

# **MONEY, VOLUNTEERS, SKILLS: YOUR GUIDE TO SEEKING SPONSORSHIP**

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## INTRODUCTION

### What is the guide for?

*Money, Volunteers, Skills: Your Guide to Seeking Sponsorship* has been developed to provide Landcare groups with ideas on how to source and secure sponsorship and offers tools to help with this process.

Sponsorship means any form of support that benefits the group including financial, in-kind and volunteer contributions. Sponsorship could come from local businesses; community members; corporate organisations; philanthropic trusts and foundations; and government.

For some, the guide may be a reminder of some good ideas and practices that you already know but are useful to revisit; for others it may contain new and untried approaches; and for most it is probably somewhere in between. It is not meant to be prescriptive or one-size-fits all – the diversity of approaches taken by the Landcare community is one of our core strengths.

The guide takes you through the process of getting ready, taking action and safeguarding your successes. It is also a resource to be dipped into and adapted to your needs and circumstances. Even if you only take a few ideas to try or use just one tool, the guide has served its purpose.

The guide has been developed in consultation with Victorian Landcare Networks and, where possible, the content and examples have come from their knowledge and experience.

### Working with the guide

This guide takes you through a process that requires background thinking, information gathering and decision making *before* you approach a potential sponsor.

### The process includes:

- ✓ Developing your **statement of purpose**
- ✓ Setting your **sponsorship goals** under **key result areas**
- ✓ Assessing **your capacity** to attain your goals
- ✓ Identifying **what you have to offer** and seeing them as your **assets**
- ✓ **Prioritising** and **valuing your assets**
- ✓ Understanding what a **potential supporter might want** from you
- ✓ **Packaging** your assets so you are meeting your needs and making it clear what the benefit is to a potential sponsor
- ✓ Thinking about **who you know** and how they could help you
- ✓ Choosing **your targets** and doing some **background research** on them.

When putting together your sponsorship plan you'll:

- ✓ Prioritise your goals;
- ✓ Choose the strongest; and
- ✓ Show how each goal will be approached and achieved.

Your preparation and planning will also produce valuable content to enable you to refine your existing communication and promotional materials and develop new ones. The guide offers advice and tools to help you do this.

The next part of the guide provides advice on making the approach to a potential sponsor, what you may encounter and some follow up actions and responses you could try.

The final part of the process is safeguarding your success and the guide offers some suggestions to help secure your sponsorship now and ensure it continues into the future.

In the document you'll find **Tools** – practical templates and examples from Landcare groups and networks. These tools are available for you to download and use. **To locate these tools quickly click on the hyperlink when the document is mentioned.**

## Section 1

### GETTING READY

Individuals and organisations that are successful with sponsorship tend to have three traits in common:

1. They know where they are
2. They know where they want to be
3. They have a plan for getting there.

It's important to start most endeavours with a plan and seeking sponsorship is no exception. It doesn't matter whether it's a stand-alone plan or connected to your business plan. It could be called a 'fundraising plan' or a 'road map' – in the guide it's referred to as a sponsorship plan. The most important thing is that it guides your sponsorship-seeking activity.

Before developing a plan and seeking sponsorship you need to know some things about your group – your aspirations, capabilities and connections. In this section we'll focus on approaches and tools to help you structure your thinking, equip you to write a good plan and seek sponsorship effectively.

Before you begin, it's important to agree on who is responsible for coordinating the planning process. This person is not doing all the work, but responsible for collating input and making sure the process meets the agreed timelines. Appropriate resources need to be allocated in terms of time, commitment and finances to support this person and the process.

### WHO ARE YOU AND WHAT DO YOU WANT?



*Success in gaining sponsorship starts with a plan and in order to develop your Sponsorship Plan you need firstly to understand who you are (your Statement of Purpose) and what you want (your Goals).*

#### Your statement of purpose

All organisations, no matter how small, need purpose and direction in order to achieve their aims. This is the starting point for all your work, whether it's on-ground activities, engaging others or seeking sponsorship. Larger organisations often have vision, mission and value statements, while smaller organisations might combine these into a single statement of purpose document.

#### Tool: Statement of Purpose

The hyperlink above has a template to help you develop your group's statement of purpose, along with an example from Bass Coast Landcare Network.

#### What do you want to achieve? (Goals)

What outcomes do you hope to achieve? What are your short, medium and long-term goals?

You can approach this by brainstorming ideas.

Goals might include:

- ✓ Expansion of existing projects
- ✓ New project ideas (try and think outside the square when thinking of projects)
- ✓ Improving your promotional material
- ✓ Making connections with other groups/ networks to deliver on-ground works
- ✓ Expanding (or contracting) services.

Alternatively you can just focus on your group's goals on gaining sponsorship.

At this brainstorming stage dream large and don't exclude anything, but when you document your goals be succinct and list the goals in terms of clear outcomes. It is useful to divide the big picture of sponsorship goals into a number of areas and list your goals under each.



*Organise your goals under key result areas for clarity.*

#### **Tool: Setting your groups goals**

The hyperlink above has a template you can follow to help develop your group's goals. For an example see pages 5-10 of Bass Coast Landcare Network's Strategic Plan.

These goals will be tested during the remainder of the *Getting Ready* process. When putting together your plan you'll revisit them and be more precise about how they can be achieved by focusing on specific strategies, actions, timing, people and measures. This is when goals will be prioritised and some will be put on the back burner or discarded so you can concentrate on the priorities.

#### **What's your capacity to achieve? (Reality check)**



*Review your capacity to achieve your goals – be realistic and use the S.W.O.T analysis tool to get a clear picture of where your group is situated at this moment.*

It's important to be realistic about what you can achieve without being self-limiting or undervaluing your potential. Spend time reviewing what's on your plate – your current projects and commitments – and what resources you have available now to meet current commitments and take on future activities.

There is a tool that can help frame this discussion by focusing on your (S)trengths, (W)eaknesses, (O)pportunities and (T)hreats – S.W.O.T. Doing a S.W.O.T analysis can help you realise what you have to offer and also help identify and overcome potential obstacles before they arise.



*For strengths think about things such as your knowledge, experience, local connections and the skills and commitment of your members.*

#### **Tool: S.W.O.T**

The hyperlink above has a template you can follow to help you develop your group's S.W.O.T along with an example from Goulburn Murray Landcare Network.

Another useful tool is an Activity Schedule, a spreadsheet (or similar) that includes timelines for all scheduled activities and commitments the group knows about, along with people involved in delivery. Activities may be related

to existing project commitments; current sponsor deliverables; all meetings and events; timelines for communications (such as your newsletter) and so on. This gives you an at-a-glance picture of what you are doing and when.

### **Tool: Activity schedule**

The hyperlink above has a template you can follow to help you develop your group's activity schedule along with an example from Heytesbury and District Landcare Network's Annual Works Plan.

## **THE GIVE AND TAKE**

If you used the S.W.O.T tool in the previous section, you would have identified your strengths, including things such as your knowledge, experience, local connections and the skills and commitment of your members. These are all valuable assets that contribute to your capacity to achieve and deliver agreed outcomes. The S.W.O.T tool also helped you to look at weaknesses or areas where you need to improve your capacity.

Keep both your strengths/opportunities and weaknesses/threats in mind as you now start to think about:

- ✓ What you have to offer (your assets)
- ✓ How to prioritise your assets
- ✓ How you could put a value on your assets
- ✓ How to frame your assets as products that supporters can relate to
- ✓ What you need from a supporter in exchange

### **What do you have to offer? (Your assets)**

Some of the things you do (projects, programs and services) are easier than others to turn into products, but most things can be framed as valuable and worthy of support in some way.

Be creative when thinking about what you are selling. Don't take it for granted that a potential sponsor can see value where you can – it needs to be made very explicit. This is a process of looking at what you have and framing it as something that relates to a sponsor.



*List all that you have to offer a potential sponsor – these are your group's assets and they can be framed in a way that is attractive to a sponsor.*

This might include:

- ✓ Media coverage. You can either agree to write media releases yourself (your sponsor may want to review and sign off before they go out) or they can be joint media releases. Additionally, if the partnership is interesting enough you can investigate placement of stories in publications relevant to your project and also your sponsor/s
- ✓ Public relations (PR) activities and events. Often when attracting new partners or sponsors you need to find an angle that gets them interested. A PR activity when you launch the event is a good way to impress your investors, and attract media coverage
- ✓ Signage - A cost effective way to get your sponsor's name out there. If possible include an estimation of the sign's value – for example, approximately 10,000 people drive past on the highway everyday and see your sign
- ✓ Website - Establishing brands for major projects can be useful and being able to do the following for your partner on your website is important:
  - Providing recognition within the media area of your site
  - Offering an overview in the partner's section of the site
  - Telling a story about the benefits of having that partner involved and achievements so far
  - Focusing on the key people in a sponsors organisation.

It's important to highlight that Landcare offers community value as well as environmental value – this can be attractive to supporters as it meets environmental as well as social priorities they may have and want to report to their stakeholders.

Also remember to include things such as your access to and reputation within the community as assets and value them appropriately. For example, access to 1,000 land holders in the region through membership of the network, all of who receive the group's newsletter.

### **Tool: Assets list**

The hyperlink above has a template you can follow to help you develop your group's assets list, along with an example.

### **Prioritising and valuing your assets**

Now you have listed all of your assets, start to think about how important and valuable each of those assets are, both from your perspective and also from the perspective of a possible sponsor.

The process of prioritising your assets can help you better shape your sponsorship goals and help you understand how the priorities of a potential sponsor fit in with your own. This process will also help you to put a dollar value on your assets.

When thinking about the value of your assets the following formula might help:

**VALUE = *How much it costs you to deliver + additional benefits***

*How much it costs you to deliver* is an estimate of all your upfront costs including labour costs for the volunteer hours required. You should also consider how much you will charge for project coordination. (Landcare groups and networks generally factor between 10 to 25 per cent for project coordination depending on the amount of work required).



*Be upfront about the fact that whilst you depend on volunteers you also need funds for operational costs including a coordinator.*

*Additional benefits* are all the added elements that come with what you are providing such as the brand value, goodwill in the community and so on.



79% of people recognise the Landcare hands.

This is not an exact science and will vary depending on the context, but it will help to give you confidence in realistically valuing what you have, asking for the right amount and creating a fair exchange with a sponsor.

This process should involve consultation among the group and with trusted stakeholders with knowledge of what you do and (if possible) knowledge of what sponsors are looking for – for example someone who has had corporate sponsorship experience. Seek advice from other Landcare groups that have already gone through this valuation process and were successful in gaining support.

It may also involve assessing the give and take with existing sponsors and determining whether there is a fair exchange. If not, this should be identified as a goal – to review existing sponsorship arrangements and if/when it is possible renegotiate the terms.

## **Skills and capacity support**

In addition to valuing what you're offering, it's useful to identify what your group needs or wants that isn't directly related to the delivery of projects, programs or services.

This may be skills and capacity that a sponsor could provide through in-kind contributions, such as:

- ✓ Providing some mentoring about how to get additional corporate sponsorship for the group, and perhaps making introductions to relevant associates or suppliers
- ✓ Offering an in-kind training budget as part of the partnership so your group members can participate in relevant training
- ✓ Providing graphic design/web development/human resources/marketing/financial expertise
- ✓ Use of their meeting facilities and equipment such as rubbish bins, forklifts, bob cats and so on.

These opportunities will emerge when dealing with a potential sponsor when talking about your project.

## **What might a potential sponsor want from you?**

The work you've done in identifying your assets and valuing them stands you in good stead to now think about what a sponsor may be looking for and bundle or package your assets into environmental products or projects that sponsors can relate to.

You can create different asset combinations or packages depending on your audience. Some potential sponsors will understand the work you do and there will be less need to package - so long as there is a fair exchange - but for most you will need to do this.



*Be as clear as you can in identifying what the benefit is to the environment, to the species that live there, to the local community and to the broader community.*

## **Tool: Environmental products and projects**

The hyperlink above has an example of how assets can be combined into different packages as an environmental product or project. See pages 10 and 11 of the Leigh Catchment Group Ballarat to Barwon Project Prospectus.

Sometimes potential sponsors will not know what they want from you, apart from an opportunity to do some environmental good, or they may have an idea that is not practical – you'll need to provide some suggestions and guide them.

Others will have a very clear idea of what they want and you will need to work together to ensure these are aligned with what you can provide – this needs to be decided right from the beginning to avoid misunderstanding.

## **Tool: What a sponsor might want from you**

The hyperlink above has documents that will help you.

Be prepared for some potential sponsors to want very little! They may be interested in giving a donation through a staff giving programs or corporate or philanthropic trusts, and all they need to know is that you are reputable and that the money will go where you say it will. A business plan often shows this type of organisation all they need to know about the group's reputation. In this case be sure to:

- ✓ Explore options for support of things you need but are harder to attract funding for
- ✓ Stay in touch even if you don't have to – be sure to communicate progress to increase likelihood of ongoing and future support.

Also be prepared for some potential sponsors wanting more than you can provide. If there is a big gap between what they are seeking from you compared to what you are offering, be careful. If what they are asking for is not something you have or can deliver, suggest more achievable alternatives, or as a last resort, walk away. It's better not to over-commit than to promise and under-deliver.

This is where all your Getting Ready work will come together – it helps you be clear about what you can and will do, and what you can't do.

## Section 2

### WHO DO YOU KNOW?

As in many other aspects of life, the quality of your relationships has a bearing on your success and wellbeing as a group or network. Sometimes they are hard work but building and maintaining good relationships with existing and potential sponsors saves a lot of time and often yields dividends in unexpected ways.

#### CONTACTS MAPPING

No group is an island. Yet often we become so familiar with our environment that we stop seeing the opportunities right on our doorstep. One important source of opportunities comes through *who you know*. It's important to regularly review the list of individuals and organisations that your network has a link to and think about how you can work with them.



*Identify relationships with individuals or organisations that will champion your cause and help to create opportunities for you to achieve.*

You can do this informally through a brainstorming session listing all of your current relationships and connections (formal and informal), the nature of the relationship and how it might be improved and/or be able to assist you. Also brainstorm potential relationships such as possible supporters; individuals that could make connections; and other groups or networks that you could partner with to make a pitch.



*Think about organisations (including other groups and networks) that you could partner with to develop and deliver a pitch.*

This helps you map out where your relationships with partners and stakeholders are now and identify where you need to put some energy. If you are not ready to classify your contacts in terms of the quality of the relationship, just use this template to note them down in one place.

#### Tool: Relationship / partnership map

Follow the hyperlink above to help you develop your group's relationship or partnership map, see which one suits your group.

#### CHOOSING YOUR TARGETS



*When thinking about potential sponsors, start local and work your way out.*

## Who can you relate to?

Look through your contacts list (or map if you've done it this way) and from this make a new list by asking:

- ✓ Which of our current sponsors (or clients if you offer fee-for-service) would consider increasing or expanding their support? Ideally this process will occur before the sponsorship agreement is due to be renewed
- ✓ Who do we know already who might become a sponsor? This may be a local supplier or service provider who could be connected to a larger state wide or national chain
- ✓ Who could we identify as potential sponsors?
- ✓ Who do we know that might connect us to potential sponsors – individuals and organisations, especially your current sponsor's can open doors and make introductions?

What you'll have now is your target list of potential sponsors. Some are businesses you know, and some you don't know directly, but know someone who can help you get a foot in the door; some might be trusts and foundations that support environmental and community based initiatives; some may be government organisations (from local to federal) with both the usual and the unusual or one-off sources of funding; and some are individuals and organisations that will support you through their connections.

## Do your research and set concrete targets



Research is very important. Always research the organisation you are going to approach.

Take your target list of potential sponsors and research them.

Find out:

- ✓ What they do (their core business)
- ✓ Where they are located (head office and all their sites and facilities)
- ✓ What their vision, mission, values and statement of purpose is (does it match with yours?)
- ✓ Who and what they've supported in the past
- ✓ Whether they have a donation/sponsorship/community investment policy (this will be a key to how you approach them)
- ✓ Best contact for the organisation
- ✓ Best time to approach (funding cycles)
- ✓ If a corporate, do they have a trust or foundation that you can approach (in addition to making a sponsorship approach?) Do they have a staff giving program? Do they have a staff volunteering program?

You might consider keeping an electronic profile on each target that everyone can access, or put all the information into a single table or spreadsheet with headings based on the list above as a starting point. This way you can build your knowledge over time and use this as a place to record your interactions with the organisation when you approach them.

This is a process of information gathering that will be important in preparing your approach. You'll also start to get an idea of what you could put forward that they may consider supporting – it's important not to assume or be fixed in your thinking about this, but it is useful to have a starting point when you do approach them. For example, if looking at a potential corporate sponsor you might consider the types of projects or programs they would be interested in based on their values, location and core business. You may also think about in-kind opportunities.



*Don't put all your eggs in the one basket – be sure to select targets from a range of areas.*

For some trusts, foundations and government grants you need to find out their funding and application guidelines and then complete the application before the submission deadline. If you are looking at making a submission, it is well worth giving the trust or foundation a call so they know you are interested and will expect something from you. This is a good opportunity to talk to the funders about your project idea and make sure it fits their guidelines.

You have decided on targets based on your group's knowledge and networks, but it is also worth scanning for funding opportunities that you may have missed. The local newspaper and internet is a good source.

**Tool: Funding source guide**

There is a funding sources guide available to help you find funding for your group as well as some tips for writing grant applications. Click on the hyperlink above to find these documents.



*Keep your ear to the ground to hear about opportunities and be proactive when you do. For example a corporate may be setting up a factory in your region – they need to know about you sooner rather than later.*

## Section 3

### DEVELOPING YOUR SPONSORSHIP PLAN

All of the *Getting Ready* work done so far is valuable, but it also helps you to develop a well-formed sponsorship plan.

When you've finished all the thinking work, your sponsorship plan draws on the information and brings it all together.

Your plan is your:

- ✓ Statement of purpose
- ✓ S.W.O.T outcomes
- ✓ Goals
- ✓ Relationships



*Your Sponsorship Plan may stand alone or may be a section in your business or action plan. You may have a preferred structure that you are more comfortable with – choose what works best for your group.*

Developing this into a sponsorship plan gives you the opportunity to add more detail on:

- ✓ Strategies
- ✓ Actions
- ✓ Timing
- ✓ People
- ✓ Measure

Having done so much of the background work, you can be very specific and include, for example, the names of contacts you will approach as entry points into target organisations and what you think they may be interested in supporting. Be sure to include details on who in your group is responsible for taking action, when and how you're going to check on whether the action has been successful.

#### **Tool: Sponsorship goal setting**

This tool will help you identify goals for seeking support that you can include in your sponsorship plan. Click on the hyperlink above to look at these tools.

#### **Tool: Sponsorship plan**

There are two templates you can follow to help you develop your group's sponsorship plan along with examples from Bass Coast Landcare Network. See which one suits your group. Click on the hyperlink above to look at these tools.

## Section 4

### RAISING YOUR PROFILE

The process you've followed in *Getting Ready* and putting together your sponsorship plan will help create effective and targeted communications as key tools in your sponsorship-seeking efforts.

The following is an approach to marketing communications for gaining sponsorship.

#### **Step 1: Telling your story**

Many sponsors want to connect with what you are trying to do and a good way of doing this is to tell your story - who you are, what you do and how they might engage with you. They want more than just the facts and figures, so keep this in mind when developing communications tools.

Develop a brief, a one-page document or brochure that outlines who you are and what you do. Don't get bogged down in details and facts. Focus instead on creating short, sharp sentences and add great images.

You may want to start with Landcare as a national movement, connecting to the credibility of the brand and all it stands for, and then talk about your region (your local story) and your successes (environmental and social). Your vision and statement of purpose should be prominent.

#### **Tool: Telling your story**

There is an example of telling your story from Bass Coast Landcare Network on pages 2 and 3 in the *Landcare Delivering Market Based Investment* booklet. Click on the hyperlink above to look at these tools.

#### **Step 2: Capability statement**

It can be valuable to create a second communication piece that goes into more detail about the work you do and what you have to offer -- your assets and environmental products. Include short case studies or testimonials featuring your existing sponsors; successful projects and programs; and the services you offer.

Make sure this document is easily adaptable for different funding sources to emphasise certain areas that you think may be of interest to them.

#### **Tool: Capability statement**

There is an example of a capability statement from Leigh Catchment Group on pages 2, 4, 6 and 11 of the Leigh Catchment Group Ballarat to Barwon Project Prospectus and associated case studies. Click on the hyperlink above to look at these tools.

#### **Step 3: Project briefs**

These are brief overviews of your projects to provide an interested party with more detail on what they might want to support. Include detail on overall outcomes so far (whole of project), specific outcomes (environmental and community), goals (long and short-term) and contributors (existing partners and supporters).

Use the same project to develop multiple project briefs for different sponsors by approaching it from different angles, such as icon species or habitats and overall outcomes. The work you did on putting together environmental products and projects in the *Give and Take* section will be useful to start filling in your project brief template.

#### **Tool: Project brief**

There is a template on the hyperlink above you can follow to help you develop your group's project briefs. Remember to include good photos that help to make the project come alive. Don't forget to make sure you've got the photographer's permission to use the images.

#### **Step 4: Proposal**

A proposal takes all three of the communication pieces already described along with other relevant group assets you've identified and shapes them into a document tailored specifically for a particular opportunity. You will only develop a proposal for a strong opportunity and it needs knowledge of the potential funding source. See *Choosing your Targets* for assistance on page 6.

Some potential sponsors may be very clear about what they will support and there is no need to package, but remember to cost in some of the big picture elements such as brand and your local reputation even if it is a relatively simple exchange.

When putting together proposals, include:

1. Your story – the high level overview of who you are
2. Capability statement – adapt this for different funding sources to emphasise certain areas that you think, or know through research or prior discussion, may be of interest to them;
3. Project briefs – again you may need to adapt these to emphasise certain elements that a sponsor is interested in. A proposal can include a number of different, relevant project briefs.

#### **Tool: Proposal**

Click on the hyperlink above to look at the template you can follow to help you develop your group's proposal along with an example from the Leigh Catchment Group Ballarat to Barwon project.

While this document is not generally sent until a lead has progressed and is expected by a direct contact in the organisation such as the sponsorship coordinator or community relations manager, it is good to have a template ready to go.



*Things change, so it's important to be able to update your promotional material. A graphic designer can put together a template for you but you need to specify that you want to be able to make changes. When you do need to print, print fewer rather than printing out large volumes that might end up in the recycling bin.*

#### **Prospectus**

It is rarely necessary for a group or network to develop a prospectus, but you may be asked to be involved in one. Generally a prospectus is developed for large scale and long term projects involving multiple partners, in terms of delivery and funding support. It is used to attract investment and support from new sources and create a consortium – one of the attractions for potential sponsors. This type of document is often tailored and can go out of date quickly.

#### **Tool: Prospectus**

On the hyperlink above is a template you can follow to help you develop a prospectus if needed.

#### **Opportunities for promoting your group**

Use every opportunity to tell the world you exist, what you do and what you need. For example, include your vision or statement of purpose as a footer in your email and leave 'brochures at schools, local businesses, at events (Landcare and other) – anywhere there is a flow of people.'

Websites are a core communication tool because potential sponsors do web research to find their partners – if you don't have one, consider it and if you do create one make sure it is regularly updated and publicises opportunities for supporting you. The Victorian Landcare Gateway and the Victoria's Volunteers website are both great opportunities to promote your activities and events to possible sponsors. The Victorian Landcare Gateway website is <http://www.landcarevic.net.au/> and the Victoria's Volunteer website is <http://www.volunteer.vic.gov.au/>

Look at promoting yourself in community newsletters and through free radio announcements. Local media representatives should be known to you and appear in your contacts map. Make sure they are on your distribution list for newsletters and other communications, and give them the heads up on events and potential good news stories they might consider covering. Don't forget to celebrate your annual successes in the media – it's a great way of showcasing what you do.

#### **Tool: Guide to writing a media release**

There is a guide to writing a media release that you can follow to help your group with communicating to the media. Click on the hyperlink above to view this guide.

## Section 5

### TAKING ACTION

So far, as a group or network, you've:

- ✓ Developed your statement of purpose
- ✓ Set goals
- ✓ Identified and valued your assets
- ✓ Thought about how to develop your current contacts and how they could help you
- ✓ Chosen your targets and done some research on them
- ✓ Put it all together in a good sponsorship plan
- ✓ Refined existing and developed new communication and promotional materials.

It's time to bring the plan to life. For each goal identified in your plan you've also listed strategies to achieve it, actions, timing, people and measures. It is time to get started, choose your first target and make your first approach.

### MAKING THE RIGHT IMPRESSION

Approaching an organisation for sponsorship can be daunting, especially when you know that the organisation receives a high volume of requests from community groups, but your *Getting Ready* work gives you a chance to stand out.

#### Collect your thoughts

For each of your targets you will have identified contacts that can help, either through an introduction or knowledge about the organisation and you need to have followed up on these contacts before making the approach.



*Follow up on existing contacts that could help with door opening.*

If you don't have a way in through your contacts, you'll need to approach the organisation's contact, such as the community relations or sponsorship manager. Contact details should be a part of your research.

Make sure you review your research on the organisation before approaching them – this is where an electronic profile that everyone can access is useful.

#### Be clear about your role

Your sponsorship plan will have someone in your group nominated to make the approach. It's important to take this role seriously and make a commitment to the whole process as organisations like to know who they're dealing with and feel confident that this person represents your group and is both responsible and responsive.

If possible, it may be worth having just one or two people in your group who make the approaches, and in particular attend the face-to-face meetings – these people need to have participated in the *Getting Ready* process and contributed to building the plan. They should also have a strong understanding of the local environment and community and be able to tell your story.

#### First approach

It's a good practice to make the first contact with any potential sponsor through an initial phone call or email.



*Get in touch by phone or email to ask questions and to let a potential sponsor know you exist.*

The purpose is information seeking, to qualify your research and find out more specifically what interests the sponsor. You should have some questions ready to ask to show you've done your research and know who you're talking to, but need to clarify the finer points. For example:

- ✓ "I see you have supported community projects in X region but you also have operations in Y [the region you are in] – would you consider sponsoring community environmental projects in this area?"
- ✓ "I see that you have a foundation that supports community capacity building projects in the regions that you service – are you able to provide me with more information about eligibility criteria and application timeframes or give the contact details for the person who manages the foundation?"
- ✓ "I gather from the environmental and community investment information on your website and in your sustainability reports that you have supported quite a few projects that help build habitat for endangered species. Will this focus continue into your next funding cycle? If not what is your future focus?"

This is also an opportunity to find out more about the process the organisation has in place for managing requests so you can follow it.

Not only is the information you get from this first approach valuable but by doing this you've also introduced yourself and your group and the potential sponsor will now expect to receive your formal request.

You may have to try calling a few times before you reach the person or hear back from them, or you may be referred a number of times to others in the organisation – be politely persistent and don't be discouraged, it's part of the process.

If your request is straightforward, you may decide to ask upfront in a phone call or email. You'll make these decisions depending on how the conversation is going and the signals you are getting. If things are flowing, don't be afraid to be candid and ask for advice on the best way to gain sponsorship from the organisation and what they are looking for in a community partner – this can save you time and effort.

### **Formal request**

If your first approach was successful, follow it up promptly with a formal request. The shape of this request depends on who you are seeking sponsorship from, how much you know about what they will support and their process.

Use your communication material, including your proposal, to shape a request to your target organisation. If you have any relevant news stories, include these to show that you and your work are well regarded and profiled.

Write a cover letter expressing your interest in working with the potential sponsor to develop a partnership and outlining some of your goals and assets – paint a picture of what an association between you and the target organisation might look like and how they could benefit. Your research about the organisation is the key to tailoring this letter to make it clear it is not a pro forma, but that you've taken the time to select them because you think they would be a worthy sponsor and you could create a mutually beneficial partnership together. At the end of the letter suggest a meeting and perhaps invite them to come and see your work first-hand – this is a powerful way to engage sponsors.

### **Tool: Cover letter**

On the hyperlink above is an example of a cover letter written by Bass Coast Landcare Network. This might be useful for your group to look at so you can develop your own letter template.

A day or so after you've emailed or posted your submission follow up with a phone call or an email to ensure it has been received, and suggest a time for a meeting -- either phone or face-to-face -- in a week to discuss it further.

### **Following up**

The way you follow up depends on the responses you receive from potential sponsors. Be guided by their timelines and conscious that your request is not as a priority but something on the 'to do' list.

Stay in touch and ring them regularly to see if and when they may be ready to progress things – use this as an opportunity to provide some additional information and to start the conversation.

Be careful not to follow up too much or too insistently. The right combination of patience and persistence will serve you well. It may take months to even reach a point where they are ready to meet you.



*Be politely persistent but patient.*

### **'Not at the moment' does not mean 'never'**

When you get a 'thanks, but no thanks', don't be discouraged, it's part of the process. This doesn't mean you will never be considered for sponsorship or support, it just means now is not the right time – perhaps the sponsorship budget has already been committed or the particular project work you are doing does not fit with their priorities.

There are four very important things to do when you get this response:

1. Thank them for their consideration and ask for some feedback as to why they are not interested and how you could increase your chances of gaining their sponsorship in the future
2. Ask that they remember you if a suitable opportunity arises
3. Ask if there are any other ways their organisation could assist you, such as through in-kind offerings and skills support
4. Update your records on the organisation, and make a note to get in touch again in a suitable timeframe (six months to a year).

If you do all of these things, the process is not a waste of time but an opportunity on hold.

### **Meeting your potential sponsor**

If you make it to a meeting stage, things are going well. Be sure you have the right people representing you and they can promote your work and respond to queries. If you are in a meeting and you don't know something, it's fine to say you'll provide that information later, but make sure you do.



*You will stand out from the crowd if you've prepared well – good preparation is not as common as you'd think!*

Here are some tips for the meeting stage and how you might steer the discussion towards a sponsorship commitment:



*Do not put forward everything you have to offer up front when you first approach a sponsor. Rather use additional benefits, such as a high profile signage opportunity, as encouragement.*

- ✓ If there are two of you, decide on your roles and what you want to achieve beforehand. One person may be more active and the other listening, observing and taking notes or you may share the role
- ✓ If you've been asked to make a presentation ensure you're well rehearsed and make it short and sharp – leave time for questions and discussion
- ✓ Listen carefully and note information that is relevant to your request such as budgetary cycles and management processes. Use this information to channel their interest into a verbal and ultimately a written commitment
- ✓ See the meeting as an opportunity to start a working relationship with the representatives of the organisation you meet with – these contacts may be able to provide you with valuable ideas and feedback in managing the process
- ✓ Highlight the value and benefits of their involvement throughout the conversation, focusing on what the organisation will gain by making a commitment to your group or project now - rather than next month or year
- ✓ Be direct but don't attempt the 'hard sell' and provide relevant information but don't overwhelm people with too much detail. Follow cues and leave a positive impression
- ✓ If you get a sense that what you're asking for is too big a commitment for the organisation, scale it down – you should have a Plan B. .
- ✓ Leave with a follow up action or an invitation – for example you might commit to sending some information that they requested, set a time to follow up with a phone call or another meeting or invite them to a group event. If an invitation to an event or to see your work is accepted this can help fast track a commitment if the potential sponsor becomes involved and engaged
- ✓ Follow up on any requests for further information or material immediately after the meeting to show you are keen to progress things.

## Negotiation and working through issues

Negotiation is not about making a sales pitch but is about trying to see the opportunities through the sponsor's eyes and understanding their organisation and its goals. In order to achieve this it is important for you to listen and ask questions.

The focus is on tuning your message to the organisation's needs and aspirations without diverting from your end goal.

The key to setting the tone is positioning your group as a problem solver and value adder for the potential sponsor. Listening helps you:

- ✓ Understand, reflect and clarify the sponsor's position
- ✓ Empathise with that position
- ✓ Enable a response that is positive to your organisation's interests
- ✓ Pose non-threatening questions to address concerns about partnering.

The key to progressing discussions is through reflective listening. This involves taking good notes, highlighting major points of agreement at the end of discussions and seeking clarification when unclear. After a meeting it is worth providing a written draft of your notes to the person you have been talking with for their comment. This helps to check understanding and create consensus. It also means there are fewer points of misunderstanding or disagreement down the track.

During negotiations it is important not to push too hard too soon and not to close down the discussion by focusing solely on your needs. Encourage representatives to describe their organisation's position in terms that suit them – this requires patience.

One way to make the negotiation more comfortable is by meeting outside the office or over coffee – keep discussions informal when starting off.

Issues and sticking points can arise at any stage of the sponsorship development. It's important to know about these and discuss them before they become problems.

Here are a few steps you can take when working through issues with a potential or existing sponsor:

- ✓ Stand back and look at both parties' points of view
- ✓ Jointly look at the cause of any issues or sticking points
- ✓ Clarify what each party wants to do to overcome the problem
- ✓ Express honestly, politely and with good humour what each party is feeling at this point and clarify what is needed to go forward.

### **Be prepared for the unexpected**

There can be a lot of going backwards and forwards in the process of engaging a sponsor and there are no guarantees you'll be successful. There is no foolproof method and at times the process may challenge you. Success comes through good preparation, good communication and persistence.

Opportunities often present themselves unexpectedly and timelines to respond can be short, so it's good to be ready. Being clear on your sponsorship priorities and the associated costs and having communication material such as project briefs ready will help you take advantage of those last minute grant opportunities and be prepared for sponsors who approach you first.

## Section 6

### SAFEGUARDING YOUR SUCCESSES

All the planning work has paid off and you have secured funding for a project. Now it's time to show your sponsor they've made the right decision in choosing to support you.



*Allocating sufficient group resources to managing sponsorships is a good investment because it ensures you can service your sponsor relationships efficiently and this means these relationships will last.*

#### Making an agreement

It's a good idea to document your mutual responsibilities and deliverables in an agreement. Agreements take many forms and often you'll use the agreement format your sponsor provides. If you have access to legal support, it is worth having agreements checked before making the commitment.

Agreements can range from a less formal statement of what each party will provide, which is fine for simple and straightforward arrangements, to more formal signed agreements such as a memorandum of understanding (MOU) or a contract outlining what each party will do and the terms of the exchange. Agreements may outline governance, resourcing, implementation, monitoring and reporting, risk, contingency and evaluation.

#### Tool: Memorandum of understanding

On the hyperlink above there is a template you can follow to help you develop your group's memorandum of understanding along with an example from Bass Coast Landcare Network.

#### Staying in touch

The best way to ensure your relationship stays on track and grows stronger, apart from delivering all agreed benefits to a high standard, is to stay in touch. Good communication is fundamental to developing long-term partnerships built on mutual respect. This can be as simple as an email with a photo of the project outcome to date. It's also important that your group acknowledges that attracting and maintaining sponsors requires certain project management skills and group resources.



*Put all partnership delivery and activity dates in your Activity Schedule to ensure they happen.*

Some suggestions for building a strong partnership:

- ✓ Assign responsibilities for partnership liaison and document them
- ✓ Connect to as many areas of the organisation as possible
- ✓ Ensure you have good information about your sponsor and include articles and news about them and about the partnership in relevant communications
- ✓ Invite sponsor contacts to all of your events and activities, not just the ones that directly involves them
- ✓ Conduct regular health checks of your sponsor relationships, either informally with a phone call or formally with a short survey – listen to their feedback and address issues and concerns where possible
- ✓ Identify and deal with any issues early – if project delivery is held up due to weather conditions for example, let them know immediately

- ✓ Schedule regular catch-ups by phone (monthly or fortnightly) and face-to-face meetings quarterly to monitor progress and discuss any issues
- ✓ Ensure you meet their reporting needs – reporting requirements should be discussed and agreed to up front. Sponsors usually want brief, regular updates with great photos - of people and animals in the environment - and stories to tell. They don't want long reports with reams of technical information
- ✓ Celebrate successes and communicate them as far and wide as you can. Celebration points need to be connected to various milestones and they may take the form of launches, announcements, signage and community and/or sponsor staff events. Resources need to be allocated to these activities at the planning stage.

#### **Tool: Communications plan**

Some of these topics may be documented in your agreement, or included in a separate communications plan. On the hyperlink above there is a template you can follow to help you develop your group's communications plan.

## **Section 7**

## **ADDITIONAL INFORMATION AND REFERENCES**

### **MAV Grassroots Grants**

The MAV [Grassroots Grants](#) Resource Kit offers great tips and useful templates for getting 'grant ready'. It provides advice on where to start looking for available funding and the best approach.

### **Victorian Landcare Gateway**

A web page development tool is available on the Landcare Gateway [www.landcarevic.net.au](http://www.landcarevic.net.au)

### **Has your group got adequate insurance?**

On the [Landcare Gateway Farm Trees & Landcare Association](#) under partnerships the Farm Trees and Landcare Association (FTLA) have information about insurance options they supply to environmental volunteer groups. Talk to their coordinator for further information. [www.landcarevic.net.au](http://www.landcarevic.net.au)

### **Landcare online**

Use Landcare online ([www.landcareonline.com.au](http://www.landcareonline.com.au)) to see which organisations are already engaged with the Landcare movement. It is important when approaching a corporate that Landcare is not seen as an unorganised program, this is why you should check that no one else within Landcare is working or talking with the corporate you are about to approach. If unsure you alternatively can ring 03) 9662 9977 for further assistance. Equally important is the use of the Landcare logo. Use the [LAL Brand Style Guide](#) which provides important information on logo usage, this is available on the Landcare Australia website and has a link above.

### **Acknowledgements**

Landcare Victoria gratefully acknowledges the Municipal Association of Victoria for their permission to use and adapt material from the Grassroots Grants Resource Kit for community groups seeking funding. The following Grassroots Grants material were utilised in this guide:

- ✓ S.W.O.T. analysis template
- ✓ Relationship mapping template
- ✓ Funding sources guide
- ✓ Planning template.