Description of Effort: This is a simple tool used as the basis for budgeting seminars, conferences and other special events by the chapter.

Need Addressed: Budgeting and finance seems to be an area with which many board and/or ad hoc committee members would like assistance and this simple form helps them keep track of potential revenue and expenses. It also can assist with pricing, once the variable and fixed costs are determined, by allowing the committee to plug in alternate pricing models.

Does this effort align with your chapter mission? Yes

Does this effort align with ASTD’s mission? Yes

Target Audience: Board/committee members working on event planning

Costs/Resource Use: N/A

How did you implement: Provided to the board members with overall responsibility for the event(s); short training on use provided upon request; VP Finance available to answer questions / review as appropriate.

What were the Outcomes: The form seems to help committee members (especially those new to the "events" function) keep track of the things that may cost money. Helps ensure the planning is sufficiently inclusive that the event actually makes money.

Lessons Learned: Get the tool into the right hands early in the process. Have the board finance person(s) provide assistance as needed.