



Marketing, Media, Integrated Communications & Public Outreach

## PROJECT INTAKE FORM

Thank you for considering our firm for your project / campaign. This form is designed to help us understand the scope, objectives, and your expectations, or that of an RFP and will help ensure a tailored and effective proposal. Please provide as much detail as possible.

### Organization Information

Company/Organization Name: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Website: \_\_\_\_\_

Brief Description of Your Organization: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### What Prompted You to Seek Marketing or Community Engagement Support at this Time?

- New Initiative
- RFP Pursuit
- Ongoing Strategic Support
- Growth / Expansion
- Event or Activations
- Rebrand or Repositioning
- Other: \_\_\_\_\_

### Primary Objectives (check all that apply):

- Brand Awareness
- Multicultural Outreach
- Internal Communications
- Community Trust and Visibility
- Event Support
- Other: \_\_\_\_\_
- Lead Generation
- Reputation Management

### Target Audience

Primary Audience: \_\_\_\_\_

Secondary Audience: \_\_\_\_\_

Key Demographics or Decision-makers: \_\_\_\_\_

Geographic Focus:  Local  
 Regional  
 Statewide  
 National

### What are You Currently Doing?

- Website
- Public Relations
- None
- Social Media
- Paid Advertising
- Other: \_\_\_\_\_
- Email Marketing
- Events

What is working well? \_\_\_\_\_

What feels misaligned or missing? \_\_\_\_\_

### Services of Interest (check all that apply):

- Integrated Communications and Market Planning
- Community Engagement and Outreach
- Event Marketing
- Strategic Partnership Development
- Social Media strategy
- Media Buys
- Multicultural Engagement and Outreach
- Focus Groups
- Translation Services
- Speaking Engagement
- Other: \_\_\_\_\_

Describe the support you believe you need: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



## Marketing, Media, Integrated Communications & Public Outreach

### Timeline

Desired Start Date: \_\_\_\_\_ RFP Due Date (if applicable): \_\_\_\_\_

Key Milestones or Events: \_\_\_\_\_

### Investment Alignment for Professional Services

Our firm partners with organizations through retainer-based engagements with a minimum six (6) month commitment. For clients seeking project-based support, services are available on an hourly basis at \$150/hour for government agencies and \$175/hour for private and corporate organizations..

#### Typical monthly retainer investment range:

- \$5,000-\$12,500 depending on scope

#### This includes:

- Strategy and planning
- Brand positioning and messaging
- Campaign development
- Community engagement strategy
- Project management
- Reporting and consulting

#### Please indicate your level of alignment:

- We understand and align with this range
- We would like tiered options
- We would like to discuss scope adjustments

### Marketing and Activation Budget

Separate from professional services.

Used for:

- Paid advertising
- Event Fees
- Influencers and Partnerships
- Media Placements
- Sponsorships
- Printing and Production
- Photography/Video

#### Estimated marketing budget:

- Under \$5,000
- \$5,000-\$10,000
- \$10,000-\$25,000
- \$25,000-\$50,000
- \$50,000+
- Not Determined

### Decision-Making

Who will approve the proposal? \_\_\_\_\_

Who will be day-to-day contact? \_\_\_\_\_

Desired timeline after proposal review? \_\_\_\_\_

### FAQs

#### Why is there a six-month minimum engagement?

- *Effective marketing and community engagement require time to develop strategy, implement thoughtfully, and measure impact. A six-month commitment ensures alignment, continuity, and meaningful results.*

#### What does the professional services retainer include?

- *Our retainer covers strategic planning, messaging and brand positioning, campaign development, content creation, community engagement strategy, project management, and ongoing consulting support.*

#### What is the marketing and activation budget used for?

- *This budget funds external execution costs such as advertising, sponsorships, event fees, printing and production, media placements, photography, and other third-party vendors.*

#### Can you work with smaller budgets?

- *We can recommend phased or scoped approaches depending on your objectives. Our standard retainer range reflects the level of strategic involvement required to drive measurable impact.*

#### Do you manage vendor payments?

- *Marketing and activation budgets may be paid directly by the client or managed by Ericka Aviles Consulting on your behalf, depending on the structure of the engagement.*