

# FUNDRAISING, SPONSORSHIP & THE ROLE OF THE BOARD



Presentation by Karen Ball

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## ON THE PLATE

1. Outline of membership, events, grants and sponsorships and how they can work for your organization
2. Overview of how sponsorship works
3. In-depth step by step guide to approaching, securing and growing sponsorships



# FUNDRAISING – OPTIONS AND OVERVIEW

Memberships	Events	Grants	Sponsorships
<ul style="list-style-type: none"> <li>• Where people make a contribution of money to an organization to become affiliated with it for a set period of time -- usually a year.</li> <li>• Ongoing with regular campaign pushes</li> <li>• Set fees or dues – can be based on different membership levels</li> </ul>	<ul style="list-style-type: none"> <li>• A planned or social occasion to generate financial support for a charity, cause or other enterprise.</li> <li>• Periodic or annual</li> <li>• Ticket sales (event registration fees), event sponsorships, in-kind donations, auctions, draws</li> </ul>	<ul style="list-style-type: none"> <li>• a sum of money given by an organization, especially a government, for a particular purpose.</li> <li>• Annual or bi-annual</li> <li>• Competitive</li> <li>• Application based on eligibility and criteria based decision making</li> </ul>	<ul style="list-style-type: none"> <li>• Cash or in-kind investment in return for tangible business benefit</li> <li>• Ongoing based on opportunity and need</li> <li>• Transactional investment in cash and benefit return</li> </ul>

## MEMBERSHIP BENEFITS

- Built-in cultivation for larger potential donations
- Built-in volunteer pool to draw from
- Encourages regular communication with core community
- Builds strong sense of ownership from core community
- Creates a social network amongst members
- Regular, undirected annual cash flow
- Role of the Board?

## EVENT BENEFITS

- Focused time-based effort
- Can be entirely volunteer driven
- Ability to cultivate relationships with potential future donors
- Ability to strengthen relationships with existing donors
- Potentially undirected revenue
- Role of the Board?



## GRANT BENEFITS

- Potential to support both one-off projects and operations
- Can support ad-hoc groups, organizations, or individuals
- Can be renewed annually
- May convey stability to other funders
- Deepens relationship with sectoral capacity builder
- Role of the Board?

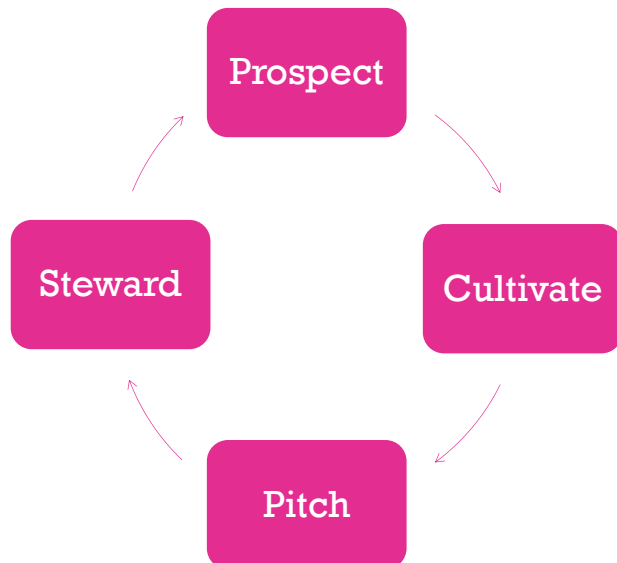


## SPONSORSHIP BENEFITS

- Opportunity based
- Customizable to attract cash, in-kind or both
- Builds momentum and trust from other potential sponsors
- Relationship based, allows you to build from and expand your existing network
- Scalable and renewable
- Deepens awareness and understanding of your organization and its mandate



## SPONSORSHIP



## DEVELOPING YOUR LIST

Prospect

- Board members – past and present
- Suppliers
- Clients – past and present
- Current supporters
- Staff
- Members
- Who Else?



## ARE YOU ALIGNED?

Prospect

- What do they sell or do?
- What else do they support?
- What is their current marketing need?
- Who do they want to talk to?



## IT'S NOT ONLY OIL & GAS

Prospect

- Real Estate Developers
- Hardware Stores
- Shopping Malls
- Restaurants
- Clinics
- Hotels

Other Sources: Chamber of Commerce, Donor Walls, LinkedIn, etc...



## MAKING CONNECTIONS

Cultivate

- Who can make introductions/cultivate prospects with you?
- Are there events you can invite or bring them to?
- Are there professional development opportunities they can be part of?
- Are there volunteer opportunities for their employees?
- Where do they network?
  
- Role of the Board?



# TRANSACTIONAL BENEFIT

Pitch

You are providing your Sponsor Partner with:

- Access to a target market
- Meaningful interaction between business, customers, clients, employees, stakeholders
- The ability to expand personal reach through social media and word of mouth
- A shared value alignment within which to deliver a perfectly timed message



## EXCERCISE

Bob's Automotive and Recreational Vehicles is turning 50 this year. Bob's is a retailer specializing in used truck sales and new RV, camper and trailer sales. Their dealership is located on the edge of the city off the QE2. They are interested in a sponsorship that can:

- Mark this important mile stone for them in a meaningful way
- Connect them to their target market: families & men aged 25 – 45
- Reflect the values of their owners and senior management who care deeply about building strong communities

### Consider

**How can you meet the needs of Bob's business objectives through a sponsorship?**

**Outline what benefits you will provide and how they will be delivered.**



## THE MEETING

Pitch

- Know your prospect's business objectives
- Have a 30 second pitch and questions prepared in advance
- LISTEN!
- Be open and flexible
- Agree to next steps
  
- Role of the Board?



## THE PROPOSAL

Pitch

- State the fit
- Outline the opportunity
- List returns on investment
- State the transaction

Also include: cover letter (personal), overview of organization, testimonies, marketing research, etc...





## FORMALIZING THE PARTNERSHIP

Pitch

- Negotiate and be flexible to close the deal
- Create a sponsorship agreement
  - Outline of deliverables for both partners
  - Deadlines (if any)
  - Contact information
  - Signature
- Identify who needs to be engaged from the sponsor's organization
- Share the information with those that need to know inside your organization and keep great records!



## DELIVERING

Steward

- Bring your sponsor in as a partner – let them get to know you better
- Provide a final report outlining the deliverables and impact
- Follow up with a meeting to talk about the future
  
- Role of the Board?



Steward

**VALUE YOUR PARTNERS AND KEEP THEM FOR  
YEARS TO COME**



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