



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 Executive Director, 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. Which account will the expenses be charged to? _____ **Which account will the income go to?** _____

7. 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.

(Executive Director, 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 back page of this packet, 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. 208.

- Check with the *Executive Director* 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? Other special requests?
- How many volunteers will be needed to ensure smooth execution of your 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 \$30/hr with a four-hour minimum.

- Have you addressed parking issues? There are only 63 spaces. Talk to the Executive Director 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 Executive Director reviewed this checklist with you? This is important because the ED will **reserve your spot** by adding your event to the Master Calendar, where all staff will see it listed.

Please move on to the next page-- Step 3. Arranging Publicity with our Executive Director



Step 3. Arranging Publicity with our Executive Director (Continued on next page)

Please contact the Executive Director to ensure maximum attendance at your event.

The Executive Director 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 Executive Director uses to publicize your event. The avenues of publicity we choose for a given event are based on a number of criteria, such as event size, whether or not the event is open to the public, event budget, etc. There are three general categories of events – A, B and C, from large to small. (The publicity we offer for your event will generally follow the guidelines given below, but there is flexibility according to your event's needs.)

Descriptions of Event Categories and Corresponding Publicity:

"A" Events

- Are open to the public
- Are intended to attract a larger amount of people (about 100 or so)
- Probably have some kind of event budget
- Possibly are more than one day long

For "A" events, we will offer the following publicity:

- Calendar ads in the *Metro*, *Good Times*, *Sentinel*, *Mid-County Post*, *Aptos Times*, *Capitola Times*, *Scotts Valley Times*, i.e. all local papers. (The *Register-Pajaronian* now charges a fee for calendar ads, and is an option if the event planner wishes to fund it.)
- *The Shofar*
- TBE website
- Weekly email announcements/voice announcements
- PSAs at local radio stations
- Press releases to local papers
- Flyers/ mailing (depending on budget)

"B" Events

- May or may not be open to the public
- Are intended to attract a moderate amount of people
- May possibly have a small event budget

For "B" events, we will offer the following publicity:

- Calendar ads in local papers
- Flyers/ mailing, depending on budget
- *The Shofar*
- TBE website
- Weekly email announcements/ voice announcements
- Limited PSAs



“C” Events

- Are open to TBE members only
- Are meant to attract a small amount of people
- Have no event budget

For “C” events, we will offer the following publicity:

- Some calendar ads in local papers
- *The Shofar*
- TBE website
- Weekly email announcements/ voice announcements

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

You are welcome to design your own publications, or request the Executive Director’s assistance in producing them. The Executive Director 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 an email the event name, contact person’s name, event date, start time, and a brief description of the event to the Executive Director (jsfriedman@tbeaptos.org).
- 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 Executive Director at (831) 479-3444 ext. 208.

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

(continued)



Step 3. Arranging Publicity with our Executive Director *(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.

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.

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.

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.

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.

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 Executive Director 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 you will need to coordinate the mailing of the approved, final version of your flyer with the Office Manager by calling 479-3444 ext. 216. At least **two weeks** before sending out your mailing call the Office Manager to set up a time for someone to come in to work on your mailing. At this time 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

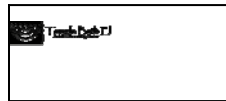
Type of paper you require:

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

If you would like to use the Temple's Postage Meter please appoint at least one member from you event to coordinate the mailing. The Office Manager will be more than happy to explain how to operate the 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 to come in and mail out your materials? To orchestrate a mass mailing, please call the office at least two weeks in advance.

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 ext. 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...

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



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 *Executive Director*, 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 Executive Director, who will set a date for your event.

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

- After the Executive Director has approved your event date, you should discuss publicity.
- If you plan on sending out a mailing please 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.

In the body of an email to the Executive Director at jsfriedman@tbeaptos.org include the event name, contact person information, date, time, and a brief description of your event. 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)

- Send out your mailing

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

- Please finalize the following checklist with the Executive Director.
 - 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 Executive Director 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 Executive Director 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 Executive Director at 479-3444 ext. 208 with questions.

- **Publicity**

Advertising costs vary. Contact our Executive Director at 479-3444 ext. 208 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 Executive Director at 479-3444 ext. 208 before spending.*

_____ - \$ _____

_____ - \$ _____

_____ - \$ _____

section total = \$ _____

4. Mailing Costs:

_____ - \$ _____

paper and envelopes _____ - \$ _____

stamps _____ - \$ _____

200 letters (less than 1 oz. each) = \$82 in stamps for a first class mailing

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:

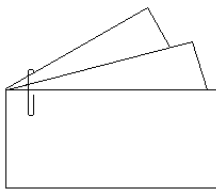
- If you would like to accept credit cards
- To get a locking cashbox. **NOTE:** You must provide your own petty cash.

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.

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



Temple Beth El
Jewish Community Center

TBE Event Contacts for 2010-2011

Vice President of Worship and Justice

Kathy Goldenkranz

Phone: 688-7971

Email: kgoldenk@msn.com

Executive Director

Jane Sable-Friedman

Phone: 479-3444 ext. 208

Email: [jsfriedman@tbeptos.org](mailto:jfriedman@tbeptos.org)

Volunteer Coordinator

Richie Solomon

Phone: 331-5650

Email: solomonzoo@comcast.net

Office Manager

Elaine Cruci

Phone: 479-3444 ext. 216

Email: ecruci@tbeptos.org