

# Checklist for Event Planning at Beth El

*This document will help you plan and organize events at Beth El so you don't forget anything important and so Beth El can properly support you. Before doing anything else, call the temple administrator and discuss the information in Part 1 below. Then fill out Part 2 to help your and your co-organizers plan in more detail.*

## Part 1: Getting Started

**Event or series title:** \_\_\_\_\_

**Organizer(s):** \_\_\_\_\_

**Date:** \_\_\_\_\_ **Time (start and end):** \_\_\_\_\_

**Will there be an outside guest speaker?** ☐ yes ☐ no

**Is this a recurring event?** ☐ yes ☐ no

If yes, please specify schedule (for example, "every third Tuesday of the month from Date A to Date B"): \_\_\_\_\_

**Audience:** \_\_\_\_\_  
(# and ages of attendees expected? Mostly Beth El folks, or others as well?)

**Will you need a security detail or Beth El staff at the event?** ☐ yes ☐ no

**AV needs:** \_\_\_\_\_  
(e.g., mic type, sound setup, computer, projector, lighting, laser pointer)

**Will the event be livestreamed or broadcast on Zoom?** ☐ yes ☐ no

If yes, who will be in charge of handling tech at the event? \_\_\_\_\_

### Room setup:

Which room at Beth El? (indicate if event will be held outside) \_\_\_\_\_

Room needs \_\_\_\_\_  
(e.g., seating, podium, tables & chairs, whiteboard/easel, writing implements)

Who will be responsible for setup and breakdown/cleanup? \_\_\_\_\_

**Will food be served?** ☐ yes ☐ no

If yes, what type of food? \_\_\_\_\_  
(e.g., hors d'oeuvres, desserts, beverages, hot meal/cold meal)

Will alcohol be served? ☐ yes ☐ no

Who will be in charge of publicizing the event? \_\_\_\_\_

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## Part 2: Event Coordinator's Checklist

*Not all of these steps will apply to every event — simply cross out the boxes as needed.*

- ☐ Confirm **date, time and location** of event with the office
- ☐ **Create a budget** and obtain necessary funding and approvals for your event. *Whenever possible, include a means of raising money to help pay for community Beth El events.*  
Things you may need to budget for:
  - Food and drink
  - Paid staff such as:
    - Speaker or teacher
    - Musicians or other entertainers
    - Caterer
    - Security
    - Photographer or videographer
    - Other
  - Decorations
  - Stationery or other materials to be used during the event
- ☐ **Track and manage purchases and/or reimbursements**
- ☐ **Create a detailed schedule** of what will happen and when (including start and end times for each activity at the event)
- ☐ **Distribute the schedule** (paper, email or both) to volunteers and attendees
- ☐ **Assign volunteers for the following tasks:**
  - ☐ Internal publicity (Event Publicity Form on Beth El website ) \_\_\_\_\_
  - ☐ External publicity (news websites, Jewish organizations) \_\_\_\_\_
  - ☐ Attendee registration recipient/compiler \_\_\_\_\_

☐ Kitchen coordinator \_\_\_\_\_

- ☐ Food and beverage providers (*for potlucks, create a [SignUp Genius](#) list to organize specific items, quantities, dropoff details, etc.*)

\_\_\_\_\_  
\_\_\_\_\_

- ☐ Food preparers and servers (collecting, cooking, rewarming)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- ☐ Kitchen cleanup

\_\_\_\_\_

☐ Room setup \_\_\_\_\_

☐ Decorations \_\_\_\_\_

☐ Greeters \_\_\_\_\_

☐ Music providers \_\_\_\_\_

☐ Security \_\_\_\_\_

☐ Transportation for speaker or attendees \_\_\_\_\_

☐ A/V coordinator (arranging Zoom coverage, display screens, etc.) \_\_\_\_\_

☐ Room breakdown \_\_\_\_\_

☐ **Send reminders** to volunteers seven days before the event

☐ **Send reminders** to volunteers the day before the event

☐ **Send thank-you notes** to volunteers a few days after the event