



Temple Beth El
Jewish Community Center

Your Guide to Creating
Events & Programs

at

Temple Beth El

Creating Events & Programs at Temple Beth EI

The staff at Temple Beth EI is committed to supporting you! We now have this carefully designed packet to enable all of us at Temple Beth EI to communicate a uniform and unified message. When we partner with you to provide a location, generate publicity and help produce mailings, please use this clear-cut system to produce any program or event at the Temple. There are signoffs to acquire for each step in our process. The current staffing list is provided at the end of this packet.

Step 1. Temple Beth EI Events Proposal Form.....page 1

If you'd like to have a one-time event or a recurring program, this is where you get started. This form is your first, required step.

Step 2. Facility Services/Calendaring.....page 3

Please use the Facility Services Checklist/Worksheet to determine what your needs will be and call the Facility Services Coordinator at 479-3444, ext 203 to set up a meeting.

Step 3. Publicity.....page 4

To determine the best way to reach your audience, please contact our Program Administrator at 479-3444 ext 204.

Step 4. Mailings.....page 6

Please use the Mailings Checklist to determine what your needs will be and call the Office Manager at 479-3444, ext 216.

Appendix:

Event Countdown.....	page 7
Explanation of Costs.....	page 8
Reimbursement Policy.....	page 8
Budget Worksheet.....	page 9
Keeping Event Funds Secure Worksheet.....	page 10
Check Requests.....	page 11
TBE Event Contacts for the Current Year.....	page 13

We love to make you look good! When we receive your communication in a timely manner, it's easy to do.



Step 1. Events & Programs Proposal Form

See reverse side for instructions

This is the first step to have an event at Temple Beth El and we look forward to reviewing your proposal. In order to have your event approved at a clergy /executive meeting, this form must be submitted to the Temple Administrator, Temple President, or Vice President of Worship & Justice. Feel free to attach any supporting documentation.

1. Event or Program Name:

2. Purpose of Event or Program:

3. Target Date for a one-time event if available: _____ **or** **Target Dates for a recurring program if available:** _____

Other possible dates: _____

4. Target Audience: TBE Community Open to the public
 Other _____

5. Funding to come from:

TBE Sponsored Event Income-generating event

Other _____

6. Contact Person for the Event: _____

Phone number: _____

Email address: _____

After this page is signed at a clergy/executive meeting, copies will be made and distributed to the relevant departments. This form will then be returned to you for future reference. Contacts below this line will be filled in at the time of your event's approval.

(Temple Administrator, Temple President, or Vice President approval signature) (Date)

The VP designated to your event is _____, who may be reached at _____
The VP of Worship and Justice is _____, who may be reached at _____
Your account tracking # is _____ to be written on all check requests (please see Budget Worksheet).



Step 1. Events & Programs Proposal Form Instructions

The other side of this page is where you get started. This form is your first, required step to having an event at TBE. Once it is returned to you, *please keep hold of this form for your reference.*

1. Event or Program Name:

What will you call your event? In order to create consistent advertising and publicity, the name you list here is how your event will be known from its creation through to its completion. Please be certain you are pleased with the name you choose on this form!

2. Purpose of Event or Program:

Is it a fundraiser? A meeting? A party? A class? Let us know the intention of the event or program.

3. Target Date:

TBE is a popular spot to hold events and programs and the spaces fill early. Please give us a range of dates. Consider the countdown at the end of this packet to get a better understanding of how best to meet our deadlines.

4. Target Audience

Are you hoping to have the whole TBE community? Just singles there? An older crowd? People who do yoga? Let us know here.

5. Funding to come from:

Is this a Temple sponsored Event? Will the event generate income? Let us know how the costs will be covered.

6. Contact Person for the Event:

The most effective way to communicate back and forth between TBE and the group creating the event is for your group to establish *one* person as the *only* liaison between the group putting on the event and the Temple. That way, your contact person can disseminate the information among your group members and can let us know precisely what you need to promote clear communication.

Chain of Communication:

Your group ↔ contact person ↔ TBE

The Vice President of Worship and Justice, whose phone number is listed on the front of this form, will also be happy to assist you in determining the most effective course of communication.

Contacts in the box at the bottom will be filled in at the time of your event's approval. This box contains information you may often want to refer to as your event develops.



Step 2. Facility Services Checklist/Worksheet

Congratulations, your event has been approved! TBE is a popular spot to hold events and programs and the spaces fill early. We'll do our best to accommodate you. The sooner you call our Facility Services Coordinator, the better your chances are of holding your event just when and where you want to have it. Please contact our Facility Services Coordinator regarding the date(s), location and time and for assistance in filling out this form: 479-3444, ext. 203.

- Check with the Facility Services Coordinator to make sure your chosen date is available!

Approved date of event: _____

- What time does the event begin and end? Make sure your communications to the Temple and your advertisers are all consistent with regard to start time! What time will you need to get into the building to set up? How long will you need to clean up?

Length of time: _____ from: _____ to: _____

How many people can I expect? Will the people be seated to listen to a speaker, for dinner, dancing to music?

Estimated number of attendees: _____

- Do you need a sound system? Audio-visual Equipment?
- How many volunteers will be needed to ensure smooth execution of my event? Create a list of tasks, then make calls to secure people to work. Write everything down and have the volunteers committed to specific hours and duties.

Volunteer Chairperson: _____ Number of Volunteers: _____

Set-up committee From when: _____ to when: _____

Clean-up committee From when: _____ to when: _____

- Committees called & confirmed?
- Who will watch the front door? Events advertised to the general public require at least one uniformed security guard. Private events do not. This is beyond the scope of custodial duties. Make hiring arrangements with the Facility Services Coordinator to budget and retain security guards. The current discounted rate is \$20/hr with a four-hour minimum.

- Have you addressed parking issues? There are only 63 spaces. Talk to the Facility Services Coordinator for additional parking and/or shuttles.

- What about budgeting for linens, custodial staff time, food, beverages, decorations, etc? Please see the Budget Worksheet in this packet for our policies regarding petty cash.
- Has the Facility Services Coordinator reviewed this checklist with you? This is important because the coordinator will **reserve your spot** by adding your event to the Master Calendar, where all staff and Board Members will see it listed.

Please move on to the next page-- Step 3. Arranging Publicity with our Program Administrator



Step 3. Arranging Publicity with our Program Administrator (Continued on next page)

Please contact the Program Administrator to ensure maximum attendance at your event.

The Program Administrator will be your representative to the local press. Questions regarding publicity will be directed to her/him.

What's available?

There are a variety of sources the Program Administrator uses to publicize your event.

Free:

The Shofar, the Temple Newsletter

www.tbeaptos.org, our website

Weekly email and service announcements

Voice announcements

Public Service Announcements (PSAs)
on Local Radio Stations

Commercial Spots on Community Television

The Community Events Page in the Sentinel

Require payment from your event's budget:

Ads in The Good Times

Ads in The Metro

Ads in The Sentinel

What about flyers, banners, posters, letters, etc.?

You are welcome to design your own publications. The Program Administrator will approve all publications before you print them. Why? To make sure all the information is consistent, and check for typos and misprints, as well as to ensure a uniform look to all Temple publications.

Please follow the Identity Guideline on the next page to design Temple Publications.

What should I do to publicize my event?

- At least six weeks before your event, please send a text file (.txt) by email, or send in the body of an email, the **event name, contact person's name, event date, start time**, and a **brief description** of the event to the Program Administrator (asuer@tbeaptos.org). Why a text file? Word documents often have hidden formatting that .txt files do not. The Program Administrator can format a .txt file correctly.
- If you would like to design your own flyer, please follow the Identity Guidelines on the next page, and bring it to the Temple to be approved before printing. In-house printing may be available. Please see Step 4, our mailings page.
- Call the Temple to discuss publication options with the Program Administrator at (831) 479-3444 ext 204.

After your flyer is approved, please move on to the Mailings Checklist on page 6.

(continued)



Step 3. Arranging Publicity with our Program Administrator *(Continued from previous page)*

Identity Guideline

Temple Beth El Logo & Fonts

The Temple Beth El Logo is an important aspect of how TBE is perceived. Consistent use of our logo will ensure its strength and long-term recognition. If using an outside printer, please show them this page.

Our logo includes both the logo and the logotype (words next to it). The logo will be at the top or bottom of every publication.

Temple Beth El
Jewish Community Center

Title of Sample Flyer

Sample Heading

Though this is a flyer, all ads, posters, banners, handouts, and every other publication promoting Temple events should look like this sample flyer. Our logo and fonts are key elements of our organizational identity. It is designed to clearly identify TBE. The logo is an important aspect of how TBE is received.

Headings are in 10pt Bold Arial Font

The body paragraphs should be in 10pt Arial font. If Arial is not available, a simple sans-serif font should be used. The font of our logotype is papyrus, but it should only be used to highlight the title at the top of every flyer.

What every publication should include

Every publication, whether a poster, flyer, handbill, or banner, should include the event name, date, contact person's name, start time, and a description.

Feel free to use graphics appropriate for your presentation. High quality photographs will increase your event's attendance by making it look more appealing to possible attendees.

ADA Language (←font size may vary)
Temple Beth El wishes to make this program accessible to people with disabilities. If you have disability-related needs, please contact the Facility Services Coordinator at 479-3444 ext 203 as soon as possible.

Temple Sponsored Events should have the contact info for the Temple on the last line, like so:

Temple Beth El ● 3055 Porter Gulch Rd., Aptos, California ●
(831)479-3444 <http://www.tbeaptos.org> ● fax (831)475-7246 ●
info@tbeaptos.org

Don't forget to leave sufficient white space around our logo. It will then be easy to read.

If you are using color, use it consistently. Our colors are white and blue #003399. For use in color backgrounds, our logo reverses to solid white.

Title will be in Papyrus, large size font. Call the Program Administrator if you need this font or the logo emailed to you.

Please include the event name, date & start time, the person to contact for more information, and a description of what will happen.

All publications that are sponsored or co-sponsored by the Temple will include our contact info, even if the event takes place outside the Temple. Why? So that the Temple is easy to contact for questions or clarification.

ADA language is mandatory on all flyers, required by law, and also to show that the Temple is inclusive to all.

Don't forget the Program Administrator will approve all publications before they go to press.



Step 4. Mailings Checklist

Prepare to send out your mailing three weeks prior to the event

To get the best turnout for your event, coordinate the mailing of the approved, final version of your flyer with the Office Manager by calling 479-3444 extension 216. A few days before the mailing, review your budget and let the Office Manager know what your specific mailing needs are. Special materials and postal fees come out of your event budget.

Number of people you will be sending this to: _____

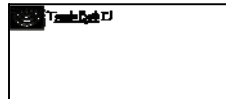
Papers

Type of paper you require:

- Letterhead: You need to adjust your left hand margin to 2.3 inches to account for our letterhead layout.
- Plain or Color of paper: _____

Envelopes

Will you need: Temple Beth El Envelopes?



Return Envelopes?



Address Labels

Is the event temple wide, or just for folks over 65? With our database, we may be able to help you narrow down your choices. Once the office knows to whom you need the mailing sent, the Office Manager can create address labels.

Group you are mailing to: _____

Postage & Using the Temple's Stamping Machine

- Have you coordinated a group of volunteers to label and insert the flyers in the envelopes?
- Have you called us to let us know you are ready for us to help you mail out your materials? To orchestrate a mass mailing, please call the office two to three weeks in advance.

or

Bulk Mailings at the Post Office *This not recommended due to personnel time involved.*

If you would still like to do your own bulk mailing, please contact our Office Manager at least one week in advance. You will be provided with the proper forms and the post office's requirements for your group to sort and bundle your mailings. You may reach the Office Manager at 479-3444 extension 216.

- ☞ Your mailings will take anywhere from *a few days to a few weeks* to reach their destinations because they are not sent priority mail.
- ☞ The Aptos Post Office is only open for Bulk Mailings from 10am-12pm and 1pm – 4pm. You will need to have the correct count, weigh the bundles, etc...



Event Countdown

This is a great way to create your own calendar and keep track of what you need to do when!

- As soon as you come up with the idea for your event, please submit the Event Proposal Form to the Temple Administrator, Temple President, or Vice President of Worship & Justice to have it presented for approval at a clergy /executive meeting.
- Once the event has been approved, review the Facility Services Worksheet and call the Facility Services Coordinator, who will set a date for your event.

Six Weeks Before Your Event: _____
(write the date here)

- After the Facility Services Coordinator has approved your event date, contact the Program Administrator to discuss publicity.
- In the body of an email to the Program Administrator at *asuer@tbeaptos.org* include the event name, contact person information, date, time, and a brief description of your event or attach it in a text (.txt) file. At six weeks before the event, **this is the way to be sure your event gets in our newsletter, The Shofar.**

Three Weeks Before Your Event: _____
(write the date here)

- This is three days before you are ready to send out your mailing.* Speak with the Office Manager to see if we have the envelopes and paper you want on hand. Please review the Mailings Checklist and set up a mass mailing with her/him if applicable.

Two Weeks Before Your Event: _____
(write the date here)

- Please finalize the following checklist with the Facility Services Coordinator.
 - Set up time, event time, and clean up time.
 - The set up (placement of tables and chairs)
 - Linen order.
 - Do you need cash boxes?
 - Arrangements to use the kitchen. Be clear regarding everything you'll need (i.e., serving trays, flatware, sound, custodial expectations, etc.)
 - Sign the appropriate contracts with the Facility Services Coordinator and pay any fees incurred.

One Week Before Your Event: _____
(write the date here)

- Check with your speakers, entertainment, caterer, etc. to make sure they know how to get to Temple Beth El, what time they should be here and where they can park.
- Call all your volunteers to make sure everyone knows exactly what is expected of them.

Three days before your event: _____
(write the date here)

- Check with the Facility Services Coordinator to make sure the set up is accurate (attendance often changes). Communicate any other changes at this time.



Explanation of Costs, Reimbursement Policy & Budget Worksheet

Purchase Approval

Contact the Vice President of Worship and Justice to see if there is an established budget and account number used to track your event. This information is listed on your copy of the Events Proposal Form. If you have an idea for an event that has not been accounted for in the current budget, you need to finance the event with your group or submit the event for the following fiscal year. TBE reviews the budget for events each March for the following year.

Before you make any purchase, be sure you have accounted for it in your budget. Collect receipts for all event related purchases. Note our reimbursement policy below.

- **Facility**
Please see the Facility Services Checklist/Worksheet in this packet to see what fees, if any, are to be included in your budget. Contact our Facility Services Coordinator at 479-3444 ext. 203 with questions.
- **Publicity**
Advertising costs vary. Contact our Program Administrator at 479-3444 ext. 204 with your budget to determine your options.
- **Fundraising / Money Handling**
Please use the second side of the following worksheet.
- **Mailing Costs**
Some materials may only be available by request. Please review the Mailings Checklist in this packet and then contact our Office Manager at 479-3444 ext. 216 with questions.

Reimbursement Policy

- ☞ Please know your program's budget before you make purchases. Is the facility rental, publicity, or mailing cost covered? The Board member assigned to your group and the Vice President of Worship and Justice will both have this information.
- ☞ After making purchases for your event, bring your receipts stapled to a check request to the office *within 45 days*. Check requests can be found at the end of this packet and in the office. Be certain the account tracking number from the Events & Programs Proposal Form on page one of this packet is on each check request.

NOTE: After the check request is approved, the reimbursement will be issued in about two weeks.



Event Budget Worksheet

This worksheet is for you to keep easy track of your spending. Consult the Board Member in charge of your group for costs covered by TBE. *Save your receipts!* Please review our explanation of costs and reimbursement policy on the previous page. If you need more space, feel free to attach pages. **NOTE:** For fundraisers, fill out the back of this form.

APPROVED BUDGET = \$ _____

1. Purchases:

_____ - \$ _____

_____ - \$ _____

_____ - \$ _____

_____ - \$ _____

_____ - \$ _____

Feel free to attach pages.

section total = \$ _____

2. Facility Costs:

_____ - \$ _____

_____ - \$ _____

_____ - \$ _____

_____ - \$ _____

Please use your Facility Services Checklist.

section total = \$ _____

3. Publicity Costs: *Please contact our Program Administrator at 479-3444 ext. 204 before spending.*

_____ - \$ _____

_____ - \$ _____

_____ - \$ _____

section total = \$ _____

4. Mailing Costs:

_____ - \$ _____

paper and envelopes _____ - \$ _____

stamps _____ - \$ _____

200 letters (less than 1 oz. each) = \$78 in stamps

section total = \$ _____

5. Amount from any attached additional costs total = \$ _____

6. Total spent = \$ _____

7. Total funds remaining = \$ _____



Keeping Event Funds Secure Worksheet

To prevent theft, please do not leave cash unsecured!
TBE is not responsible for keeping track of your cash.

If this is a fundraiser...

Who will benefit from any money raised?

Use the space below to plan how the money made at the event will be secured.

☞ **Before the event:**

Please make arrangements with the office in advance:

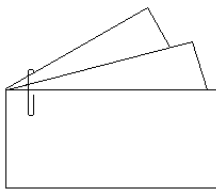
- If you would like to accept credit cards
- To get a locking cashbox. **NOTE:** You must provide your own petty cash.

☞ **During the event:**

Be sure someone trustworthy from your group is monitoring the cash box *at all times*.

☞ **After the event:**

1. Write a personal check to "TBE" to cover the cash amount (minus your own petty cash)



2. Attach that personal check to any other checks you received

3. Attach a note listing your event's account tracking number from the Events & Programs Proposal Form on page one of this packet.

4. Place all checks in our donations drop box outside the office.

Please take the cash off site with you. Have someone (the security guard?) escort you to your car.



Temple Beth El
Jewish Community Center

TBE ~ Check Request

Date of Request _____ Requested by _____ Is this a Reimbursement*? Y / N
Pay to the order of _____
Address _____

Explanation _____

Please itemize below		Account:	
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Total \$ _____	Amount Requested		(↑listed on your Event Proposal Form)

OFFICE USE ONLY	Other Instructions	Treasurer Approval _____
		Temple Admin Approval _____
		Amount Approved \$ _____

*Please Note: You must attach all receipts to receive a reimbursement. Reimbursement receipts must be received within 45 days of incurring the charge. More check requests are available in the Temple Office.



Temple Beth El
Jewish Community Center

TBE ~ Check Request

Date of Request _____ Requested by _____ Is this a Reimbursement*? Y / N
Pay to the order of _____
Address _____

Explanation _____

Please itemize below		Account:	
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Amount \$ _____	Charge to _____		Account # _____
Total \$ _____	Amount Requested		(↑listed on your Event Proposal Form)

OFFICE USE ONLY	Other Instructions	Treasurer Approval _____
		Temple Admin Approval _____
		Amount Approved \$ _____

*Please Note: You must attach all receipts to receive a reimbursement. Reimbursement receipts must be received within 45 days of incurring the charge. More check requests are available in the Temple Office.



Temple Beth El
Jewish Community Center

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TBE Event Contacts for 2006

Vice President of Worship and Justice

Roberta Viviani

Phone: 462-2549

Email: roberta57@cruzio.com

Facility Services Coordinator

Dianne Brumbach

Phone: 479-3444 ext. 203

Email: dbrumbach@tbeaptos.org

Volunteer Coordinator

Lin Wapner

Phone: 338-1707

Email: Rwapner@Earthlink.Net

Program Administrator

Amber Suer

Phone: 479-3444 ext. 204

Email: asuer@tbeaptos.org

Office Manager

Elaine Cruci

Phone: 479-3444 ext. 216

Email: ecruci@tbeaptos.org