



Corporate and Foundation Relations

Charitable Sponsorship Toolkit

Introduction

One of the many ways a company can engage with JMU is through the charitable sponsorship of university projects, programs, and events. This toolkit, along with the CFR Charitable Sponsorship Agreement were developed in collaboration with the JMU Foundation and in line with Sponsorship Policy 30200.

If you have questions or need help during any stage of the charitable sponsorship process, please contact Carrie Combs, Senior Director of Corporate and Foundation Relations, at teiecha@jmu.edu or (540) 568-4122.

Sponsorship or Advertising?

When developing your sponsorship package, it is vital to understand the distinction between a charitable sponsorship and advertising.

- A **sponsorship** is charitable when a company pays for part of or all a program or event's costs and receives recognition (e.g., logo placement, signage, verbal recognition, a featured speaker, etc.) for its support.
 - The IRS defines a sponsorship as any payment made by a person engaged in a trade or business for which the person **will receive no substantial benefit** other than the use or acknowledgement of the business name, logo, or product lines in connection with the organization's activities. 'Use or acknowledgement' does not include advertising the sponsor's products or services. The organization's activities include all its activities, whether or not related to its exempt purposes.
- **Advertising** the sponsor's products or services include: 1) messages containing qualitative or comparative language, price information, or other indications of saving or value; 2) endorsements; and 3) inducements to purchase, sell, or use the products or services. The use of promotional logos or slogans that are established as part of the sponsor's identity is not, by itself, advertising. In addition, mere distribution or display of a sponsor's product by the organization to the public at a sponsored event, whether free or for remuneration, is considered use or acknowledgement of the product rather than advertising.

Developing a Sponsorship Package

- Look at your project, program, or event budget and determine the appropriate levels of support and number of sponsors needed at each level (e.g., will the top supporter be exclusive, or can there be co-sponsors?)
- Determine what you can offer as benefits **that offer no tangible value** such as company logos on signage, website, social media, etc.; item giveaways; recognition in publications related to the event; verbal recognition at events;

featuring a keynote speaker from company; naming opportunities; event access for employees; and student recruitment opportunities.

- Design a sponsorship package document, including:
 - A detailed description of your event
 - All sponsorship levels and benefits for each level
 - Information on the return on investment (ROI) your event provides to companies including marketing opportunities, access, impact and reach (prospective audience; anticipated number of people)
 - Contact information and details about how to learn more or partner
- Add the sponsorship information and document on your project, program, or event's website, as relevant
- Send to Carrie Combs at teicheca@jmu.edu for internal approval before sending your sponsorship package to any external partners.

Finding Prospective Sponsors

- Research similar projects, programs, or events internal to JMU and at external organizations and identify the types of companies that sponsor them.
- Think locally and consider small businesses and local companies in our community for support; although some may not be able to donate cash, they may be a great source for in-kind gifts.
- Focus on businesses that might want to reach your same audience or that have demonstrated an interest in your cause or community. For example, several home improvement or building supply companies sponsor Habitat for Humanity.
- Relationships are key. Use connections you already have to companies for better luck with finding a sponsor; cold calling is usually less successful but can work with persistence. Leverage your existing personal and professional connections.
- Connect with the CFR team and we will use our internal resources for corporate prospecting to identify potential matches.

Aligning with Sponsor Interests

By answering the following questions, you'll be able to pitch why a company should want to sponsor your project, program, or event:

- If the company has sponsorship requirements, read through and understand them thoroughly
- Analyze the types of activities the company typically sponsors
- Determine whether your initiative aligns with the company's mission
- Does your event promote the brand or image of the company?
- Does your work align with the company's organizational values?
- Has the company given to similar organizations?
- Does the company have a connection to JMU? To your project, program, event or academic area, etc.?

Requesting Approval and Clearance

Once you have developed your sponsorship package and prospect list, send it to Carrie Combs at teicheca@jmu.edu for clearance. CFR will cross-check your list to identify any conflicts with outstanding university asks or opportunities to leverage existing

relationships with specific companies. This allows us to maintain holistic partnerships, ensuring a coordinated approach that benefits both your work and the university's broader goals.

Reaching out to Prospective Sponsors

Once your list is cleared, you are ready to begin reaching out to prospective sponsors. Keep emails short, request a meeting (if contacts are local) or a call, and attach your sponsorship package document. Allow up to a couple of weeks for an initial response and follow up with a call if the recipient doesn't respond initially. You may have to follow up multiple times. CFR is willing to join calls or attend meetings to facilitate an ask to a company.

Finalizing a Charitable Sponsorship

If a company makes a commitment to sponsor your project, program, or event, please reach out to Carrie Combs at teicheca@jmu.edu. The CFR team will draft a Charitable Sponsorship Agreement between the university and the company.

This agreement will include the purpose of the sponsorship and details about the sponsorship contribution, university and sponsor obligations, sponsor rights, sponsorship term, confidentiality, and any other relevant information.

The agreement is signed by the Senior Director of CFR, the primary contact for the program/project/event, and the sponsorship company's primary contact.

Engaging Sponsors; Cultivating Investment

Be sure to deliver on all the benefits you guaranteed your sponsors for this event, project, or program.

As a form of good stewardship, invite the company to attend the event or program, or attend future events, programs, or be involved with future projects.