. This language help protect the tax deductibility of your donors' gifts. While Hadassah intends to *respect* your donors' wishes regarding the designation of their contribution, Hadassah is required to *exercise* control over contributions if it is to comply with the regulations concerning funds that are sent overseas

TO BRING

AT ANY FUNCTION OR EVENT

- Extra name tags
- Registration rosters
- Table registration signs
- Times schedules
- Clipboards
- Session Signs (room locations)
- Directional signs
- Certificates of Thank you
- Pens, markers, tape, scissors, paper clips, stapler
- Camera
- Resource materials
- Programs
- Flags and stands
- Check book