Growing a JGS: ORGANIZATIONAL TOOLS

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When a JGS first begins, there are often not enough people to take on multiple functions, so one or two people may coordinate presentations. As you build more of an organizational structure, create a website and perhaps use an email program, the number of people doing different functions grows. Many of the tasks in preparing for a presentation are sequential and each person needs to be aware of their tasks and when they are to be completed. Some organizational tools will ease the process.

There are two forms our JGS has found useful in this process as we distributed tasks more widely and required more coordination.

Speaker Agreement
The speaker agreement is where we begin our process approximately 45 days before the presentation. It includes the information that we need to receive from the speakers and what we need to communicate to them. It is sent to them for information and their agreement. The purpose of this document is not only to have a clear understanding with the speaker, but also to have all the key information in one place for others in our JGS who work with the information contained within it.

Included in this form is the following:
Synopsis of the talk-for use in the press release
Bio –for use in the press release
Honorarium – if to be paid and in what amount
Address/contact info – to send honorarium to
Handouts – if provided and when they will be available
Permission to record – any restriction on how long it can be posted and where it can be posted, we post only on a member page
Start time and when they should sign in
Zoom link to sign in to

Note that for in-person presentations we will request information on the type and age of computer as that affects the cable attachment to the projector. Newer computers may require different cables. If there is uncertainty, speakers should send or share their presentations electronically so that they can be operated from one of our familiar computers. Presenters can also bring a flash drive as another back-up plan.

The core steps in our process are the following:

1) **Select program** and coordinate with speaker on details
2) **Zoom meeting setup**
3) **Send form to speaker** to document agreement (includes Zoom link)
4) **Draft press release** from speaker form
5) **Set up website event** using press release
6) **Send press releases** tied to publication dates and provide to JGDG
7) **Send first email** announcing the program to entire list
8) **Code RSVPs to email software** throughout this period
9) **Send second email** to entire list
10) **Send final emai**l to those who RSVP'd

The speaker agreement form is sent to the speaker and we allow a week for its receipt, and then the publicity person does a press release.

The draft press release is shared with the person who sets up the event on the website who incorporates that information within the event.

The person in charge of publicity sends the press release to groups that include Hadassah and our local Jewish paper and gets the event on a Jewish community calendar. We also connect with the Jewish Historical Society for an email blast. In the ten days prior to the event, she sends two notices to the JewishGen Discussion Group. You can also send to the IAJGS Events calendar by filling out this form.

Twenty days before the program, we send our first email through our email program and that is followed up with a second ten days before.

As RSVPs come in another person codes them on the email program as the final email will just go out to those who RSVP'd.

Our website sends out an automated notice three days before to RSVPs and we send a final email from our email program one day before to this same group.

Note that there are five broad areas after a program is selected that may involve multiple people although some people may do several of these tasks:

Speaker form development
Publicity
Website event set up
Coding RSVPs if you use a separate email program
Emails to members and interested persons inviting them to attend

Additionally, the person who coordinates the event on the day of the event, usually the President or Vice President, creates a script which details the role of the various people on event day and details the steps to use the technology.

Building a Schedule

Each of our talks has several supporting tasks. We automated a table in Excel to calculate the target date of each of those tasks. When the presentations are established for the year, we enter them into the table to generate the dates of tasks based on how many days before the event they occur.

Topic	**Date of Talk**	**3rd email**	**2nd email**	**1st email**	**post event**	**Press Release**	**Send Speaker Form**
	# Days Prior	1	10	21	30	37	45
Talk 1	23-Jan-22	22-Jan-22	13-Jan-22	02-Jan-22	24-Dec-21	17-Dec-21	09-Dec-21
Talk 2	06-Mar-22	05-Mar-22	24-Feb-22	13-Feb-22	04-Feb-22	28-Jan-22	20-Jan-22

We then enter the action into a calendar consisting of the date followed by each action step – Speaker Form, Press Release, Website Event, Publicity, E-mails and Presentation. It allows for a visual representation of the sequential and interrelated tasks. As the calendar elapses it is our reference to make sure that the necessary actions have occurred. See *Planning Calendar* on this webpage for a spreadsheet that you can download for use in your organization.