

## Partnership for Philanthropic Planning Branding Worksheet

|   |              |  |                 |              |
|---|--------------|--|-----------------|--------------|
| <b>Council print materials:<br/>What we have (and quantity)<br/>and how these can be used</b> | <b>Tasks</b> | <b>Lead _____<br/>Council Member(s)<br/>Assigned</b> | <b>Due Date</b> | <b>Notes</b> |
|   |              |  |                 |              |
|   |              |  |                 |              |
|   |              |  |                 |              |
| <b>Council print materials:<br/>What we need to create (and<br/>quantity)</b>                 | <b>Tasks</b> | <b>Lead _____<br/>Council Member(s)<br/>Assigned</b> | <b>Due Date</b> | <b>Notes</b> |
|   |              |  |                 |              |
|   |              |  |                 |              |
|   |              |  |                 |              |
| <b>Event Materials:<br/>What we have (and quantity)<br/>and how these can be used</b>         | <b>Tasks</b> | <b>Lead _____<br/>Team Member(s)<br/>Assigned</b>    | <b>Due Date</b> | <b>Notes</b> |
|   |              |  |                 |              |
|   |              |  |                 |              |
|   |              |  |                 |              |
| <b>Event Materials:<br/>What we need to create</b>  | <b>Tasks</b> | <b>Lead _____<br/>Council Member(s)<br/>Assigned</b> | <b>Due Date</b> | <b>Notes</b> |
|   |              |  |                 |              |
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|   |              |  |                 |              |

| <b>Legal Applications</b>                                 | <b>Tasks</b> | <b>Lead _____<br/>Council Member(s)<br/>Assigned</b> | <b>Due Date</b> | <b>Notes</b> |
|---|--------------|--|-----------------|--------------|
| <i>Name DBA</i>   |              |  |                 |              |
| <i>Contracts</i>  |              |  |                 |              |
| <i>Insurance</i>  |              |  |                 |              |
| <i>IRS</i>  |              |  |                 |              |
| <i>Policies</i>   |              |  |                 |              |
| <i>LEAVE A LEGACY Agreements</i>                          |              |  |                 |              |
| <b>Marketing</b>  | <b>Tasks</b> | <b>Lead _____<br/>Council Member(s)<br/>Assigned</b> | <b>Due Date</b> | <b>Notes</b> |
| <i>Ads</i>  |              |  |                 |              |
| <i>Press Releases/Press kits</i>                          |              |  |                 |              |
| <i>PowerPoint Presentations</i>                           |              |  |                 |              |
| <i>Newsletter</i>   |              |  |                 |              |
| <i>Annual Report</i>                                      |              |  |                 |              |
| <i>Booth Materials</i>                                    |              |  |                 |              |
| <i>Merchandise/Incentives</i>                             |              |  |                 |              |
| <i>Key Messages/Boilerplate</i>                           |              |  |                 |              |
| <i>Marketing Collateral (Brochures,<br/>Flyers, etc.)</i> |              |  |                 |              |
| <i>Educational Materials</i>                              |              |  |                 |              |
| <i>Development Materials</i>                              |              |  |                 |              |
| <i>LEAVE A LEGACY Materials</i>                           |              |  |                 |              |

| <b>Web</b>   | <b>Tasks</b> | <b>Lead _____<br/>Council Member(s)<br/>Assigned</b> | <b>Due Date</b> | <b>Notes</b> |
|--|--------------|--|-----------------|--------------|
| <i>Design updates</i>  |              |  |                 |              |
| <i>URL update</i>  |              |  |                 |              |
| <i>Other (e.g., LEAVE A LEGACY)</i>                                      |              |  |                 |              |
| <b>Operations</b>  | <b>Tasks</b> | <b>Lead _____<br/>Council Member(s)<br/>Assigned</b> | <b>Due Date</b> | <b>Notes</b> |
| <i>Phone Greeting/Voice Mail</i>   |              |  |                 |              |
| <i>Auto E-mail Signature</i>   |              |  |                 |              |
| <i>Signage</i>   |              |  |                 |              |
| <i>Stationary and Print Collateral</i>                                   |              |  |                 |              |
| <i>Accounting (checks, expense receipts, bank accts)</i>                 |              |  |                 |              |
| <i>Forms</i>   |              |  |                 |              |
| <i>Other</i>   |              |  |                 |              |
| <b>Partner Materials:<br/>What we have and how these<br/>can be used</b> | <b>Tasks</b> | <b>Lead _____<br/>Council Member(s)<br/>Assigned</b> | <b>Due Date</b> | <b>Notes</b> |
|  |              |  |                 |              |
|  |              |  |                 |              |
|  |              |  |                 |              |
| <b>Partner Materials:<br/>What we need to create</b>                     | <b>Tasks</b> | <b>Lead _____<br/>Council Member(s)<br/>Assigned</b> | <b>Due Date</b> | <b>Notes</b> |
|  |              |  |                 |              |
|  |              |  |                 |              |
|  |              |  |                 |              |

| Other | Tasks | Lead _____<br>Council Member/s<br>Assigned | Due Date | Notes |
|-------|-------|--|----------|-------|
|       |       |  |          |       |
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