

Project Planning and Marketing Worksheet

NOTE: TAAR has adopted a business approach to programs and other Association activities. As a part of the process, the Directors ask staff and volunteers to plan each event and program carefully. The administration of any project requires that a form be completed and filed in the TAAR office prior to the final approval for each program service or event. Thank you for your cooperation.

Project Background:

Name of Project or Event: _____

Association Member Chairing Event: _____

Association Staff Manager: _____

Briefly describe the project and its value to the Association and/or its members.

Project Details:

1. Date Scheduled _____
2. Venue of Event _____
3. Hours _____
4. Anticipated Number of Attendees _____
5. Specific Audience or Target Market _____
6. Phrases or concepts to be used in marketing the event or product.

7. Marketing techniques employed and the name of the person responsible
 - a. Brochure _____
 - b. Internet/Paragon Announcement _____
 - c. Media/Press Release _____
 - d. Direct Mailing (to whom?) _____
 - e. Office Meeting Announcements _____
 - f. Direct Contact _____
 - g. Other (Please specify) _____
8. Estimated Costs for the Project
 - a. Facility _____
 - b. Speaker/Entertainment Fees _____
 - c. Coffee, Equipment, Rental, etc. _____
 - d. Food _____

- e. Transportation and/or _____
 - f. Printing/Advertising _____
 - g. Hours of Staff Time _____
 - h. Hours of Volunteer Time _____
9. Estimated Income _____
- a. User fees _____
 - b. Donations _____
 - i. Amount _____
 - ii Donor Names _____
 - c. Manager of fund raising efforts _____
 - d. Other income _____
10. Estimated Profit/Loss _____

Please Note: This form will be completely filled out as a joint effort between the project chairman and the staff member who will manage the project. If fund allocations are involved and if those allocations are not in the annual budget, they may very likely be directed to the Budget and Finance Committee by the President of the Association. In order to approve an allocation of Association resources of money, staff and volunteer time, the Directors will want to be assured that background research and planning has been completed prior to implementation of the event. Please remember also that there is no automatic funding for any project, and the Board of Directors must approve all allocations prior to spending.