



COMMERCIAL SPONSORSHIP DESK REFERENCE

PRESENTED BY:

**US COAST GUARD
MORALE, WELL-BEING, and RECREATION (MWR)**

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Acknowledgment:

The US Army Community and Family Support Center (CFSC) completed writing this guide in June 1996. In 2003, the Coast Guard Office of Exchange and MWR obtained permission from the CFSC to edit the contents of the Army Sponsorship Desk Reference for use in the Coast Guard MWR program. Edits were limited to replacing Army policy references with Coast Guard references, and minor content edits to adapt the material to our Coast Guard MWR audience. We would like to thank the Army CFSC for permission to modify this material with the intent to strengthen the Coast Guard MWR Commercial Sponsorship Program.

This Commercial Sponsorship Desk Reference is provided with the intent that it will provide users with a better understanding of how to operate commercial sponsorship successfully. The information in this Guide is not Coast Guard policy on the commercial sponsorship program. This policy may be found in the Coast Guard Morale, Well-Being, and Recreation Manual, COMDTINST M1710.13 (series).

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Chapter 1 - Sponsorship History

What is Commercial Sponsorship?

Commercial sponsorship is the act of providing assistance, funding, goods, or services to a MWR event by an individual, agency, company, corporation, or other entity for a specific (limited) time in return for public recognition or advertising promotions.

The strategy of commercial sponsorship is to meet the specific measurable goals of a company or brand by building a link in the target audiences' minds between the sponsor and a valued organization or event.

What is Coast Guard Commercial Sponsorship?

Coast Guard commercial sponsorship is the act of providing assistance, funding, goods, equipment, or services to MWR programs and events by an individual, agency, company, corporation or other entity (sponsor) for a specific (limited) time in return for advertising or promotional opportunities within the Coast Guard community.

Sponsorships are not gifts or donations.

Coast Guard commercial sponsorships require written agreements and are for a limited period of time. The program does not include the donation of volunteer services, premiums, coupons, or limited samples that are considered gifts.

Commercial sponsorship may be used only for MWR events and programs. Unit events, family support groups, private associations, and non-MWR programs are not eligible for the support. All solicitations must be made by MWR sponsorship personnel.

There are two types of MWR commercial sponsorships:

- *Solicited sponsorship* - Gained through a formal process targeting an adequate number of known U.S. sources in a competitive manner. Alcohol (including beer) sponsors may not be solicited and tobacco sponsors shall not be solicited or accepted.
- *Unsolicited sponsorship* - Comes from companies that approach MWR with an idea and resources. Unsolicited sponsorship from alcohol companies may be accepted.

The Coast Guard Market

At the time this Desk Reference was prepared (2004), active duty Coast Guard personnel number approximately 35,000. Add their family members, Auxiliary, reserve, retirees, and civilian employees and the total surpasses 270,000. The Coast Guard market is a viable one. In the active duty Coast Guard there is no unemployment. Coast Guard men and women receive 30 days of paid vacation per year. We are a mobile society, having to make new "living conditions" every 2-3 years. A high percentage of the Coast Guard is under the age of 30 - the age when many buying patterns and brand loyalties are established. These factors contribute to the appeal of the Coast Guard market.

What Do Potential Sponsors Want?

Sponsors are looking for the most effective way to meet their specific business goals. Some things sponsors might be looking for include:

- Generation of awareness through brand or product exclusivity at the sponsored event

or program.

- An opportunity to impact specific results in the narrow market segment of the military and identify their product/service with the Coast Guard's activities and lifestyles.
- Advertisements in installation publications, on cable TV or radio stations, and in event programs.
- Positive publicity about their organization in any way possible.
- Merchandising and promotions in exchanges.
- Exposure to top leadership and decision makers via receptions, activities, or special opportunities.
- Visibility at the event using the sponsor logo on signs, banners, tickets, flyers, displays, sportswear, etc.
- Opportunities at the event to sample and have their products sold, to demonstrate brand attributes or to survey consumers about such issues.
- Scripted event announcements, VIP hospitality packages, and opportunities to participate in the event or meet the celebrities.
- One-of-a-kind mementos for sponsors and their VIP guests.
- Right of first refusal of sponsorship participation.

History of Commercial Sponsorship in the Civilian Community

Sponsorship has been tracked back to the early 1900s and took off with the introduction of the television in the 50s. As David Wilkinson, author of **Sponsorship Marketing** wrote, "The first extensive use of sponsorship marketing began in the 1960s and 1970s when corporations began the search to receive a return on their donations to sport and other social service organizations" (Pg. 9).

Currently, sponsorship continues to be the fastest-growing form of targeted advertising. This fact can be seen in the statistics provided by International Events Group (IEG) of Chicago, Illinois, a group who tracks and reports sponsorships and trends. Their 1995 data shows that in 1994, North American companies spent \$4.2 billion, a 15 percent increase over 1993. Spending in 1995 was projected to grow 11 percent, the slight slowdown partly attributed to the 1994 Major League Baseball and National Hockey League labor disputes.

In 1996, North American corporate sponsorship spending was projected to break the \$5 billion barrier, thanks to the Atlanta Olympic Games, with 1997 projections at \$5.9 billion.

Case Study #1: Sponsorship History

1984 Olympic Games

Prior to the 1984 Summer Olympic Games held in Los Angeles, California, commercial sponsorship generated only a small percentage of the total operating expenses of the Games. The 1980 Winter Olympic Games held in Lake Placid, N.Y. had more than 300 commercial sponsors but generated less than \$10 million in cash.

The Los Angeles Olympic Organizing Committee (LAOOC), under the direction of Peter Ueberroth, set their sponsorship goal at \$200 million. They came up with the idea to limit sponsorships

to a total of 30, in order to prevent clutter and duplication. They also decided to select only one sponsor per category, thus increasing the value of the sponsorship. They set a \$4 million limit for each potential sponsor. By establishing this minimum, it forced the “non-players” out of the game. Their first sponsor was Coca-Cola with a fee of \$12.6 million. The next sponsor to sign on was Anheuser-Busch for \$10 million. By the time the next sponsor signed on, the LAOOC had created a “shopping list” of their needs and tried to match them with potential sponsors and suppliers. Sometimes they had to stretch their imagination to find a fit. A great example was Southland Corporation’s (owners of 7-Eleven) cycling sponsorship. Ueberroth pitched the sponsorship idea to the head of Southland based on the fact that 7-Eleven had a “bike-in” clientele. In other words, Ueberroth always saw racks of bikes parked in front of the 7-Eleven.

It was a hard sell, but once the deal was made, Southland became so involved in the program that they not only sponsored the Olympic velodrome, but also built a velodrome at the U.S. Olympic Training Center in Colorado Springs, Colorado. Not all the potential sponsors had positive experiences in 1984. Kodak, who had long been an Olympic sponsor and dominated the film category, believed the LAOOC had little choice but to choose them as the film category sponsor. They offered only \$2 million. When Kodak missed the deadline to meet the minimum of \$4 million, the LAOOC went with Fuji. The Fuji deal was worth \$7 million in cash plus the film processing of all news photographers’ film at the Games. Because of Fuji’s aggressive sponsorship, it made strong inroads into the U.S. market.

All in all, the 1984 Summer Olympic Games in Los Angeles signed on 30 sponsors and met all their sponsorship goals.

History of Commercial Sponsorship in Military Communities

Commercial sponsorship in the military began in February 1988, with an exception to Department of Defense (DoD) Instruction 1015.2. This exception allowed for the competitive solicitation of corporations for support of specific MWR events. The exception was for a one-year test period, during which time DoD monitored the program. Those Services wishing to participate in the program had to provide DoD with written guidance and implementation procedures. The Army distributed commercial sponsorship guidance and implementation procedures in January 1989. This guidance provided for a one-year test of the commercial sponsorship program on Army installations. During the first year, the Army generated \$600,000 in cash, goods, and services.

In May 1992, DoD issued a policy memorandum on MWR commercial sponsorship. This policy replaced the exception that the Army was currently operating under, and solidified commercial sponsorship as an MWR program. The new policy expanded in scope to allow sponsorship of MWR programs of limited duration as well as MWR events. The May 1992 policy added the need for the sponsor to certify in writing that the costs of the sponsorship will not be charged to any part of the Federal government. The

May 1992 policy also clarified the role of contracting officials in sponsorship and gave greater latitude in accepting unsolicited sponsorship. In October 1992, DoD issued a modification to the May 1992 policy. This modification called for the coordination with AAFES to ensure that sponsorship agreements do not violate existing AAFES agreements. The Army issued interim guidance in June 1994. This guidance incorporated the latest DoD policy. On 29 September 1995, the Army published AR-215-1 Nonappropriated Fund Instrumentalities and Morale, Welfare, and Recreation Activities. Included for the first time was policy governing the Army Commercial Sponsorship Program.

On 6 September 2000, the Coast Guard published COMDTINST M1710.13A, the Coast Guard Morale, Well-Being, and Recreation Manual. The Coast Guard's policy governing commercial sponsorship is included in this Manual. One of the first major commercial sponsorship agreements allowed the Coast Guard MWR program the opportunity to provide a central recreational library program where one had not existed in the past. Recreational reading was provided to 82 of the Coast Guards most arduous duty stations during 2004 for the enjoyment of these crews, including those currently stationed in support of Operation Iraqi Freedom and Operation Enduring Freedom.

The Benefits of Sponsorship to the Coast Guard

Coast Guard sponsorship offsets the cost of, or enhances existing MWR events and programs and provides a means for MWR to offer exciting new programs. It allows MWR to provide programs at a reasonable cost to Coast Guard patrons. Sponsorship provides revenue-generating events and programs that support non-revenue-generating programs. Commercial sponsorship increases the perception of professionalism of Coast Guard MWR programs by providing high quality program enhancements, such as color advertising pieces and promotional materials. Sponsorship also helps to foster good relationships between the Coast Guard and the business community.

Coast Guard Commercial Sponsorship Mission

The mission of the Coast Guard Commercial Sponsorship Program is to support vital military MWR programs by obtaining private sector funding, services, or supplies in exchange for advertising and promotional opportunities within the Coast Guard community.

Works Cited

International Events Group, **Sponsorship Value: Getting, Measuring and Increasing Yours**, Chicago, IL, 1995. Page 3.

Wilkinson, David. **Sponsorship Marketing**, The Wilkinson Group, Sunnyvale, CA, 1993. Page 9.

Chapter 2 - Sponsorship Guidelines

Policy

Coast Guard commercial sponsorship is governed by the Coast Guard MWR Manual, COMDTINST M1710.13 (series), Chapter 5. H, see Appendix A.

Authorized Sponsorship Programs

Commercial sponsorship is reserved for MWR events and programs only. Commercial sponsorship is not a gift: gifts are governed by the Financial Resource Management Manual, COMDTINST M7100.3 (series) and Acceptance and Accounting for Special Projects and Other Gifts to the Coast Guard From Non-Federal Sources, COMDTINST 5760.14.

The commercial sponsorship representative cannot solicit sponsorship for private organizations, although private organizations may obtain sponsorship through their own efforts. The unit commanding officer or officer in charge has the authority to limit or restrict solicitation by private organizations if this solicitation competes with or duplicates the functions of the authorized MWR commercial sponsorship efforts. Rules governing private associations are covered in Enclosure 2 of the MWR Manual. Close working relationships should be developed between the commercial sponsorship representative and authorized private associations operating on the installation. Private associations should be informed of the solicitation efforts of the authorized sponsorship representative to alleviate the potential for competition for the same support from industry and local businesses. Private associations may be a sponsor of MWR events and programs.

Exchange of Values

Commercial sponsorship is the exchange of values. Sponsors provide cash/goods/services in return for advertising and promotional opportunities within the Coast Guard community. Coast Guard MWR may provide benefits such as signage, MWR promotion, and more, in return for funding, goods, services, and/or in some instances equipment.

Solicited Sponsorship

Solicited sponsorship must be competitively bid and meet all conditions in COMDTINST M1710.13 (series). Solicitations must be announced. This may be in the form of written proposals sent to at least 3, or as defined in policy, corporations or companies, advertisements in newspapers, magazines, and trade journals. There is a sample letter announcing commercial sponsorship opportunities in Enclosure (13) of the MWR Manual. More than one sponsor may be sought for a specific MWR event. Evaluation criteria will be used to determine the acceptance of solicited sponsorship. The criteria should include the value of goods, services, or funding offered, the specific limited time for public recognition and/or advertising promotion, and the appropriateness of the potential sponsoring agency. Sponsors should not receive favored treatment of special

concessions with the exception of recognition of sponsor support, advertising, and/or promotional opportunities.

Unsolicited Sponsorship

Unsolicited sponsorship follows the same guidelines as solicited sponsorship except that it doesn't have to be competitively bid or announced. Written proof of the unsolicited offer is ideal, or at a minimum, you should document the initial offer including the date, point of contact (POC) and amount/details.

The following principles apply to unsolicited sponsorships:

- Sponsorship is entirely initiated by the prospective sponsor.
- Receipt of an unsolicited proposal does not require solicitation of other sources.
- Following receipt of an unsolicited offer, MWR needs should be determined and an evaluation of the offer made.
- Unsolicited alcohol sponsorship may be accepted if similar opportunities exist in the civilian community and the sponsored event is not directed predominantly or exclusively at the military market. Product sampling is not authorized.
- Offer may be either accepted or declined.

Written Agreements

All commercial sponsorship agreements must be in writing. There is a sample sponsorship agreement in Enclosure (14) of the MWR Manual. Sponsorship agreements must include the following:

- Event or program description.
- Detailed summary of MWR obligations.
- Detailed summary of entitlements of the sponsoring company or organization.
- Term and termination clause.
- Certification that no costs incurred by the company are charged to any part of the Federal government.
- Force Majeure clause.
- Independent contractor clause.
- Assignment clause.
- Disclaimers.
- Signature of a Coast Guard representative, usually the MWR Director/Officer (or equivalent).
- Signature of the sponsor representative.
- Legal review. Ensure each agreement is staffed through your servicing legal office.

Standing Contracts to be Honored

Consideration must be given to contracts and agreements that are currently in place. MWR management should ensure that such agreements do not violate existing Coast Guard Exchange System (CGES) policy, contracts, or understandings. MWR personnel should work closely with local CGES management. Consideration of standing MWR contracts and agreements must also be honored. Areas of particular concern are telecommunications agreements and travel agency contracts.

Authorized Solicitors

Normally the MWR Director/Officer, or designated representative, should be the individual(s) who performs commercial sponsorship duties.

Commercial Sponsorship “Representative” Role

The commercial sponsorship representative is the point of contact for all commercial sponsorship conducted by the installation’s MWR program. The sponsorship representative is responsible for coordinating the direct solicitation for all MWR events and programs and for receiving unsolicited proposals for sponsorship. The sponsorship representative must work closely with activity managers to develop their sponsorship proposals, to help activity managers understand sponsorship, and to build equity in their events. The sponsorship representative is also responsible for composing the written agreements outlining the MWR and the sponsoring corporation’s responsibilities, and for assuring they have legal review and concurrence. The commercial sponsorship representative is also responsible for proper file documentation.

MWR Director/Officer’s Role

The MWR Director/Officer is responsible for informing the commercial sponsorship representative of support needed for their events and programs. The program manager should provide event information including dates, location, expected attendance, and sponsor benefits. A sponsorship agreement should be sought ideally nine to twelve months prior to the event.

Contracting Role

To avoid the appearance of conflict of interest, NAF contracting officials will not be directly or indirectly involved in the solicitation of commercial sponsors. NAF contracting officials have no approval authority for commercial sponsorship agreements. Contracting officials may act in an advisory capacity in developing the commercial sponsorship solicitation package, evaluation criteria, and on deciding whether vendors are barred from doing business with the government. Contracting officials may also advise on companies currently doing business with Coast Guard MWR. Only contracting officials may obligate funds generated by commercial sponsorship in accordance with NAF contracting policies.

Servicing Legal Office Role

All sponsorship agreements require legal review and concurrence. The Office of General Law, COMDT (G-LGL), has assisted COMDT (G-WPX) in developing an agreement template. This sample template is located in Enclosure (14) of the MWR Manual. The servicing legal office or ethics advisor should also act in an advisory capacity in the areas of ethics and standard of conduct. The commercial sponsorship agreement should be reviewed and approved by the commanding officer and legal office prior to actions of either party.

Use of NAF in Support of Commercial Sponsorship

Nonappropriated funds may be used, with the commander's approval, to support commercial sponsorship with sponsor recognition, mementos, and awards.

Sponsor Recognition, Mementos, and Awards

Recognition of a sponsor's contribution to the quality of life for Coast Guard members is important in pursuing the sponsor's continued support. Nonappropriated funds may be used for sponsor recognition events such as award luncheons, golf or recreation events, or mementos and awards. The decision to use NAF for a sponsor "thank you" is at the discretion of the commanding officer and is based upon the concept of being a sound business expense. Care should be taken to prevent the perception of favored treatment. It is best if all of the installation's sponsors are recognized at an annual event or if an awards ceremony is built into the sponsored event.

Gifts and Donations to the NAFI

Gifts and donations may be accepted by MWR when voluntarily offered by a private individual, group, or corporation and it is determined that the acceptance is in the best interest of the Coast Guard. Gifts and donations may not be solicited; however, MWR needs may be identified when responding to inquires from potential donors. Special concessions, advertising rights, and sponsor benefits cannot be given to donors. Rules governing the acceptance of a gift or donation by MWR may be found in the MWR Manual, Chapter 6. K, Financial Resource Management Manual, COMDTINST M7100.3 (series), and Acceptance and Accounting for Special Projects and Other Gifts to the Coast Guard From Non-Federal Sources, COMDTINST 5760.14.

Ethical Considerations

Because of the duties and responsibilities of the commercial sponsorship representative, care should be taken to follow the rules and regulations governing ethics. The commercial sponsorship representative is continually dealing with private industry, therefore, the perception of conflict of interest and unethical behavior must be avoided at all times. If there are any questions regarding the acceptance of a gratuity or gift, check with your installation's servicing legal office and/or your ethics advisor.

Chapter 3 - Event Planning

Formalizing a Systematic Approach

Where do you begin to approach the actual implementation of a sponsorship strategy?

To begin, you must understand two important points:

- Sponsorship works best as part of a committed and systematic plan.
- You are working on the sponsor's timelines, not your own.

The Commitment to a Systematic Plan

Acquiring sponsorship funding is a long-term and on-going project. Although there are many helpful tips and systems to use, sponsorship is more of an "art" than a "science." Many sponsorship deals are dependent on the relationships you establish with the sponsor's decision-makers. Although your materials may be wonderful and your event fantastic, hundreds of worthy organizations are continuing to jump into the sponsor dollar competition and the trick is to get a chance to be considered. It is helpful to make a long-term commitment to beginning and continuing a systematic sponsorship development program and to get key leadership and management support at every level. This Guide is full of tips for communication and committee structures to garner such support; but the reality is, each installation will have its own set of opportunities and challenges. Developing open lines of communication and the spirit of cooperation is the first place to start.

Living on the Sponsor's Planning Timelines

The next basic piece to the puzzle is to understand that you are working on the sponsor's timelines, not your own. The timeline of the sponsor depends on the point-of-entry for your request (local, regional, national) and the scope of the project (how many associated promotions or activities are included). The timelines are also different by industry and by the budgeting timeframe of the sponsor.

Generally, sponsors budget annually for programs and events. Larger and more sophisticated sponsors might work one or two years ahead to block in their major expenditures and the probable events they will support. This is especially true when sponsors repeat support for your events and you work on a sponsorship relationship where you know at the end of one year what is likely for the next. The moral of this story is that you need to get busy organizing and promoting your sponsorship opportunities early so you do not miss out simply by missing the budget process!

Exceptions to the General Rules

Of course, there are exceptions to every general rule, and here are a few with commercial sponsorship:

- If a sponsor really wants to become a part of your event or target your community they can usually find the money or in-kind products. Sponsorship funding can come from many budgets, such as advertising, community relations, and promotions. The key here is using the internal sponsor relationship that "makes it happen" outside of the rules.
- Sometimes budgeted money isn't spent and you "luck" into budgeted money that

sponsors want to spend. Again, the key is working with the person inside the company who knows the budget status and goes to bat for you.

- Some companies have very extensive formulas of dollars spent to value received. If you do not fit into the formula, you are not considered.
- Other companies have internal committees which meet on specific timetables and have policy about how to be considered.

So, the second moral is....get to know your individual sponsor contacts and begin to build records of the specifics of their organization and their policies. This information may take awhile to learn and understand. That is why sponsorship is a long-term commitment to a systematized process.

Creating Your Sponsorship Opportunities Menu

Once you are committed to continuing the process of developing and refining your sponsorship plan, it is time to develop the systems that work for your installation so that every year you follow the same path.

The basic components that are covered include:

- Beginning with Your Major Events.
- Outreach to Key Installation Contacts: Creation of Procedure.
- Other Installations' Successful Events, Ideas, and Contacts.
- Creating Something New: Where to Find Ideas.
- Coast Guard Special Dates.

Beginning with Your Major Events

The first place to start is with your major events. The major established events are probably most valuable to sponsors because:

- You have a track record of success to show them.
- You are likely to have specific details about the audience, attendance, consumption of foods and beverages, and styles of marketing/coverage.
- These are the places to reach the biggest numbers at one time.
- These size events are more likely to have media coverage or involvement, which is usually very valuable to sponsors.

To help in this process, we have created a generic Sponsorship Opportunity Audit for you to use to think through the event details and the role of sponsors. For a sample *Sponsorship Opportunity Audit*, see Appendix B. Remember, as you think about what you want sponsored, you must always ask the hard question, "What *measurable* results can I *guarantee* to my sponsor?" There are two critical words here:

- *Measurable*: which implies tangible and does not count the intangible goodwill positioning, VIP status, and other things we will discuss later.
- *Guarantee*: which means you are positive you can produce the results.

All friendship and goodwill aside, sponsors are buying results. Their goal is to pay the lowest price for the biggest results that fit their specific set of needs, on their timetable. And you are in competition with others who think they can deliver those results better than you!

Outreach to Key Installation Contacts

While looking at your largest events, it is critical to reach out to anyone on the installation who may have sponsorship ideas or requests. This process may be very personal or informal, based on how your installation is organized. The outreach procedure should be put in writing. You may communicate the expectation of roles with a Memorandum of Agreement (MOA). This document will help keep clear the role definition in the sponsorship solicitation and execution process. The MOA will also establish the importance that you are the only contact who is soliciting sponsors. For a sample *MOA*, see Appendix C.

Other Installations' Successful Events, Ideas, and Contacts

Another place to look for input into the menu of opportunities for your own sponsorship menu is to look at the success of other similar-size installations. Pick up the phone and talk to your fellow MWR professionals to see what is working for them and how they fund their activities. Try to get copies of everything from promotional plans to after-action reports and sponsorship proposals. Can they go through their local contacts to help you find a sponsor contact in your area? Do they have positive sponsor feedback or testimonials that can be used in your sales materials? What mistakes have they learned from? Do they have other advice?

Of course, offer to share information in return, and make a special effort to thank the person for their support. The Coast Guard is a small community competing with others for sponsorship dollars. Remember, our mission is to support the Coast Guard Family. Promoting and contributing to quality events meet that goal and help to give MWR a positive image to our patrons. Working together works!

Creating Something New: Where to Find Ideas

Finally, you may want to create brand-new ideas for sponsor involvement.

There are many places to look for new ideas, including:

- **CFSC Feedback.**

This publication is the Army MWR newsletter. It is filled with articles on the latest happenings in Army MWR. Feedback is available at www.armymwr.com.

- **International Event Group (IEG).**

This organization serves as a resource for event managers and sponsorship directors by providing seminars, conferences, and reading materials such as:

- The Event Marketing Seminar Series
- IEG Directory of Sponsorship Marketing
- IEG Sponsorship Report

- **Military Club & Hospitality Magazine.**

This magazine, published eight times a year, features important MWR market data, location profiles, names in the news, and new product information.

- **Government Recreation & Fitness Magazine.**

This magazine, published ten times a year, highlights the latest developments and initiatives in military recreation and fitness.

- **Government Food Service.**

This magazine, published nine times a year, focuses the food service industry within the government to include the military.

- **Executive Briefing.**

This is the monthly trade journal of the American Logistics Association.

- **Parks and Recreation.**

This magazine is published monthly by the National Recreation and Parks Association.

- **MWR Today.**

This magazine, covering aspects of military MWR, is published monthly by the International Military Community Executives Association. MWR Today has valuable insights through regular articles of MWR programs and is a good source for MWR products and services.

Coast Guard Special Dates

A few special dates are celebrated in the Coast Guard including:

- The Month of the Military Child - April
- Memorial Day - Last Monday in May
- Armed Forces Day - May 18
- Independence Day - July 4
- Coast Guard Birthday – August 4
- Veterans Day - November 11

Your Individualized Sponsorship Program

Now that you have done the homework and gathered all the possibilities, it is time to develop your menu of opportunities. This process includes:

- Setting Your Measurable Goals and Objectives
- Prioritization of Activities and Opportunities
- Creation of an Announcement of Sponsorship Opportunities
- Keeping Other Opportunities on the Shelf

Setting Your Measurable Goals and Objectives

In order to establish your individualized sponsorship program, begin by setting definite goals, not only for a value of cash and in-kind services, but for the program as a whole. Since sponsorship is always changing, these goals will grow and change with you.

Think of the goals as your business plan and the company as the sponsorship area.

All installations will set their own goals and the specific measurements to reach the goals. Some possible areas to consider include:

- **Goal:** To expose your installation to “x” number of potential sponsors.

Measurement: Number of potential sponsors you contacted.

- **Goal:** To develop relationships with “x” number of sponsors in “x” categories.

Measurement: Number of sponsors whom you have gone beyond casual contact to business relationship.

- **Goal:** To create an extensive sponsor database recording contacts, policies, timetables for decision, past Coast Guard sponsoring history, and all on-going contacts.

Measurement: The setup of the database and the extensive record keeping for on-going use.

- **Goal:** To raise “x” in cash and in-kind sponsor support for the installation.

Measurement: Amount raised in cash and in-kind. The reason you need such a variety of goals is because the relationship building and staff development that is so critical to financial success takes time and intentional energy. It is impossible to luck into every deal with every stranger, and again, sponsorship dollars are so valuable that there is strict competition for every one of them. Meeting non-cash goals is an important part to a successful and growing program.

Prioritization of Activities and Opportunities

When creating your sponsorship strategic plan, you must prioritize the events and programs you try to have sponsored. It is potentially a sensitive decision to determine which events and programs will be highlighted in an announcement of sponsorship opportunities or with individual sponsorship proposals. Many factors will play into where the sponsorship time and resources will be allocated. This is not a sponsorship manager’s only decision. The desires of the Command, as well as the needs of the installation MWR program as a whole must be considered. There may be no right or wrong way of deciding. On some installations, the CO/XO may determine the priorities for sponsorship, on others a panel may be convened to determine the ranking for events and programs seeking sponsorship support.

Meeting non-cash goals are an important part of a successful sponsorship program.

Creation of an Announcement of Sponsorship Opportunities

Once you have chosen your opportunities, it will be time to develop the communication tools that you will need to communicate your properties to potential sponsors. Chapter 7 addresses the actual writing of the sponsorship-specific proposals. At this point, your focus is on creating the basic information about the installation and your commitment to partnering with sponsors to meet their needs.

Creating the Announcement

Your annual overall opportunity announcement is the showcase of all your installation has to offer. In creating this “overview,” you can list the variety of smaller projects and activities next to your annual favorites. The purpose of the announcement is to give the overall story of your upcoming year of opportunities and to “whet the appetite” of sponsors for the specific activities.

Remember, this announcement will be read by people who are outsiders to the Coast Guard and your programs, so always include the following information:

- Name of installation.
- Location: City and state.
- Installation demographics.
- Overview of the focus of the installation, key details about the history of the installation and its successes.
- General photos, maps, logos or anything else that represents the installation.
- Possible overall schedule of the year (this information dates the piece and makes it

tough if you make changes).

- Highlights or pictures of your annual event(s).
- Name (or at least staff position), address, phone, fax, e-mail of the sponsorship point-of-contact (POC).
- Possible name of commander or top leadership.
- Possible comments from or about other past satisfied sponsors.

Using the Announcement

Your annual sponsorship solicitation announcement is an important tool in recruiting new sponsors. You can use this piece to:

- Give each contributing activity area extra copies to use as they promote their programs.
- Give copies to the command and key staff to showcase your sponsorship efforts and to educate them on what you are “selling.”
- Add a letter of introduction and mail to all potential sponsor contacts with an offer to bring specific packages.
- Take your solicitation announcement to special event and marketing conferences as you network to showcase your opportunities.
- Include the announcement with every specific sponsorship proposal.

You might have long-standing relationships with sponsors of particular events, and you may (with their permission) choose to include sponsor logos on your overall piece. The good side of using sponsor logos is that it shows you have active sponsors, and it positions you as a successful project. The bad side is that a competitive sponsor may be turned off if they think their competition has dominance of your programs.

Keeping Other Opportunities on the Shelf

Just because every opportunity cannot fit into a sponsorship solicitation package does not mean it is not an event worthy of sponsorship. Sometimes when you develop relationships and get to really understand sponsors' needs, you uncover possible opportunities between the company and some of your smaller programs/events. Keep the detailed worksheets of all requests ready for the sponsor match you may find. You could even create a list of “other programs/events available for sponsorship” and add that to your announcement or sponsorship opportunity newsletter. Don't ever give up - just prioritize the biggest hits first to attract the sponsors and begin the relationships. Then offer the smaller things later when you “pull them off the shelf.”

General Tips on Event Creation, Planning, and Implementation

At this point, you will learn about the basics of event planning and management. The role of the commercial sponsorship representative is to seek sponsorships for events and programs. To best serve the sponsors and the MWR activity, knowledge of event planning and implementation are helpful. No matter how great the ideas can be, no sponsor will renew unless they are pleased with not only the end results but the planning process.

Use the following tips and worksheets to refine the systems the installation event team

uses in planning the installations events and communicating these plans to key people.

Systematizing the Approach to Program Planning and Documentation

One way to save time and money is to systemize the way you approach every event or project. The basics to planning are applicable to each project, and an organized approach makes it easy to involve others in working toward common goals.

To make this planning process simple, attached is a basic worksheet to be used as a prototype to create your own planning documents. For a sample *Overall Planning Worksheet*, see Appendix D. As you can see, this worksheet begins with the basics of:

- Event/program name (who, when, and where).
- Event description (overview/history).
- Event demographics.
- Event goals with measurable objectives matched to each goal.
- Project management descriptions.
- Documentation of key details.

Using the worksheet leads you through the planning process outlined in this chapter. As you create your own document, you will customize each section for your own installation.

Setting Measurable Goals and Objectives

The place to begin after the overview is the setting of specific goals, each with measurable objectives. It is critical to set measurements with each goal you create, because then you have a guide as you develop your plan of tactics to be used in the project. You might notice this program goal-setting process is the same as the goal-setting for the overall sponsorship area.

The event or project goals are the results you plan to deliver to your sponsor. It is important to write goals down and to be able to communicate them clearly, because they are the building blocks of your sponsorship packages. For a sample *Setting Goals and Objectives Worksheet*, see Appendix E.

Brainstorming the Possibilities

After the goals and measurements are set, it is time to get creative and brainstorm possible ideas. In the initial brainstorming process, there are no bad ideas. Use lots of people and get a variety of viewpoints. Write down each idea on an index card. Now go back to the goals and match each idea to a goal. Organize all ideas into the goal it supports and analyze the goal to see if the tactic is measurable. Under each goal, choose the best tactics - the ones that fit in your budget and can be accomplished by your staff and volunteer resources. You now have the specific elements of your program. For a sample *Determining Event Needs Worksheet*, see Appendix F.

Developing the Budget

Once you have your tactics, you can create the budget for the project. It is very important to budget for every detail, even if you expect you can get in-kind support. For

your later evaluation, you will want to be able to see the real cost of the entire event and the full value of the sponsorships you obtain. For a sample *Building a Budget Worksheet*, see Appendix G.

Creating the Marketing and Promotional Plan

The marketing and promotional plan is crucial because it contains the elements that are critical to sponsorship value. The plan might include all of the following:

- Communication tools.
- Creative cross promotions within MWR and with sponsors.
- Turn-key promotions.

Communication Tools

The communication tools are all the parts that get the message out to your targeted audiences about the event and how to participate. Such materials may include but are not limited to:

- Event logo and graphics with name and possible place for sponsor name.
- Posters, flyers, table tents, tray liners, mailers, bill stuffers.
- Banners, signage, point-of-sale displays, theme decorations.
- Giveaways such as buttons, hats, T-shirts, jackets.
- Ticket order forms, tickets, ticket-holders.

At the event, you might also need other materials such as more signage, credentials, maps, programs, and on-site promotional flyers. All of these tools are very concrete items that can be assigned values for your sponsorship proposals. It is then critical in the planning to determine the number of each printed item, the placement of all signage, and the distribution of other pieces.

Creative Cross Promotions: Within MWR and with Sponsors

Cross promotions enable you to extend the impact of your sponsorship and give the sponsors extra value. An example of a cross promotion would be the distribution of 2-for-1 ticket coupons at the recreation center in exchange for a recreation center activity/booth at your festival or event. Cross promotions are “win-win” scenarios where both parties get something of value. Many cross promotions are designed by sponsors to fit programs that they have running. Ask your sponsors what has worked in promotions in the past, and begin there to develop your cross promotion plan.

Turn-key Promotions

Turn-key promotions are usually packages that are ready to go. You just host them at your venue and add your own targeted promotions and media support. One example might be a beer company who offers a turn-key promotion for a big sporting event such as the Super Bowl. The beer sponsor might offer a package of signage, banners, games, prizes, and even the entry forms for the contests. In exchange, you agree to a minimum amount of promotion and of course sales of the sponsoring product or service. Like cross promotions, turn-key promotions can be a “win-win” situation as long as you meet your program goals and can follow through with the requirements of the agreements.

The Public Relations/Affairs Component

To complement the communications tools, the next step is to develop the publicity strategy to get the word out to as many people as possible. The good news is that coverage from publicity is “free,” although it takes hours of hard work and follow-through. The publicity plan includes some or all of the following:

- Special letterhead with event logo, name, date(s), and POC (this may also include sponsor logos).
- Fact sheet with basic details, overview, and POC information.
- Press release(s) with the event details in copy form featuring ticket sale pricing and information.
- Reproducible black-and-white copy of the event logo.
- Folder or container to hold the materials, and envelopes to mail the folder.
- General installation and commitment to sponsorship materials developed in the overall planning process.
- Black-and-white photographs of event performers, site, or other details.
- Business cards of POC.

These materials should be organized into press kits and sent to the key contacts who determine coverage in local newspapers, magazines, radio, and television. Be sure you have the correct contact (and contact name spelling) at each media outlet; also, assign a follow-up contact to each person to ensure the information was received and to answer any questions.

These follow-up calls can also be a time to offer on-site press credentials and to meet celebrities and special guests. You could offer interviews with installation leadership or opportunities for special features. Contact with outside media sources should be coordinated with the installation Public Affairs Officer (PAO).

The Media Plan

As part of your overall event, you might want to create a media plan. Without media sponsors promoting your event, you may need to buy TV, radio, and/or print. You might also buy outdoor advertising such as billboards. Ensure that your media plan and advertising is in accordance with the policy in the Public Affairs Manual, COMDTINST 5728.2 (series), and the MWR Manual, COMDTINST M1710.13 (series). In planning media, there are two keys to remember:

- Promotional window.
- Timing.

Promotional Window

The promotional window is the period of time that you actively promote the event. Depending on the circumstances such as advanced ticket sales, discount coupons, and special promotions, this is usually concentrated to a two to three week period. The idea behind the promotional window is to place as much advertising as your budget allows into the time to drive your goals (such as ticket sales and attendance).

Timing

Timing of the planning and buying of media differs with the type. Here are some helpful hints:

- **Print**

Buying print media differ according to the type of publication. Magazines, for example, usually have a larger lead time, sometimes two to three months ahead of the published date. Newspaper ads can be placed closer to the event, but usually they need one week for placement.

- **Radio**

Radio is placed in a *buy*, which is a scheduled run of a pre-taped ad, usually 30 or 45 seconds in a number of time slots. In radio, the sales agent will help you stretch your dollars and target the listeners who are your most likely customers or attendees. Radio value and cost is based on the station's market share, which is the number of documented listeners at a given time, frequency of ads and time of play. Stations usually have a target market with a particular demographic, so choose a vehicle that best fits your event needs.

- **Television**

TV works similarly to radio. TV buys are generally placed with 10, 15 or 30 second pre-taped spots airing for a specified period of time. TV sales agents can also help you target your audience and place your ads. Most broadcast stations have a wide variety of programming available for you to match your targeted audience. Cable stations are more specific, usually catering to one particular demographic.

- **Outdoor Advertising: Billboards**

Outdoor advertising is purchased in *boards*, usually at particular locations that are valued by their size and the traffic that views them. When buying outdoor advertising, remember your target audience when discussing where the signage will be placed. Do not take a billboard if the audience you are looking for will not see it. Also, the companies that place, print, and sell the billboards are usually advertised on the billboards themselves.

Creating the Action Plan

Now that you have all of the details, the next critical activity is to formalize an action plan. The action plan gives each activity a goal date and an assignment of who will complete the action. The action plan is usually organized in chronological order by month, week, and day. On the day of the event, you may choose to go by hour and use the action plan as the beginning to your event script. The key is to communicate every action item and the critical dates for each activity. For a sample *Action Plan*, see Appendix H.

Confirming Roles and Assignments

In acting out the action plan, you might create assignments for staff, volunteers, and other people on the installation. One of the most important jobs is to communicate these specific duties and the expectations of timelines, budgets, and reporting systems to all those involved in your project. One idea you might want to try is to group similar activities into "job descriptions" or "role descriptions." In this process, list all of the activities you need the staff person to do and the dates that are the key deadlines. This document can become a MOU or MOA, if needed, as one of your procedures. For a sample *Job Description Worksheet*, see Appendix I.

Internal Communications Plan

There are all types of people who might need to have timely updates on your planning process. As you involve sponsors, they definitely need to feel like they are “in-the-know.” And the staff, committee, and volunteers all need to know the progress.

There are many ways to communicate, including:

- Themed update sheets or mini-newsletters.
- Basic communication record forms.
- Action lists with assignments.
- Basic meeting minutes or memos.

Choose the style and format that fits your needs. For sample *Communications Record* and *Action List*, see Appendix J and K.

Tips on Project Management

Everyone has their own style of project management. Here are some tips that might be helpful to add to your own management plan:

- Set all meetings at the beginning of the planning process. Try to stay at the same time and same place.
- Keep meetings to one hour. Always have an agenda and keep all action steps on an action list or other document.
- Listen and learn from staff, especially those with experience on your event. Value their advice.
- Distribute notes/action lists quickly.
- Hold people responsible for their commitments; if it’s not done, don’t get mad but instead ask for the plan to meet the goal.
- Bring refreshments to make meetings more fun.
- Increase meeting frequency as you near the event.
- Hold a final briefing for all staff, volunteers, and vendors.

At this meeting walk through every on-site detail and anticipate the worst scenarios and plan for them.

The Secrets of Scripting

The script is the document that covers all event details from setup through completion. The more complete the scripts, the more controlled your on-site management can be.

To create a script:

- State the event name, date, place, and times.
- Begin with the names of every key contact including addresses, business phone, fax, car phone, home phone, and e-mail addresses.
- Create a timeline beginning with setup. Organize a format that is easy to read that includes time, who’s responsible, activity, and notes.
- Record every detail, even if they are at the same time.
- Script all the way through clean-up.
- Attach site maps, radio assignments, entertainment schedules, and other important information.

Distribute scripts to all committee, staff, volunteers, and vendors as needed. At your

final briefing, walk through the scripts. Answer questions and be confident that everyone understands their role and responsibilities.

“At-the-event” Tips

The event is where everything comes together and where Murphy’s Law is in action – whatever can go wrong sometimes will!

Here are some tips for producing the event:

- Manage by walking around. Visit your volunteers. Check your security. Talk to the vendors. Get a first-hand look.
- Use bold signage that is easy to read. Keep signs up high: mark rest rooms, volunteer headquarters, and ticket booths.
- Provide refreshments for staff and volunteers. Have plenty of water and a first-aid kit with aspirin, band aids, and the basics.
- Never forget communications: radios really help.
- Be extra nice to volunteers; they are the backbone of special events.
- Never assume! Check every detail. What you think you said may not have been heard. Write it all down!

Documentation of Results for Evaluation

Although the event is crazy with plenty to do, it is critical to document key details along the way. Documentation is important when you evaluate the project to see if you reached your goals. Documentation helps you understand the timing of the project so you can plan for project growth. It is much simpler to keep track of things when they happen and the process is easy if you add it into your overall system. Items to keep for documentation include:

- Timing and sales figures for ticket sales.
- Copy of all press releases and the publicity they generate.
- Names and contracts of all vendors; notes on their quality and results.
- Event script, maps, and attachments.
- Photographs of point-of-sale displays, banners, promotional signs, etc.
- Copies of all collateral materials (take slides or photographs to keep for files).
- Photographs of event site, all setups, sponsor recognition, VIP area, signage, and activities.
- Committee job or role descriptions; organization of project team.
- Feedback from sponsors, staff, and volunteers (see Chapter 12: After-Action Reports for details and examples).

Through careful documentation, you can best track the true success of your hard work and efforts and build on these successes for future projects. Appoint a volunteer or staff member to observe and record specific information, i.e. number of times the sponsor is mentioned.

Chapter 4 – Sponsorship Strategies

Confirming Your Specific Event Goals and Deliverable Results

To begin the process of actually acquiring sponsors, start with understanding and documenting the specific event goals and the measurable results you're sure that you can provide. The *Overall Planning Worksheet*, referred to in Chapter 3 and located in Appendix D, walks you through the process of answering key questions.

The key here is that sponsors want to choose the most cost-effective and creative ways to reach their business goals. Their business goals usually each have measurements for success. For example:

- **Goal:** To sell a certain brand of phone cards.

Measurement: Number of cards sold.

- **Goal:** To encourage use of credit cards.

Measurement: Number of applicants with credit cards.

- **Goal:** To sell more of a certain beer brand.

Measurement: Sales of brand of beer.

When sponsors can see that you understand your events are business tools to help them reach their company goals, they are more likely to get involved with your project. Remember, only promise what you can absolutely guarantee you can produce. It is very important never to over-promise but to over-deliver.

Defining Success and Specific Measurement Systems

There are two important concepts to consider in the planning stages of seeking sponsors:

- Defining success.
- Setting up the measurement systems.

Defining Success

Once you have set the goals and overall measurements, take a moment to discuss with your event team the definition of "success." It is amazing that many people can look at the same event and see different agendas and priorities. The time to understand everyone's considerations is in the beginning of the planning process, before sponsors are invited to the table.

Setting Up the Measurement Systems

Try an exercise where each member of the event team writes down on a piece of paper what he or she believes the event goals are and how each will be measured. Next ask them to define the qualities of "success." Ask questions like, "What does it look like?" and "What type of comments/feedback do we hear?" Ask them to list what they know the event can do and what they know the event cannot do. Now collect the input and work through the process of comparing everyone's responses. You may be surprised! Don't forget to obtain the command's input for the same questions so you are sure you are on the same track with the entire event and management team.

Why Sponsors Like “Opportunities,” Not Defined Roles

One last but important comment to consider before you prepare to find your sponsor partners is to remember that sponsors like “opportunity,” not defined roles without customization and flexibility. The world of sponsorship marketing is exploding with growth. The good news is more than ever companies of all shapes and sizes are open to investing in sponsorships to meet their goals. The bad news is that hundreds of event planners/producers are asking companies of all shapes and sizes for their resources. Competition is stiff! To differentiate yourself from the competition, consider constructing your packages as opportunities with the flexibility to customize the pieces to fit the sponsor’s specific needs.

Construct your packages as
Opportunities with the
flexibility to customize.

Sample Event: Concert Series

Your goals:

- Provide top entertainment for the audience.
- Underwrite costs with sponsor resources.
- Involve maximum number of people with creative ticket sales promotions.

Sponsor goals:

- Sell product at prominent retail displays and on site.
- Create relationships with top installation leadership.
- Provide VIP treatment for their top staff and other outside clients.

The traditional approach to sponsorship was writing a package to ask for what you needed. In this case, you were putting yourselves first in the equation and putting your benefits before the sponsors’. Another way to approach selling is to put the sponsors’ goals first and offer the “opportunities” associated with the event. Then as you have a meeting, you can ask the sponsors about their goals and which of the possible packages fits their needs the best.

Building Overall Event Equity

The next step in the sponsorship process is actually defining those opportunities and building the packages with the values of the components. In this process, you examine closely each key element that you can provide and the possible value each element may have for sponsors. The following items all build equity in your event: media support, command support, retail opportunities, exclusivity, advertising, cross promotions, title sponsorship, and the right of first refusal. A good place to begin is to list all possible items you can offer your sponsors before meeting with them. For a sample *What We Can Provide to Sponsors Worksheet*, see Appendix L.

Don't forget
the sponsor's
goals.

The Importance of Media and Media Sponsors

Media is an element that most sponsors value because they usually spend large amounts of their budgets to buy it. As you look at your sponsorship packages, begin with the media that you contract to promote other participating sponsors. Try to negotiate the most exposure possible on television, radio, and print, then add the publicity tactics to try to get news coverage. When negotiating media as part of sponsorship packages, remember to document by agreement exactly what the medium is and the retail value of the time or space. Ensure that your media plan and advertising is in accordance with the policy in the Public Affairs Manual, COMDTINST 5728.2 (series), and the MWR Manual, COMDTINST M1710.13 (series).

Each medium has its unique qualities to discuss:

Television. Length of spots; production of spots; talent for voice-over or spot; number of other sponsors to be included; format of sponsor inclusion (logo or name in type); time of play or rotation.

Radio. Length of spots; production of spots; talent for voice; names of sponsors and or products to be included; play schedule.

Print. Size of space for ad; number of colors of ink; format of ad; placement of ad; production of ad; use of sponsors names and/or logos.

It is critical to discuss and agree to all of the media details in the beginning of the sponsorship process. Because media is easy to measure in value for the sponsors, it is critical to build equity by obtaining a media sponsor that will help gain the exposure to the masses needed for a large-event success. In asking for media sponsors, it is important to do your homework.

Consider the following questions:

- What format of media (TV, radio, print) best communicates with your target audiences? Gather all the demographic information from each potential sponsor. Understand who they advertise to and what they want to do with your same audience.
- What type of timing do you need? A magazine's deadlines might not fit the timing of an event's available information.
- Consider the relationships you have with the potential sponsors. Do you have "friends" on the inside to work with, or are you starting from scratch? If the relationships are not in place, START NOW! Build relationships when you are not asking for support and the asking will become much easier.
- Think through the "promotional window." What is the optimal time to promote the event and associated activities? Your media sponsorship proposal needs to ask for a value of media, of a certain type, in a specific promotional window.
- Set the value of the media fee at the retail price of buying the media. This lets the media sponsor get "credit" for their regular retail rate.
- Include in the request the ability to credit other major sponsors. This is critical for reselling the value of the media on to other cash or in-kind sponsor(s). The ability to include other sponsor recognition in logos or in audio mentions is critical in the negotiations.

Command Support and Involvement

As the *What We Can Provide to Sponsors Worksheet* (Appendix L) highlights, some

sponsors want to build relationships with installation leadership. It is then critical to your planning to define the level of support you can count on and what their “support” really means.

Understand the following issues:

- Who in the top leadership will actually be involved in the project?
- Will they be active in activities like announcing the event and sponsors? Will they personally sign sponsor request letters? Are they comfortable with their role?
- Were key people invited to be involved early in the process?
- Who is available and scheduled to attend and participate in the actual event? What specifically will their roles be? Will they spend time with the sponsors on-site? Will they be in the VIP hospitality area?

These answers are all critical in putting together your deals and promises to your sponsors.

Retail Opportunities with CGES

It is important to bring the MWR retail partner, CGES, into the event early in the sponsorship planning phase. Companies are trying to sell more product and sponsorship is one of many ways to achieve their goals. If guaranteed display space in the exchange can be offered to potential sponsors, the value of the sponsorship of your event or program increases. Local CGES managers have some latitude in determining the display space of their stores. Factors that can influence the local managers and prevent them from assisting are mandated national buys, small stores or display areas, product not currently carried in the store, and competing product lines with guaranteed display space. By developing a close working relationship with your CGES manager, these problems can be overcome. A significant portion of MWR funding comes from the revenue generated by CGES. Bringing off-post retailers, through sponsorship, on-post to advertise their services adversely affects potential sales and MWR funding. Remember, you must coordinate with CGES on your sponsorship initiatives to prevent conflict with existing CGES agreements.

Develop close working
Relationships with the
exchange managers.

Category or Product/Service Exclusivity

Another valuable sponsor opportunity is to offer product/service exclusivity. Exclusivity can be offered as part of the sponsorship menu of benefits. However, during the solicitation process, you must contact more than one company (a minimum of three is preferred) in each category. This gives each company an equal chance to compete for sponsorship of your event or program.

Product/service exclusivity most directly integrates the sponsor’s product or service with the event and the host organization. *Exclusive* in this case means *only* and refers to the one product in a category that is offered and promoted to the attendees.

An example of exclusivity that is very valuable to a sponsor is the brand of soft drink offered at the event. On a hot sunny day, the *exclusive* sponsoring soft drink company will easily sell and sample all their available products, thus building brand loyalty and/or introducing new customers.

Packaging with Advertising

Sponsors are looking for the maximum value for their investment. One way to add value is to package it with installation advertising. Creating a package that includes such benefits as advertising space in the local MWR newsletter, on electronic signboards, or in a flyer rack at the ITT office or other MWR facilities, increases the value of your sponsor benefits package. It also introduces your sponsor to the full range of advertising opportunities available on your installation.

Regional Cross Promotions and Advertising

Adding to your base package can be creative cross promotions that can bring additional advertising and exposure for your event and sponsors. These packages all are determined by the timing of your event and the relationships you have with other contacts who can work with you toward common goals. The one thing to consider is not to promise sponsors the possible cross promotions or the value of these deals. When you then do the extras, you are *over-delivering* results to your sponsors. Over-delivering is great for building on-going relationships, trust, and happy sponsors who renew their commitments.

The Other “Stuff”

Finally, diagram all the other “stuff” that can be part of your package. As stated previously, the *What We Can Provide to Sponsors Worksheet* located in Appendix L, highlights a chronological way to think through the other possible elements such as tickets, signage, sampling, and so on. Record the specific details of each area. Add new areas specific to your installation. Create a listing of items and the retail “value” if the sponsor had to purchase the privilege.

Creating Levels of Sponsorship

Once you have all the potential package pieces, it is time to put together the sponsorship sales packages. Again, you should sell opportunities, but frame them in levels of involvement.

Title or Presenting Sponsorship Level

The top level of sponsorship is usually the *title* or *presenting* sponsor. This is the level reserved for the very few who give the most support. This level is oftentimes only reserved for the television sponsor, possibly print sponsor, and major cash underwriter. Sponsors at this level get the maximum value you can develop from all of your possibilities and are usually mentioned in the promotional media. The title or presenting sponsors are sold first to anchor the event funding and to create the key planning team members. These major “investors” bring with them their specific goals and it is your job to document them and exceed them.

Host and Supporting Sponsorship Levels

Once the top sponsors are secured, you can move into the lower-level packages. These sponsors offer cash and/or in-kind support and receive less opportunities than the major sponsors. Again, design a list of possible items that a sponsor may choose from at a certain level and add the amount of support needed to pick from that level. The *host* might be the second level under the top, with the *supporter* having the lowest level of sponsorship fee and advertising and promotional support.

Sub-activities Within an Event

Looking for ways to involve more sponsors without cutting the value of the basic sponsors? One idea is to identify sub-activities or theme areas inside the event. Look for areas or activities that bring together a certain type of attendee or that are focused on an activity that could fit a sponsor's goals.

For example:

Event: Festival with games, food, arts, crafts, and entertainment.

Sub-areas for sponsorship:

Area

- Kids activity area
- Entertainment stages
- Clean-up area
- Sports activities

Possible Sponsors

- Toys, games, cereal companies
- Radio station
- Paper towel company
- Sporting goods line or store

These packages are usually pitched as “on-site” only to stay out of the way of cluttering the higher level sponsors. This is *the place* to be creative and do trades of space at the event for all types of resources you need to help your bottom line. Remember the golden rule: Ask first what the sponsor wants and then what they can do to help you get it.

Smaller Events and Promotions as Sales Tools

What do you do with all the “population-challenged” events? Who will sponsor the installation activities that are not going to draw media and other pieces of real value? One idea is to use the smaller events and promotions as sales incentives for the bigger deals. Remember in Chapter 3 you learned the importance of internal outreach to understand all the programs and events that can possibly be sponsored. Then, when you go to sell, see if you can offer a “bonus” of a free event or project sponsorship if sponsor does what you need. This could be an incentive to sign a quick letter of agreement or to provide extra in-kind resources. You benefit by getting the maximum for your larger events. The smaller events benefit by the exposure of having the “big guys” as their sponsor. Association with recognized larger sponsors often brings credibility and the ability to bring on smaller sponsors for the smaller events. In this scenario, everyone wins.

Packaging of Similar Events

One idea to think about when planning smaller events or events with low participation is to group them together to form an ongoing promotion or series of events. Usually, this series is tied together by some similar element such as:

- Same venue.

- Same special target market such as children or families.
- Same theme such as sports, fitness, art and crafts.
- Same time of year such as summer, holidays, tax time.
- Themed around a big event such as the Super Bowl or NCAA Final Four basketball.

Be creative in this process and see what you can come up with. Remember to think of maximizing sponsor benefit and producing sponsor measurable results.

Documenting Your Target Market

Sponsors look to promotions and events to be effective tools in reaching their company goals. As sponsors approach an event opportunity, they know their current customer mix and want to find the fastest way to reach similar customers. One key factor that sponsors must know are the details of your target market. The target market is defined as the people that will participate in the event or activity. In looking at how to describe the participants, you can describe:

- Demographics
- Psychographics
- Expected attendance or participation

Demographics

Demographics is defined as the statistical study of human populations especially with reference to size and density, distribution, and vital statistics. Demographic segmentation breaks down the market by characteristics relating to the consumer:

- Age
- Income
- Sex
- Occupation (rank)
- Education level
- Marital status
- Status (active duty/reservists/Auxiliarists/retirees/civilian)

This type of study can help you understand the differences in consumer needs and behavior. It can also help a marketer determine who is using products/services and how consumers can be targeted with additional or modified effort.

Psychographics

Psychographics is defined as the statistical study of human population especially with reference to mental life/activity and behavior. Psychographic studies break down the market according to behavioral characteristics of consumers, including:

- Opinions
- Attitudes
- Beliefs
- Activities
- Interests

An example of a psychographic study would be to monitor if the attendees are “health-

conscious” or not. Attendance and usage information from MWR facilities could provide insight into developing a psychographic profile.

Expected Attendance or Participation

Attendance is the actual number of people you can expect to attend. It is best when you have a track record or event history to base this estimate on, but first-time events may have to estimate these numbers. Some helpful hints on determining your crowd sized include:

- Be sure you plan up front how you will count and who is responsible for estimating the actual size. This should be a source credible to sponsors such as police or officials.
- Create the tracking system for counting such as saving ticket stubs or counting at each entrance gate.
- Never over-promise attendance; if you do not know and have no record, use words like “expected” or give a range.
- Research other similar events and look at their numbers to gauge your potential draw.

Never

Over-promise attendance.

Finding Potential Sponsors

Although it seems like any company in the world could be a sponsor, there are some characteristics that make a “suspect” more of a “prospect.”

Where to Begin

Begin by asking the following questions:

- Who do we currently have relationships with? Who has sponsored something at this installation before?
- Who has targeted the Coast Guard for business? What specific products and services did they sell to us?
- Are there any national contracts that affect this sponsor?
- What leads do you have from CGES or the other people on the installation? Has anyone ever approached you to discuss on-base opportunities?
- Are these advertisers who want more than they are getting? Could they be approached to add events to their strategy?
- What are the most used products and services on the installation? What is hot and could want more exposure? What is brand new or upcoming?
- Who is geographically located near you that has a presence in the civilian community? Who sponsors events outside of the installation?

The first and easiest place to start is to call on sponsors who are already involved and successful in the Coast Guard market. If you do not know the contact, it is great to get a personal introduction to a contact.

Research • Research • Research

Once you have looked around to see what products or services fit the event goals and offer value to the sponsor, it is time to uncover the key contacts.

Research can take many forms, from reading local newspapers, to cutting out ads of

events and promotions, to going to the library to find out more background about the companies you want to meet. Some places to look for contact names for sponsorship include:

- Unit Newsletters
- American Logistics Association Member Directory
- Million Dollar Directory
- Standard & Poors Register
- *PROMO Magazine*
- *BrandWeek*
- *AdWeek*
- *Advertising Age*
- Local phone books or lists of businesses; Chamber of Commerce Directories; and service club directories

Matching the Correct Contact to the Program or Event

The key to success in sponsorship sales is finding the contact who has responsibility for your level of involvement and your geographic area. This means that the “Gillette” contact listed in a national directory is not likely to be the one assigned to military marketing. This also means that although there may not be a military marketing division in a smaller company, there is probably a geographic representative for your area. Going after the wrong contact is a huge waste of time for you *and* them, so make some calls to the offices to fine-tune your contact.

Remember, depending on the size and type of your request, you may fall into special circumstances for sponsors. Very small requests do not make sense to a national office who only handles the BIG DEALS that have a national scope. It is safest to begin with the local contacts in the nearest civilian community and to build your relationships there first. Once you have made a local contact, you can move higher into the organization if your request warrants a different path.

Be friendly and ask for help from the clerical staff and lower-level assistants on how to contact your potential sponsor. Never demand a meeting or be too pushy. Just ask for the correct path to send a professional presentation and call to request 15 minutes to discuss the possibilities and how the Coast Guard market can meet their goals.

Strategic Selling: The Importance of Relationship Building

As you can see, the more contacts and relationships you have, the more successful you will be in sponsorship development. No matter how great your events are, or how valuable the packages, you must get the chance to be considered, and that piece is the toughest part of the game.

Tips on Networking

One way to build these relationships before going in for the sale is to attend functions and join groups where you might meet these contacts. If you remember that both parties are working toward meeting their own goals, you can forget the “hard sell” and work on the friendships first.

Some tips for networking and meeting new people include:

- Carry plenty of business cards, but don't carry your proposals or brochures; you can send them later if needed.
- Look at people and extend your hand to shake. Introduce yourself as "name" from "Installation." At first, don't worry about your titles or what you do. Give a smile and really listen to the name and organization.
- Ask questions so that the new contact talks about themselves. Listen to their conversation and acknowledge that you are interested in them. Ask what types of things they do or where they grew up. Look for topics or people that you have in common.
- At the end of the conversation, exchange business cards and offer to be their POC at the installation if they ever need anything. While the conversation is fresh in your mind, write "cheat notes" on the back of the business card. Write down things or people you have in common or anything from the contact's comments you might want to remember. Be sure to date the business card and write down the place you met.

Ask questions so new contacts talk about themselves.

After you return to the office, write a personal note to the contact saying that you enjoyed meeting them. Remember, your goal is to build relationships so you can have the conversations to understand the types of things sponsors need and how your events can work for them.

Creating Working Partnerships

The most successful sponsorships are partnerships between you and the sponsoring company. It is important to express to those you approach this "win-win" philosophy. In the tough competition of every industry, the winners are the ones who maximize all their resources. Bring returning sponsors in for a brainstorming session on the proposed event. Let sponsors explain what event changes need to be made to help them reach their goals. Not all their ideas must be implemented, but make changes where you can. This builds the feeling of ownership that a sponsor has for a property. The more you give, the more you get. And the more you communicate the partnership philosophy, the more your business friendships will work for you.

Educating Sponsors on Military Opportunities

Remember, it might take some educating to explain to first-time potential sponsors the value of the military community and the captive audience you have at your activities and events. Do not assume anything, from general knowledge of the status of the Coast Guard to the specifics of what you do on your installation. Create a general fact sheet on your installation to use with your sponsorship materials. Include the basics such as:

- Installation official name.
- Population with breakdowns by age, sex, and rank.
- Specialties or focus areas.
- Interesting awards, participation, or other facts.
- Names and rank of top leadership.
- Names and dates of major programs.
- Sponsorship POC with phone, fax, and e-mail.

Be sure that any information you provide is properly cleared with the command.

Systems for Management, Documentation and Evaluation

Anything you promise a sponsor becomes a business contract. These agreements hold the sponsors to the support you need, but force you to fulfill every promise. As you are working through the process of developing packages and meeting to negotiate deals, stop at each goal and ask, "How will we measure this?" It is very hard to reconstruct the facts after the event. And the documentation of all the important facts takes an organized plan. Create a system from the beginning to track all details of your sponsorship program. Create a coded database of all the people you meet. Send these contacts a newsletter or updates to continue the relationship. Create paper files containing your research of other events and their sponsors. Record each time you interact with the sponsor and the details of the conversations. Continue to refine the planning process to be sure that the documentation systems are in place and carefully managed. These are keys to over-delivering for sponsors and insure success.

Internal Command Communications

Let your command know about your focus on professional sponsorship development and the critical time it takes to develop relationships that lead to deals. Consider producing quarterly executive summaries of the progress and the targets of your search. Remember to continue to encourage your sponsorship team, if you have one, to network and build relationships. Just code your overall database by the staff contact name. Again, the goal is to involve all of the installation resources in helping to meet the sponsorship program goals.

Fulfill all
promises made
to sponsors.

Chapter 5 - Sponsorship Benefits/Return on Investment

Providing Sponsor Benefits

Let's take a closer look at what sponsors might be looking for and examine all the components you can use on the installation to create value. This chapter works right along with the sample *What We Can Provide to Sponsors Worksheet*, first referenced in Chapter 4 and available in Appendix L. Remember, these are guidelines to get you started, but you will want to create a customized worksheet for your installation to include your own specific details.

Organizing Your Benefit Program

One way to organize how you think of sponsor benefits is to begin with the intangible, then think chronologically through pre-event, at-the-event, and after-the-event opportunities. One thing to note is that valuing sponsorships is not a science. No single rule applies across the board as to what sponsors consider of value to them. Many times, sponsors have multiple activities running at the same time in the marketplace. For example, the results caused by paid advertising in the civilian market may not be distinguishable from the impact of your event sponsorship, as it too reaches into the surrounding civilian market. Again, the sales strategy of the menu of "opportunities" generated from sponsorships is essential, so that sponsors can choose the elements that they value the most.

Intangible Benefits

Intangible benefits are defined as benefits that are intrinsic with the sponsorship package, yet sometimes tough to measure specifically. Intangible benefits include and are not limited to:

- Creating good-will to impact brand loyalty.
- Exposure to Coast Guard leadership.
- Positioning to the civilian market.
- Impacting of specific results in the narrow military segment.

Creating Good-Will to Impact Brand Loyalty

How do you measure good-will? How do "friends" of the Coast Guard benefit from the measurable results of product and service sales? Without the money to do extensive benchmarking of the Coast Guard market pre-involvement attitudes and preferences, this intangible result is best covered by meeting the action tactics agreed to by the sponsor.

For example:

Sponsor Goal: To create a relationship building good-will with the installation population to encourage use of their long distance phone service.

Action Tactic: Provide a time to run a promotion for "free calls home on the holidays" positioned as the "gift" by the sponsor for the good of the installation and its families. Tie event promotion to this activity. Although the "good-will" part is hard to measure, the tactic of the good-will activity can be measured by:

- The completion of the promised activity.
- The number of participants in the activity.
- The impressions created in the promotion of the special activity.
- Any free publicity generated by the activity.

Exposure to Coast Guard Leadership

Again, this intangible benefit can be assigned action tactics to ensure that you have used your best efforts to reach the sponsor's goals. This area of exposure to leadership and the tangible results of such exposure is related to full and open communications with leadership through the entire sponsorship program development. Coast Guard leadership that understands there is sellable value in their interaction with the sponsors at kick-off press conferences, receptions, and onsite at VIP hospitality suites are an important part of your team. Be conscious of the level of support the installation leadership feels comfortable with giving your projects/events. Remember, under-promise and over-deliver such participation so sponsors are not disappointed.

Positioning to the Civilian Market

Some sponsors might seek involvement with the Coast Guard as their expression of "the right thing to do to support the Coast Guard." Although you cannot sell this association as part of your packages, sponsors do have the opportunity to use the news of their support of Coast Guard projects in their company's public relations outside the installation. For example:

Project: Collection of sporting goods for the installation youth service program.

Sponsor goal: To increase awareness of sporting goods targeted to the pre-teen or teen market in the United States.

Tactic: For each new sporting good bought, sponsor will provide a new sporting good for the youth services sports program.

Results: 300 new pieces of sporting goods collected to augment the youth services program.

The sponsor now has the opportunity to say, "Sponsor brings smiles and fitness to installation's youth" and to note their role in the collection of the sporting goods. The sponsor would hopefully derive from this press release positive free media coverage in not only the military but the civilian community as a friend of the Coast Guard and to the Coast Guard's youth.

Impacting the Narrow Military Market

Another strong benefit Coast Guard sponsorships have is their ability to be tightly focused on their marketplace. With their own retail system, CGES, many residents spend their dollars on-base. Sponsors involved in your programs that realize the potential for sales in military communities can cause substantial impact on your audiences. In cooperation with CGES, you can develop displays, sales, promotions, and coupons to drive specific product sales. And with your installation media, you can complement our promotions with maximum coverage, thus touching the greatest extent of your population.

Again, how the narrowness of your market and the results you can provide are valued

by the sponsor is individual in each sponsor's goals. This is why, especially in small or new events without a track record, it is important to keep this as intangible, rather than guaranteed.

Pre-event Tactics

In looking at more measurable tangible benefits, you can examine the chronological path of the event to find the values. Again, many tactics flow through all areas from planning through completion, but the chronological system will give you a place to start. Pre-event tactics are the points of exposure before the actual event begins. This is an extremely valuable area, because this is when you do your publicity, ticket sales, cross promotions, and advertising. Without strong results in the pre-event activities, you may not achieve the event results you desire. Pre-event tactics that are valued by sponsors include:

- Logo recognition on collateral materials.
- Brand or product exclusivity.
- Positive publicity.
- Point-of-sale merchandising and promotions.
- Advertising.
- Cross promotions.
- Exposure at MWR activities.
- Signage: Billboards, electronic, specialty.

Logo Recognition on Collateral Materials

Sponsors at your highest levels are buying the maximum exposure to the marketplace in the closest association with the event. One way this is achieved and easily communicated to the consumers is by actual use of the sponsor logo on all collateral materials. Collateral materials are the pieces that promote the event including but not limited to:

- Posters, flyers, on-site programs, brochures, and other printed materials including table tents and tray liners.
- Tickets, coupons, point-of-sale displays.
- T-shirts, hats, cups, mugs.
- Banners, street signs, and stage backdrops.

Some key points to remember when using the sponsor's logo on collateral materials include:

- Be sure you have the correct logo and the specific rules to the way it is used. Sponsors are very particular about positioning, logo size, and color. Get the PMS color system numbers to ensure you match colors correctly. Discuss with the sponsors and document if the logo needs to be used in black and white or in another color due to the theme colors of the event. Let sponsors decide the color choices so they are happy with the results.
- Remember to relate the size of the logo to the level of the sponsorship. Top sponsors get the top size, and like-level sponsors get the same size. This is a bit tricky with sizes and shapes of logos, so be careful here.

- Be sure the logo is readable at the size it is used. You might want to include sponsor “mention,” not “use of logo” in your sponsorship packages, so you have the freedom to use the printed sponsor name which can fit in a smaller space and probably can be any color.
- Whenever possible, make it your policy to have the sponsor approve the proof or layout of their logo usage. This stops any misunderstandings before they happen.
- Keep track of every item that is used and the specific numbers of each item. This quantity can be valued as the number of impressions for the sponsor.

Brand or Product Exclusivity

In the civilian community, title or presenting sponsors oftentimes get the value of being the exclusive brand or product in their category. This means, for example, that only one brand of soft drink would be sold if the soft drink company was the event sponsor.

Because only one brand of soft drink is sold, it's likely that the event will generate sales and possibly sampling of that particular brand. This exclusivity ensures actual product exposure and connection to the audience. What is the value of “exclusivity?” Again, this value is a bit intangible in the aspect of not knowing the final results until after the event; there are usually not systems in place to track how brand sampling or exposure affects the long-term choices of consumers. You also can rarely isolate the exposure of only your event from any other exposure, unless it's a totally new product/service offered solely at your event.

The value, then, of exclusivity is first looked at from the angle of the sponsor's goals. Exclusivity positions the sponsor as dominant and creates a market leadership perception. Next, look to the potential for bottom-line results in sales and sampling. How many consumers will be reached? What impressions can the event and associated promotions make that general advertising cannot? What type of relationships will the prominence of this brand in the event create for the brand sales force? How will it help the brand sales force agree to more deals in the military marketplace?

Usually exclusivity is not assigned a hard number, but is the right given to top-level sponsors to protect their investment in the event. It is the intangible event value that lays the groundwork for the very tangible results of sampling and sales.

Positive Publicity

Publicity is defined as an act or device designed to attract public attention. One value usually promised in conjunction with sponsorship of the event is the association of the positive event publicity to the sponsoring organization. But publicity is tough to guarantee because it is the news story behind the involvement, not the promotional copy for the sponsor.

Exclusivity is a negotiable sponsor benefit.

Here are some ideas for generating close connections of the projects with the sponsor and laying the groundwork to associate the sponsor with the positive publicity generated by the event:

- Always use the presenting or title sponsor's name the same way in affiliation with the

event. For example: “The Coast Guard Academy’s July 4 Festival ***presented by sponsor.***”

- Create a special theme news release letterhead featuring the sponsor’s logo and event name or logo.
- Have the sponsoring organization send out news advisories to their established media contacts to tell the same story you are telling. Sponsors can use their letterhead which is recognizable to their media outlets, many of whom are advertisers who get special attention.
- Host a kick-off press conference with a news angle such as a celebrity tie-in which focuses attention on the sponsor and their positive role. This kick-off might involve Coast Guard leadership.
- Use quotes from the sponsor in event press releases and be sure to mention the sponsor in all follow-up conversations.
- Be sure that all installation media understand the importance of high sponsor visibility and positive association in their coverage.

Point-of-Sale Merchandising and Promotions

In the Coast Guard, all pre-event, point-of-sale merchandising and promotions are arranged in conjunction with CGES. It is critical to begin the planning process with the exchange managers well before any sponsor packages include such promises. Again, there are no absolute rules on the value of merchandising and promotions.

The value depends on all types of factors, including:

- How often would the product or service be highlighted with a sponsorship involvement?
- How much market share does the brand already have with the installation? Where does the market brand compare to it’s competition?
- Is this a brand new or existing product?
- What type of advertising budget is already invested to target the military community to drive sales?
- Does the sponsor have the materials to work on the extra displays or promotions or have the ability to finish them to complement the sponsored event? Is this expense for materials in their planning?
- What would the price be if the sponsor had to buy the opportunity to have the potential product displays or positioning that sponsorship can provide?
- How much exposure of the brand logo will the special promotions and merchandising provide? This is related to store traffic, display size, length of promotion, and collateral materials that can be used.

As you can see, there are as many questions as there are answers in assigning hard numbers to the retail-related opportunities. Work with the exchange manager to determine your estimates.

Advertising

Advertising is a medium that is traditionally measured, so finally you have a place to look for more concrete value estimate. Each medium of advertising has its own

measurements for value:

- Television - Viewership
- Radio - Listenership
- Print - Circulation

There are services that check the estimated viewership, listenership, and circulation.

These figures can be used to calculate gross impressions, which is what is valuable to the sponsors. Gross impressions tell them how many times their logo was seen by the general public.

Each type of advertising is targeted to specific audiences. The clearer the target and the more successful the medium is in delivering actual results, the more money it costs to buy it and the value it has. Advertising tends to be one-dimensional. You see it or hear it. Events tend to be multi-dimensional. You taste them, smell them, hear them, see them, and touch them. Advertising, therefore, can be “extended” by the use of events to add to the advertising impact. For example:

Situation: Car dealer wants to introduce new line of sport utility vehicles targeted to sell to men ages 21 - 34.

Advertising: Shows photos of the car (print); describes the car (radio).

Event tie-in: By sponsoring an installation event, the car dealer has the opportunity to bring vehicles to the event site and actually let people sit in the cars, hear the stereos, and test drive the vehicle.

Additional Tactics: Sponsor will register anyone who test drives the vehicle for prizes; sponsor will offer a coupon for \$500 off the purchase of the car for a limited time after the event.

The value of the advertising is the retail value it would cost a sponsor to buy the package. Each medium will have advertising rates and target market documentation for you to work with and their internal staff can usually help to design overall packages.

Cross Promotions

An important part of event marketing is the organization of cross promotions of the sponsors and the event. This tactic is most valuable with the participation of media partners who are contracted to include the event sponsors in all promotions. In advertising, the buyer controls the entire message and can dominate the space with their agendas. In cross promotions, the sponsor’s presence fits into the context of the promotion of the event and often of other major sponsors. The exposure then for the sponsor is that of exposure as an event sponsor, not solely for their advertising or product-specific message.

When you value cross promotional media, start with the retail value contracted in the media sponsorship. If the media sponsorship agreement is structured properly, you should be able to guarantee a minimum amount of exposure over a defined time period. Use the retail value of what it would cost to buy the media in your overall package value estimates.

Exposure at MWR Venues and Activities

Exposure is exposure, and exposure of any type builds the number of overall impressions which has value. Therefore, it is valuable to include with sponsorship packages all the opportunities at MWR events and activities.

One way to add this element to each package is to standardize the opportunities on-base to promote sponsored activities and the number of impressions this promotion can generate each quarter or each month. For example:

- The Coast Guard Academy has a highly successful Sports Dome which is a hub of activity and draws certain monthly attendance figures.
- The Coast Guard Academy might choose to have an area that each month promotes the installation events and their sponsors to the people at the Sports Dome.
- The Coast Guard Academy might have numerous other sites on base that have frequent visits which can be estimated and have space to promote events.
- In addition to space inside buildings, The Coast Guard Academy has other opportunities such as other events, outdoor display spaces, and bulletin boards.
- The whole package of exposure can be grouped together under the area of MWR venues and activities to add numerous impressions for the sponsor.

Signage: Billboards, Electronic, Specialty

Signage brings sponsor value from exposure and the positioning and awareness such exposure brings. Signage includes communication on a large scale in mediums such as banners, billboards, electronic signs, specialty signage, and inflatables. Again, because signage is commonly sold, you can find the sponsorship package value by beginning with the retail price a sponsor would pay to buy the same space and duration. This price is based on the combination of positioning, readability in day and night settings, traffic count near the signage, and memorability of the message.

Sponsors might already have purchased signage (such as billboards) that they can “tag” with the event message. Many larger national sponsors sign yearly signage contracts and have an inventory of spaces that they use. The tagging of pre-existing billboards would of course then be a value that the sponsor brings to the table to complement their contribution of cash or in-kind services.

At-the-event Tactics

Major top-level sponsors generally get exposure from planning through post-event activities. Some smaller-level sponsors only receive value at the event. Some tips for tactics that can add sponsor value to the packages include:

- Event program advertising
- Coupons
- Sampling and selling
- Consumer research
- Public address announcements
- VIP hospitality and associated perks

Event Program Advertising

One publication the event producer usually controls is the program. The program then becomes a very valuable piece to the sponsor package because you can deliver exactly what you promise. Some of the components that make an event program valuable include:

- Distribution: How many copies will be distributed to whom and when?
- Level of exposure: Where will the sponsor be highlighted? Can they be in the most valuable places such as the back cover, inside front cover, or center spread?
- Is the program free or for sale? Is there pre-event distribution via direct mail or another way to maximize exposure?
- Will the sponsor be publicly thanked in the program by Coast Guard leadership?
- Will there be space for advertorial (editorial with an advertising spin) for the sponsor to recommend their product or service?
- What is the quality of the program? What type of paper stock and what types of inks? Color or black and white?

You can create advertising rates for an event program similar to a traditional print publication. Take into consideration the number of copies, the delivery to the audience, the life of the piece, and design rates valuing the special positions. Use your rate card of retail costs to buy the space as your sponsor value.

Coupons

A sponsor involved in an event can use coupons to drive product sales both at the event and after. At the event, each participant and spectator might get a coupon specifically pointing out product benefits and telling them how to immediately purchase. The coupon could further drive traffic by offering a gift with the purchase or an activity to participate in at the event site.

Coupons can be printed or coded to be tracked back to your event to document the event impact. The new business directly generated by you and your activities is extremely valuable. And as the event grows, it is important to find tactics to raise your impact for sponsors. Again, all retail deals must begin with your CGES manager and must work into their current agreements and ability for tracking.

Sampling and Selling

Sampling and selling are hot buttons at events. As mentioned in the coupons section, many times a sponsor's goal is to push product sales at the event to generate the revenue they have paid to you as a sponsorship fee. Ensure that any product sampling and/or resale are conducted in accordance with policy in the MWR Manual, COMDTINST M1710.13 (series) and the Nonappropriated Fund Instrumentalities (NAFI) Manual, COMDTINST M7010.5 (series).

If the sponsor has a new product or wants to conduct some consumer research, they may be interested in sampling at the event. Sampling usually involves a much smaller portion size than would be sold, and hopefully does not cut into your profits from product sales. Some tips about sampling include:

- Designate specific areas for product sampling separate from sales so the customers do not confuse free products from concessions.
- Use bold and easy-to-read signage in the sampling area, with any qualifiers such as age, number of samples per person, and so on.
- Consider if you will need a gimmick to encourage sampling, such as a giveaway or valuable coupon. Will the free samples alone drive the desired amount of traffic?
- Plan ahead if there will be more than giving away the product for a free trial. Will there

be customer interviews? Who will conduct the research? What tools or support will they need from you?

- Product sampling of alcoholic beverages is not authorized.
- Determine at the beginning the sponsor's specific expectations and the role each of you will play. Again, under-promise and over-deliver!

To prevent confusion
separate sampling and
sales areas.

Consumer Research

Research in conjunction with product/service sampling is an interesting way to involve customers with experiencing a product and capturing their immediate reactions. Even without sampling, an event can be the perfect venue for a sponsor to capture general consumer research.

There are many ways to capture consumer's opinions from the friendly interviewer with a clipboard to the new high-tech, automated interactive kiosks. Again, sponsors probably have the agenda for the type of research that they value and their preferences of how to conduct such research. If you want to provide research for your sponsors or for yourself, companies are available who specialize in professionally gathering and measuring this data.

Public Address Announcements

Looking for even more meat to add to packages? Add scripted public address announcements to your mix. It makes sense that sponsors want and deserve the maximum exposure possible during events. You can give them exposure by using announcements at planned intervals to drive specific activity (for example: "Be sure to check out booth #32 with....") or continue to build general awareness (play the general product radio commercials tagged with event sponsorship information). Again, the value here is in impressions at the site. The verbal impressions complement the visual presence to make a powerful mix.

VIP Hospitality and Associated Perks

On-site is where the sponsors and the sponsors' guests can get true VIP treatment. Again, this is an area that you can control what you offer and provide what you promise. VIP hospitality may include the following elements:

- Special parking privileges near the site.
- Commemorative credentials to give access to VIP areas.
- Opportunity to meet and take photos with celebrities.
- Access to a special area, sometimes under a tent, to have free food and beverages during the event.
- Special VIP gift packages with giveaways or sponsor products.
- Special priority seating for the actual event.

Many times sponsors will use their opportunities for VIP hospitality at events to pass on

to their clients or sales staffs. The key is to make the sponsors and their guests feel very special and gain additional return on their sponsorship investment.

After-the-event Tactics

After the event, there are other elements that sponsors value. Some of these elements include:

- Right of first refusal.
- Mementos and recognition items.
- Coast Guard publications' publicity.
- Positive word-of-mouth advertising.

Right of First Refusal

One sponsor benefit is to change an event into an annual tradition. To protect the investment of sponsors who support events in the early years and want to stay involved as the product in their category, there is the right of first refusal option.

The option for right of first refusal of the next year's sponsorship package at the same level protects the sponsor's right to renew. This option usually has a cut-off date for sponsor commitment fairly close to the completion of the event to protect the property from sponsors holding their category and not renewing. The more popular an event is, the more valuable holding the top-level sponsorships become.

The value of this option then depends on the property history and the demand for sponsorship opportunities. Rights of first refusal are often offered to top-level sponsors to encourage the development of long-term plans and commitments for mutual successes.

Mementos and Recognition Items

Other items that sponsors enjoy as extras are collectable mementos and special items of recognition. Mementos can be tangibles such as signed CDs from your entertainers or event posters autographed by the stars. Recognition items can be framed letters from your commanding officer, installation coins, or other military memorabilia. These are thank-you items that add to your ability to continue your sponsor relationships and are not items you show as value in your pricing.

Coast Guard Publications' Publicity

After the event, sponsors enjoy the extensive coverage that can be provided by installation publications. This coverage can be valuable in your package if you can pre-determine the extent of the coverage and the value that coverage has in the installation medium.

Positive Word-of-mouth Advertising

Another benefit of successful sponsorship is the positive word-of-mouth advertising for the sponsor and its product or service. Word-of-mouth advertising is an intangible result that shows itself later in product sales.

Documentation and Measurement

The entire sponsorship process depends on setting specific goals with measurements assigned to each. The value for sponsors only occurs after the goals are met and the results are documented. Be sure that for every promise you make, there is a system to deliver and to manage the measurements of the results. Be realistic about goals that are intangible and are not measurable, and be honest with sponsors when you discuss realistic expectations. Remember that it takes time and money to gather information so you can set the baselines to measure results. If you do not have the baseline to measure against, set other ways to measure results. Always put the details in writing to avoid misunderstanding or unmet expectations.

Why Do Sponsors Renew?

Sponsors renew their relationships when they feel they have achieved Return on Investment (ROI). They need to know that the deal was worth their time and money. ROI is achieved when the sponsor has reached their goals that were set for the sponsorship as mentioned previously. Even if an event was systematically perfect, the sponsors need to feel they were treated with special attention. Listed below are some reasons a sponsor may renew, and at times, these types of criteria are the deciding factor in a sponsor's renewing decision. You want your sponsors to agree to these statements:

- Overall event met their expectations.
- Event staff was professional and courteous.
- Event paperwork was concise and easy to understand.
- Event billing was timely and simple to follow.
- On-site production team managed details efficiently and professionally.
- Event coordinator was easily accessible for their questions/changes.
- Event wrap-up was completed in a timely and organized manner.

For more information on sponsor evaluation, see Chapter 12.

For every promise given,
make sure there is a
system to deliver.

Chapter 6 - Pricing Sponsorships

General Pricing Theory: Trading Value for Value

As stated in Chapter One, a commercial sponsorship is a monetary and/or in-kind fee paid to the MWR event manager/producer, in return for access to the commercial potential, such as public recognition or advertising promotions associated with the event. In Coast Guard commercial sponsorship, you are exchanging the value in your events and opportunities for the value you need, such as cash, products, or other resources. The key here is to understand all the opportunities and to assign value to the tangible assets. Then, after considering the big picture of the event and its impact, group the intangible assets to form your overall packages.

Pricing: There Are No Absolute Rules

Pricing is probably the most challenging part of the sponsorship profession because there are no specific rules. Although you can set guidelines and examples of systems to track your elements, the final package price depends on the overall ability your event has to meet your sponsor's goals and how much they are willing to invest in you to achieve those goals. Some of the specific localized factors that affect pricing include:

- Overall economy in your area.
- Reputation and track record of the commercial sponsorship professionals doing the deals.
- Reputation of the installation in the local community.
- Track record of involvement of other sponsors.
- Timing and professionalism of sponsorship solicitation.
- General understanding by sponsors of the opportunities in the military marketplace.
- What the local market sponsor is currently paying for similar events.

The next chapter looks at a chronological system to organize what you are able to give to sponsors. Once the tangible pieces are in order, you can then add the intangible assets as the final pieces to the packages. For a sample *Pricing Worksheet* that will give you a format for recording your assets, see Appendix M.

Begin with Overall Considerations

Start your pricing system by recording the basic event information and a few key overall factors that affect your value. Begin by recording the following:

- Event/promotion name, date(s), location
 - Stand-alone event
 - Inside larger event
- Year event founded
- POC name, phone, fax
- Expected attendance: Percentage men; Percentage women; ages; rank

Valuing Your Tangible Assets

Each feature of your event has value, and your task is to determine just how valuable each of them is. This section contains suggestions and you will need to develop your own pricing according to what is happening in your own marketplace. And you need to research what the market will bear and is supporting for similar-sized events and activities. There are basically two ways to price tangible elements:

- Face value.
- Gross impressions.

Face Value

Face value is the price a sponsor would pay if they could purchase the item directly. Examples of face value pricing would include:

- Tickets are worth the retail price.
- Program ad is the ad rate price.
- TV/radio is the retail price to purchase the time/space.
- Parking is the price to park.

Although the face value of hospitality would be the catering cost, ticket cost, and a percentage of the overhead (tent, rest rooms, giveaways), the value has intangible elements because there would not be opportunity to purchase access to the VIP area.

Gross Impressions

Gross impressions began in the advertising world where it was fairly easy to measure impressions by viewers or readership. Gross impression pricing is based on the number of impressions that an onsite feature offers per attendee. An impression is when a person is reached by the message a sponsor is delivering, such as seeing a logo, hearing a brand name or receiving a sample. The value is affected by the impact of the element and the duration of the exposure.

Determining Estimated Values Per Impression

The values of each event feature are measured per impression. The range of pricing usually ranges from the low end of one-twenty-fifth a percent (.0025) to the higher 15 percent (.15). For example:

- .0025 might be small logos on tickets, limited PA announcements, and printed names without logos on signage.
- .01 might be banners and average-sized signs placed on-site; small program ads.
- .05 might be substantial stage signage or signage placed in the point-of-view of all attendees.
- .10 - .15 may have an impact on on-site opportunities such as sampling where signage is joined by product showcase and tasting, test-driving, and/or sales.

Once the basic information is recorded, work through recording the tangible features of your event. On the *Pricing Worksheet*, record the feature, the estimated quantity, the estimated value per impression, number of impressions, and then calculate the total value for the sponsor. Again, pricing is not a science, and tips must be taken in the context mentioned at the beginning of this chapter. In the rest of this chapter, you will learn some helpful tips you can use to help you fine-tune your own pricing system, by giving you some possible ways to consider your pricing that is accepted in the industry.

Pre-event

Brand or Product Exclusivity

- **Measurement.** Intangible.
- **Comments.** Exclusivity has value because it closely aligns the sponsor to the event. If the sponsor has a consumer product sold at the event, exclusivity may mean big sales or sampling. Exclusivity can be more valuable by adding coupons and database development via a sweepstakes. The value of exclusivity is higher with the most competitive companies (i.e.: phone service, soda and beer).

Positive Publicity

- **Measurement.** Column inches; number of mentions; positioning in the publication.
- **Comments.** Publicity can be measured by column inches in a way similar to newspaper advertising. Check the publication's rates to find out their value and circulation. You can also measure gross impressions by multiplying mentions by readership. Mention in the context of a story has a low value of .0025, but the name in a positive cover story headline would be more valuable.

Point-of-sale Merchandising and Promotions

- **Measurement.** Gross impressions.
- **Comments.** Multiply the distribution of the POS materials by the traffic at each of the locations. Factor in the number of weeks displayed. Again, high traffic is high value, and larger logo prominence on the piece is more value to the sponsor. Remember that similar level sponsors must have similar-sized logos.

Advertising

- **Measurement.** Depends on the medium.
- **Print.** Column inches/ gross impressions.
- **TV.** Reach and frequency/gross impressions.
- **Radio.** Reach and frequency/gross impressions.
- **Billboards.** Gross impressions (traffic).
- **Comments.** Begin with the retail cost to buy the advertising. The advertising seller has already determined the value by figuring the reach and frequency. You might translate the value into gross impressions for the sponsor. Again, the value per impression is usually an industry standard in traditional advertising, so it is easier to track.

Exposure at MWR Venues and Activities

- **Measurement.** Gross impressions.
- **Comments.** Look at the impact of the activity and the exposure of the sponsor to gauge an impression value. Then look at attendance and traffic to find gross impressions.

Signage: Billboards, Electronic, Specialty

- **Measurement.** Gross impressions.
- **Comments.** Look at the size, positioning, and frequency to gauge the impact of the piece, then multiply the value times the traffic or attendance for the value.

Logo Recognition on Collateral Materials

- **Measurement.** Number of gross impressions.
- **Comments.** Here you track not only the number printed and distributed, but the number of people that see each piece. For example, posters placed for a duration of weeks on a busy city street will have hundreds of impressions, whereas a poster in the

internal bulletin board of the activity center on post will have very limited viewing by the center's users.

At-the-event

Event Program Advertising

- **Measurement.** Column inch ad rates.
- **Comments.** This value will be set by you early in the planning process as you look at the event program as a revenue source. Rates are set by page size, placement, use of color or bleeds, and distribution.

Coupons

- **Measurement.** Gross impressions; possibly face value.
- **Comments.** You can estimate the gross impressions when you look at distribution. There might be an argument for face value pricing if there is a fee established for a sponsor to buy the opportunity to sell a sample. An aspect of coupons is also intangible because you as the event producer do not have control over the buying habits of the attendees and the guaranteed use of the coupons.

On-site Visibility (i.e.. Staff t-shirts, logo trucks, inflatables).

- **Measurement.** Gross impressions.
- **Comments.** This again is creative and based on how much impact you can generate. Impact comes from size, positioning, use of color, use of loud sound, smell, and other elements that touch the senses. Impressions depend on attendance.

Sampling and Selling

- **Measurement.** Gross impressions; face value.
- **Comments.** Coupons, sampling and selling can first cause general impressions. These impressions are much more valuable because they are more sensory and involve the attendees in the product, thus making a more lasting impression, beginning a relationship, and/or affecting a buying decision. Face value only applies if a sponsor could purchase the rights separately to sample or sell.

Consumer Research

- **Measurement.** Gross impressions; face value.
- **Comments.** Research again creates impressions, but limited research has a very limited impact. This of course would be wildly different if every attendee participated in research or was led through some interaction with a product with a feedback-gathering component.

Public Address Announcements

- **Measurement.** Gross impressions.
- **Comments.** Public address announcements are rarely the focus of attention at events. Recorded advertisements with music and excitement cut the clutter much better and have a bigger impact.

VIP Hospitality and Associated Perks

- **Measurement.** Face value; intangible.
- **Comments.** The face value is the ticket, catering, giveaways, and percentage of the overhead. The intangible part that adds value is that "not just anyone" could purchase such a VIP pass.

Giveaways

- **Measurement.** Gross impressions and/or face value.
- **Comments.** If giveaways are free and promotions for the sponsors, then it is based on the number distributed. You might also look at the value of the item to the attendee to see if the item will be kept or paid attention to. If the giveaway is a valuable or collectable item (autographed CD from performers, or autographed event poster), then the value is “priceless,” which is the face value plus the intangible of the collectible or commemorative status.

After-the-event

Right of First Refusal

- **Measurement.** Intangible.
- **Comments.** The right of refusal value depends not only on how successful the event is, but also how many measurable results are produced for the sponsor and the interest of other sponsors to capture the opportunity.

Special Mementos and Recognition Items

- **Measurement.** Intangible.
- **Comments.** These commemorative and one-of-a-kind collectable items are not included in the pricing scenario. These are items that you underwrite as part of the sponsor/relationship building program. They are, of course, meant to be treasured and “priceless” due to the positive memories of success and fun.

Coast Guard Publications Publicity

- **Measurement.** Column inches; gross impressions.
- **Comments.** Again, like general publicity you can refer to the advertising rates in Coast Guard publications as a place to start. Look at impact (a headline verses a mention), circulation, and pass-along readership for impressions.

Positive Word-of-mouth Advertising

- **Measurement.** Intangible.
- **Comments.** It is impossible to measure the value of positive word-of-mouth advertising. You might be able to capture some of the comments in exit interviews or post-event market research.

Packaging Intangible Benefits

Intangible benefits are elements that do not have traditional measurement tools. This is an area where you package all the extras and give the entire group one overall value. Truly the sponsor has to want, need, or at least appreciate the elements for the intangibles to have value. And the factors of track record, overall event success, economy, weather, and so on, all play into this equation. Your best option is to put the intangible into one lump and assign an arbitrary value that you feel you can defend and sell with confidence.

Other Helpful Pricing Tips

Here are some other helpful pricing tips:

- Build the packages in the loose “opportunity” format with a value that is at least two

times the cash you are interested in. Sponsors can easily buy at face value or better, so they need a sponsorship to maximize their resources for exceptional results.

- Develop a menu of additional elements that can be purchased individually to be added to a base package. Examples of add-ons would be tickets, parking, and extra hospitality passes.

- Never over-promise...Always over-deliver! Do not fudge on the attendance estimates or circulation numbers. Over-promising kills sponsor relationships!

- Be sure that the total of all of your event packages exceed the overall goal for the sponsorship sales campaign. It is likely that you will need room to deal and discount to get sponsors to try your events, and you need the room to be flexible in the selling.

Chapter 7 - Successful Proposals

Strategic Proposals: Selling the Opportunities and Possibilities

This chapter explores some formats of sponsorship proposals. As discussed in previous chapters, your goal is to showcase the unique opportunities associated with Coast Guard commercial sponsorships and your willingness to customize the opportunities to meet sponsor goals.

Beginning with the Basics

The basic components of a sponsorship proposal include:

- Cover letter of introduction.
- Fact sheet about the installation and sponsorship in general.
- Specific event opportunity overview.
- Additional installation and/or event marketing materials.

All these materials need to be kept together in some sort of binder, folder, or envelope.

Cover Letters with Style

The cover letter is similar to the first impression in a meeting. This letter makes the initial impact and sets the tone for the enclosed materials. Cover letters come in all shapes and sizes, and should visually complement the entire solicitation package.

Customize opportunities
to meet sponsor goals.

Great cover letters also include these major elements:

- Invitation to discover the opportunities.
- Brief overview of the program.
- Reference to specific enclosures.
- Request for action and follow-up plan.
- And don't ever forget...

Invitation to Discover the Opportunities

The cover letter is the invitation to discover the unique opportunities in MWR sponsorships. As an invitation, the language should be "inviting" with action verbs and an excited tone. The letter should always be personalized to the appropriate contact that at least begins the decision-making process for your level of request. Remember to mention your ability to customize the packages. Unless you know the contact, use their surname in the salutation.

Brief Overview of the Program

After the initial invitation to review the opportunity, the cover letter should give a brief overview of the event, its scope, and impact. Think of this section as almost the overview from the planning worksheets using enough facts to paint the picture in a clear and concise way.

Reference to Specific Enclosures

After the overview, make the review process simple by referencing the enclosures in the sponsorship packet. This is a chance to be sure there is no confusion on the part of the potential sponsor and to quickly lead them to the most important materials. When preparing your packages, keep in mind that in sponsorship solicitation, more is not better! Many sponsors do not have the personnel or staff time to read through lots of paperwork. It is best to try the “opportunity overview” style to catch their initial attention, then to offer more extensive information if they are interested. Remember, you need to stress the benefits to the potential sponsor with a “soft sell” style. Don’t forget to mention the ability to customize the packages.

Request for Action and Follow-up Plan

Finally, in order to finish the cover letter, ask for a specific action from the potential sponsor. This action is likely to be in the form of “Please review the enclosed information” and/or “Please consider how sponsoring x can work for *company name*.” Do not assume that the prospect will automatically review the materials. ASK! Then address the specific plan for follow-up by you or your staff.

For example:

- “Please review this exciting opportunity to bring the July 4th celebration to the Coast Guard Academy. I will call you next week to answer any of your questions and set a time to explore the possibilities.” In this follow-up step, include a thank-you to the prospect in advance for their consideration. For a sample *Cover Letter*, see Appendix N.

And Don’t Ever Forget...

Here are a few things that you should never forget when compiling your cover letter:

- Introduce yourself and mention any referrals.
- Make the opening sentence an attention-getter.
- Never have any misspelled words! This is your first impression.
- Always check for the correct contact name and title; again, watch the name spelling.
- Use the formal sir names of Mr., Mrs., or Ms. unless you have a close relationship with the sponsorship contact. Remember to always be very professional, because sponsorship packets are likely passed to many people for review.
- If there is any chance this may not be the contact, ask for a referral to the proper person.
- Be sure you have a document in a type style and size that is easy to read; paragraphs should be short and to the point.
- Be sure that the enclosed documents you reference really are enclosed; double-check to be sure everything matches.

Choose an easy-to-read font style and size for the cover letter.

Fact Sheets Highlight Overall Details

In the sponsorship solicitation process, you must assume that the prospects know nothing about your installation or Coast Guard commercial sponsorships. Even if your initial contact has worked with you before, the package may be passed on to others that do not share the same understanding.

To educate potential sponsors, create and use an overall installation fact sheet. This could be an Announcement of Sponsorship Opportunities, as mentioned in Chapter 3. The announcement should include the following:

- Name of installation.
- Location, city, and state.
- Profile the focus of the installation, including the primary mission, key details about your history, members of the command, and their demographics (population, sex, ages).
- General photos, maps, or logos that represent the installation.
- Size of exchange (if applicable).
- Name or at least staff position, address, phone, fax, e-mail of the sponsorship point-of-contact (POC).
- Possible overall schedule for the year (this dates the piece and makes it tough if you make changes).
- Highlights or pictures of your annual event(s).
- Possible comments from other past satisfied sponsors (be sure to get their permission first); use quotes or examples of results via your sponsorship programs.

The purpose of this fact sheet is to give an executive summary of the installation and its commercial sponsorship program. Make sure that the information that you plan on using is properly cleared through your command.

The Event Sell: Opportunity Overviews

The Announcement of Sponsorship Opportunities is the actual sponsorship “sell.” Think of it as the executive summary of the menu of possibilities that a sponsor can work with you to customize into their final package.

The Strategy Behind the Format

The key in this piece is to make it simple for a sponsor to quickly read the summary and determine the potential benefits to their organization. This simple format is based on the fact that in the highly competitive sponsorship world, contacts do not have the time or staff to review lengthy proposals. The opportunity overview format respects the potential sponsor’s valuable time and delivers the maximum impact for the event package.

Key Components

The key components of the opportunity overview include:

- Name of program/event, date(s), place, event logo.
- Level of proposed sponsorship.
- General event history/overview.
- Listing of possible elements at the suggested level.
- Investment for the sponsorship level.
- Commercial sponsorship POC with address, phone, fax, and email.

It is great if this opportunity overview can fit in one easy-to-read page. The goal is to stress the potential array of benefits and communicate the interest in customizing the package. For a sample *Opportunity Overview*, see Appendix O.

Creative Sponsorship Proposal Packaging

Once you have all the elements, it is time to put the creative package together to catch the sponsor's attention. The goal here is to showcase your professionalism and the quality not only of the event but the entire professional commercial sponsorship effort. Packages can be loose elements in a folder or envelope or bound documents under a cover. The size and scope of the proposals will dictate the format that is easiest to read and understand.

Remember in the initial solicitation, more is not better! Do not scare potential sponsors with too much "stuff." Stick to the possibilities and stress benefits • benefits • benefits!

In the initial solicitation,
more is not better!

Creative sponsorship proposals can contain the following elements:

- Covers, photographs, and graphics
- Previous publicity and past sponsor feedback
- Sample past event collateral materials
- Mailers with style

Covers, Photographs, and Graphics

If you choose to bind the proposal, then start with a cover. Include a logo or color photograph to illustrate the event. Stay consistent from the cover through the response form in typeface and styles of graphics. Remember, this is the first impression! Also remember that sponsors are looking at each piece to evaluate if they can tie their company name and product/service to you. In the presentation of your event, every detail counts.

If you choose, you could include color photographs in the proposal.

When using photos, here are some tips:

- Be sure the photograph quality is excellent.
- Really look at the photos to notice if all of the elements are what you want the sponsor to see; note the cleanliness, look of the site, audience size, other sponsor participation, and so on.
- Consider top-quality color Xeroxes of photos to avoid mounting actual photos to the proposal.
- If you use photos, be sure they are copies; proposals rarely get returned!

Previous Publicity and Sponsor Feedback Quotes

Let others tell your story! If you have wonderful publicity or past sponsor quotes about their success with Coast Guard commercial sponsorship, you might want to include this in your package. Remember, choose one or two of the best examples and put them on the back of the proposal. Work the sponsor quotes in graphically on the cover or overview pages. Offer sponsor references, but get permission first.

No photo is
better than
using a
distorted one.

Sample Collateral Materials

You might feel like you want to show the potential sponsor everything from the past event. Although later at a face-to-face meeting the “show and tell” materials may fit very well, they might be too overpowering for an initial proposal. Hold back multiple examples or video tapes, large programs and posters until you detect some actual interest. You can offer these specific examples on your response form and then quickly deliver them. This also saves the loss of the precious documentation materials to uninterested prospects.

Mailers with Style

What catches your attention when it crosses your desk? Imagine a stack of ten sponsorship proposals on a corporate desk. Which ones will get opened? And which ones will be moved to the top of the pack?

Once, the whole package is together, choose a mailer that catches a sponsors attention and compliments the overall pitch. Try some of these tips:

- Can the package fit in an unusual envelope? Could it be a color? Could there be a large graphic, inviting “teaser” or even color photo?
- Can the envelope have an overall texture? Could it be foil or clear plastic or another unusual material?
- Is there something creative that fits with the installation and package that adds a “3-D” element to the package?
- Could the package be in a box or tube?
- Could a hand delivery make an impression? If you can schedule an interaction with the key contact consider a costumed delivery person Again, never compromise professionalism to get noticed, but do think about all aspects of your impression, from the first look at the packaging to the response form.

Chapter 8 - Targeting Sponsors

The Great Search for Sponsors

Once the sponsorship packages are ready to go, it is time to match them to the most likely sponsor prospects. Although this sounds like an easy process, your success is directly related to the groundwork and efforts that have come before it. As discussed throughout this publication, sponsorship targeting and sales begin with ongoing sponsorship relationship building.

Commercial Sponsor Prospects: Where to Begin

The place to begin looking for potential prospects is by asking the following questions:

- Who do you have current relationships with? Who has sponsored something at this installation before?
- Who has targeted the Coast Guard for business? What specific products and services do they sell to you?
- Are there any national contracts that affect this sponsor?
- What leads do you have from CGES or the other people on the installation? Has anyone ever approached you to discuss possible opportunities?
- Does the advertising POC have advertisers who want more than they are getting and could be approached to add events to their strategy?
- What are the most used products and services on the installation? What is hot and could want more exposure? What is brand new or upcoming?
- Who is geographically located near you who has a presence in the civilian community? Who sponsors events outside of the installation?

The first and easiest place to start is to call on sponsors who are already involved and successful in the Coast Guard market. If you do not know the contact, try to get a personal introduction to them.

Sponsorship starts with relationship building.

Research to Find Sponsor Contacts

The next place to go to find sponsors is to do your homework. Once you have looked around to see what products or services fit the events goals and offer value to the sponsor, it is time to uncover the key contacts.

Research can take many forms, from reading local and post newspapers, to cutting out ads of events and promotions, to going to the library to find out more background about the companies you want to meet. Some places to look for contact names were discussed under “Creating Something New: Where to Find Ideas” in Chapter 3. Here again are some sources:

- Post papers
- American Logistics Association Member Directory
- MWR Today
- Parks and Recreation

- Military Club & Hospitality
- Government Recreation & Fitness Magazine
- Government Food Service
- Executive Briefing
- Local phone books or lists of businesses
- Chamber of Commerce Directories

Matching the Correct Contact to Your Event or Program

Remember, you want to find the contact who has responsibility for your level of involvement and your geographic area. This means that the “Gatorade” contact listed in a national directory is not likely to be the one assigned to military marketing. This also means that although there may not be a military marketing division in a smaller company, there is probably a geographic representative for your area. Going after the wrong contact is a huge waste of time for you and them, so make some calls to the offices to fine-tune your contact.

Remember, depending on the size and type of your request, you may fall into special circumstances for sponsors. Very small requests do not make sense to a national office who only deals with the BIG DEALS that have a national scope. It is safest to begin with the local contacts in the nearest civilian community and to build your relationships there first. Once you have made a local contact, they can take you higher into the organization if your request warrants a different path.

Be friendly and ask for help from the clerical staff and lower-level assistants on how to contact your potential sponsor. Never demand a meeting or be too pushy. Just ask for the correct path to send a professional presentation and call to request 15 minutes to discuss the possibilities and how the Coast Guard market can meet their goals.

Case Study #2

Matching the Sponsor Need with a Specific Event Need

The Water Patrol...Quenching the Sponsor's Thirst

Wiersma Event Marketing, Indianapolis, IN

In 1992, Kroger, a national supermarket chain, introduced their own line of bottled water. This mountain spring refreshment was going on the shelf as the new summer product available with the Kroger label. The challenge...how to get the word out to the general public? The solution...the Water Patrol of the Indianapolis Gus Macker 3-On-3 Basketball Tournament!

When 7,000 athletes gather for a weekend of hoops, there is a big demand for water. The Water Patrol was created to quench the player's and sponsor's thirst. The on-site logistics included:

- Ten 10 x 10 tents set-up on-site with jugs of Kroger water and stocked with Kroger cups for players.
- A Kroger water truck was parked on-site. This truck had water spickets on all sides so players could pour Kroger water into their water bottles and coolers, and Water Patrol volunteers

could fill the water jugs for the tents.

- The Kroger logo was placed on the player t-shirts, the volunteer t-shirts, the *Gusette* newspaper, and PA announcements were made during the tournament. By creating the Water Patrol, the event benefited by having quality water to provide for the players and the sponsor benefited by having their logo associated with their new product. In this case, matching the sponsor to the event was successful and proved to be a “win-win” situation for all parties involved.

Sponsorship success is often found right outside the installation gate.

Networking to Expand Your Sponsor Base

Many sponsor contacts can be found by attending marketing meetings, conventions, and other business networking functions. At such meetings, you have an opportunity to meet all types of people who might someday be a sponsor or connect you to a sponsor. Some tips on the art of networking include:

- Carry plenty of business cards, but don't carry your proposals or brochures; you can send them later if needed.
- Look at people and extend your hand to shake. Introduce yourself as “name” from “installation”. At first don't worry about your titles or what you do. Give a smile and really listen to their name and organization.
- Ask them questions so that the new contact talks about themselves. Listen to their conversation and acknowledge that you are interested in them. Ask what types of things they do or where they grew up. Look for topics or people that you have in common.
- At the end of the conversation, exchange business cards and offer to be their POC at the installation if they ever need anything. While the conversation is fresh in your mind, write “cheat notes” on the back of the business card. Write down things or people you have in common or anything from the contacts comments you might want to remember. Be sure to date the card and write down the place you met.

After you return to the office, write a personal note to the contact and express that you enjoyed meeting them. Remind them they have a new “friend” at the installation and possibly offer a free tour or tickets to your next event. Remember, your goal is to build relationships so you can understand the types of things sponsors need and how your events can work for them.

Developing Sponsor Master Files

As you collect names and contacts from networking, it is critical to organize an overall sponsor master file. This file can be in two forms:

- A database program for managing a mailing list and contacts.
- A hard file for samples of other sponsorships the resource has participated in and other company information such as annual reports, logos, and business cards.

The Database

A sponsor database can be used as a mailing list for quarterly updates or a tracking system for all contacts. Depending on the type of computers and the software you choose, you can design a database to be sorted by “fields” such as contact name, sponsor name, type of company, previous Coast Guard sponsorship history, date of initial contact, and so on.

The Hard File

A sponsor hard file is the place to keep the paper associated with the sponsor. This is the place to keep the clippings from military and civilian magazines, the company annual report, up-to-date logos, and the agreements for each deal you do. As your professional programs grow, these hard files give you a place to see what has worked in previous deals and what the sponsor has chosen before to prioritize or value.

It is beneficial to keep personal files on your sponsor contacts. Information such as birthdays, names of spouses and children, and hobbies can come in very handy and shows the sponsor you have an interest in them. It is also important to have the right type of storage for the paper files. Many times artwork is oversized and needs storage in a large flat file. Large items can also be captured on photographs and slides to save space and keep the quality.

Tailoring Your Sponsorship Proposals

Effective targeting of sponsors requires an understanding of the potential sponsor’s needs and the ability to show how your property fulfills these needs.

Retailers

Retailers want to sell products through your properties. Retail deals must be done in cooperation with the exchange. Your retailers are the keys to what package good sponsors really want...shelf space, in-store displays, and co-op advertising. Retailers like events that build store promotions and traffic. They like to sell products as much as the package goods companies do. Build good working relationships with your CGES retail professionals to maximize your cooperation. Stress that sponsorship is win-win for everyone - especially active duty and their families.

Packaged Goods

This category covers the hundreds of products sold on base through the exchange including food, beverages, household supplies, and over-the-counter pharmaceuticals. Shelf space is a key issue for package goods marketers, and the competition is intense for your retailer’s attention. Generate value in your sponsorship proposals with the elements of shelf space and displays. Special enter-to-win contests at such displays can add more value and drive consumers specifically to the product area.

Auto Makers and Dealers

Marketers for high ticket items like cars and trucks want consumer trials connected to sales. Because these products are not likely sold on-base, the association for sales must be at the event or connected to the local civilian market retail location. On-base test drives and static displays are permitted with the commanding officer’s approval.

Service Companies

Service companies use sponsorships to differentiate themselves from their competition.

So many services sound the same in advertising that it is the possible trial-by-fire at an event or the promotional offer that moves a consumer to purchase. Although your telecommunications contracts limit your sponsor sources, you can look for other services for the installation population. Event sponsorships position the sponsoring companies to do business with your specific population. Financial planning and insurance companies are now specifically targeting the military population. Care must be taken to enter into agreements only with reputable companies and only with the proper approval.

Business-to-business Marketers

Businesses look for places to take their other business clients and potential clients for VIP hospitality and special treatment. Sponsors can use installation entertainment events for this tactic to develop business contacts outside of the Coast Guard. Be aware that business-to-business sponsors are looking for packages of tickets and VIP treatment to be distributed to their sales team or new business development people. Look for ways to involve the sponsors and their guests with the actual athletes or performers and arrange for one-of-a-kind mementos or photos.

Local Hometown Companies

When you approach a company in the local community, incorporate two benefits into your packages:

- Sponsorship demonstrates to the whole community their support of the installation and its population.
- Employees of the local company can get special ticket deals or can volunteer to get involved in the fun parts of the event. These are local quality-of-life issues that are important to local sponsors.

Media

The media has value that works as well as cash and that is promotional consideration for the event and other sponsors. The big issue for today's media is giving "added value" to their advertisers. Added value can be defined as the ability to participate in events and promotions for items such as sampling, sales, and trial. When you give media sponsors rights to on-site sales, sampling and trial, define the rules for how they can pass this value on to their advertisers. Work with your media sponsors as partners and see if they can sell some of your packages to their advertisers.

On-going Relationship Building

As this chapter has highlighted, the key to targeting sponsors is to do your homework to understand as much as you can about who they are and what they want. As you meet key people, put forth the extra effort to make friends and business associates. Look for opportunities to host contacts for installation tours and events. Invite sponsor contacts to be VIPs at events so they get a taste of what you can do. Always take time for a phone call or to write a note to recognize good news you hear about a contact. Build relationships every day; they are the key to the success of your commercial sponsorship program.

Make time to phone or write to acknowledge good news you hear about a contact.

Chapter 9 - Making the Sale

The Professional Process of Selling

The purpose of this chapter is to outline a professional process for selling sponsorships. The key words here are “professional” and “process,” meaning that your goal is to set up systems to use each and every time you sell. These systems then are refined to fit the needs of the program. This chapter approaches the process in a chronological order including:

- Setting Up the Meeting.
- Pre-sale Preparation: Getting Ready.
- At-the-meeting Tips.
- After-the-meeting: The Next Steps.

Setting Up the Meeting

The process begins with the follow-up to the initial sponsorship package. Although in the best case you will receive a response telling you of a potential sponsor’s interest, the reality is that you will probably need to call to follow up the packet mailing. The follow-up conversation usually covers the following topics:

- Hello, and is this a good time to discuss Coast Guard commercial sponsorship?
- Did you receive the package; have you had time to review the opportunities?
- Can we set up a convenient time to look at the opportunities and see how they can be customized to meet your goals?
- Who from your organization needs to attend the meeting?
- Would you like us to come to your office, or would you like to see the installation and event site?
- Repeat the date, time, place and the people that will attend; suggest the meeting length (one hour to begin) and confirm if this will be a meal (if appropriate).
- Thank the person for their time, and comment that you look forward to the meeting.

The place to begin is to first ask if this is a good time to discuss Coast Guard commercial sponsorship opportunities. If not, ask when you can return the call. It is probably best to return a follow-up call and try to find the contact rather than to leave a message and expect a return call. You want to begin the relationships on the right foot, with you taking the lead.

Who Should Attend

In the best-case scenario, you want the actual decision-maker to attend the sponsorship review meeting. You want the decision-maker present so you cut the time of actually customizing the package and getting the commitment. It is sometimes tough to meet with the real decision-maker in the organization, and many first meetings involve the “gate keepers” who protect the contacts. Be sure in the meeting discussions you at least uncover the approval process and the exact person(s) who will make the decision. Match your staff to the contact’s staff. Do not overpower the contact by bringing too many people. Although it is important to introduce the installation team and the actual project manager, the first meeting needs to be limited to the people who need to discuss the elements of the deal. Later you can transfer the relationship to the day-to-day manager.

The Meeting Purpose

Although you mention the purpose in the telephone conversation, it is important to have an intentional purpose for the meeting and to clearly communicate that purpose to the contact. The purpose can be specifically mentioned in the confirmation letter. A sample purpose for a follow-up sponsorship sales call is:

Purpose: To meet with (contact) to understand their level of general interest in the proposed Coast Guard commercial sponsorship opportunity and the specific elements they would need in the package to meet their goals and commit their resources.

Timing

Remember, you are taking up the time of a contact in hopes they will “buy” your project. Although you will customize the plan to meet their goals, this is still *your* meeting about *your* idea.

Uncover the approval process.

In general, offer to keep the initial meeting to one hour or less. Mention that you will have an agenda and are really interested in them having the opportunity to ask specific questions. Also work around the sponsor’s calendar. Remember, sponsors plan six months to two years ahead of the events. If you have a request outside of their budget cycle, you are at their mercy for finding funding. Because you are building long-term relationships you want to start on the right foot.

Audio Visual Support or Other Special Needs

Be sure you have the audio visual support you need to show a video or slides at the meeting. If you are going to their office, find out if you need to bring equipment. Do not assume that the contact has had a chance to look at the video, even if you sent it ahead of time. If it is a slide projector that you need, check the style of tray and availability of remote. Do a trial run with equipment. In general, assume nothing!

Written Confirmation

Confirm the meeting with a letter stating the date, time, place, and purpose. Mention who will attend from each party and the length of the meeting. Include an agenda or at least refer to the preparation of an agenda to maximize everyone’s time. Confirm audio visual support you have arranged to use or that you will bring. Offer a POC if there is a problem and the meeting has to be rescheduled. And again, thank them in advance for the opportunity to discuss the “exciting possibilities.”

Pre-sale Preparation: Getting Ready

Before you go to the meeting, it is important to do your homework and be prepared. Use the following tips to get ready:

Reviewing Your Sponsor Files

Remember to keep hard files on sponsor prospects, including the companies’ annual reports, ads from events they sponsor, product ads, stories from trade publications, and so on. Now is the time to pull out that file to get up to speed on the sponsor company. Familiarize yourself with their latest products and services. Look at the logo colors and style, and think about how it fits with your event look and feel. See if the sponsor has

done other sponsorship with

Remember, sponsors often plan up to two years out.

the Coast Guard or other military markets. Review any projects you have done with the sponsor and the high points of that success. Share this information with everyone from the installation attending the meeting, so everyone will be prepared.

Researching Connections

Call around to get background information on the actual sponsor contact person. Does any of your contacts know them and can they help you understand the sponsor's style? What is the sponsor's job history? Have they had any association with the military in any way? Is anyone in their family in one of the Services? These are all helpful details when putting together the best approach to reach your goal of selling sponsorships.

Preparing Reference Materials and Samples

Remember that you shouldn't place too much "stuff" in the initial proposal package. It is now time to bring some "show and tell." Visuals such as collateral materials, posters, programs, ads, radio, and TV spots help to illustrate the package. Decide if these are samples you can leave for the sponsor or samples you need to keep. Again, do not bring too much. The purpose of the meeting is to look ahead to new possibilities, not to repeat everything from the past. Consider the professionalism of the materials, and ask if the level of the sample is the best it can be. Do not show inferior work and promise it will be better with their resources! Potential sponsors could be frightened by the event's past history and not want to risk a promised image change with their resources.

Setting an Agenda and Time Limit

Create a meeting agenda to fit the time commitment you made to the sponsor when setting up the meeting. Usually one hour is the desired length of time. If the sponsor has more questions, plan to be flexible to accommodate their interest. This shows your flexibility and high customer service to meet their needs right from the start.

Rehearsing the "Ask"

Before you go into the meeting, rehearse asking for the sale. Think about the realities of what you need and what you can give. Be sure you know the national contracts that are in place and be prepared to give all the answers you can about the event. Discuss with your team attending the meeting exactly who will ask for the sale or ask what it would take to make the sale. Don't forget to put on the agenda a discussion of sponsorship commitment.

Share information with everyone from the installation attending the meeting.

Confirming the details

You may choose to make one final call right before the meeting to reconfirm the time, place, and attendees. This is a good time to see if the audio visual equipment is in place and to see if there is anything else you need to bring. Again, you need to be the

professional by double checking every detail to show your aptitude for exceptional event and project management.

At-the-meeting tips

Here are a few tips to consider when you are at the sponsorship sales meeting.

Always Be On Time...or Early

The number one rule for making that positive first impression is to always be early or on time. Never be late. If for some reason outside of your control you are late, make a call to tell the sponsor contact and apologize for the inconvenience. Ask if the meeting needs to be rescheduled. Be most sensitive to the sponsor's schedule.

Attitude • Attitude • Attitude

Your overall attitude is another factor in sponsorship sales success. The goal is to show your flexibility and professionalism. It is important to be energetic. Think about the types of people that make you feel most relaxed and comfortable, and notice that a person's attitude is more than half the battle. Don't mention *any* negatives especially shortcomings of staff not present. Coach other staff on this also.

Dress for Success

Dress for success by matching the style of your prospect. This might take some investigation if you have never met the person. Generally, you can get a feeling for the formality of the office setting and the organization. Sometimes you will find the environment to be very informal, especially in sporting goods companies. If you are having trouble in this area, try to call the assistant to the sponsor contact and see if that person can help you. Again, the goal is to match the prospect to build a level of comfort.

Friendly Openers

It is important to build rapport with the contacts before jumping right into business. This is a time to try to get them talking about something you might have in common or something they care about. One place to look for conversation starters is on the walls of the office. You might see degrees, photos of family members, and/or "trophies" from other events or activities. Walls that are filled with "stuff" show a personality that likes recognition and values the keepsakes. A very formal empty office sometimes reflects a more conservative personality. Begin with a friendly comment and a more personal question. For example:

On the wall: Photo with celebrity golfers and commemorative flag.

Comment: "Wow, what was it like to play with a pro like (celebrity)? Is he really as good in his short game as they say?" Hopefully this leads the contact to tell the story behind the wall display and gives you a chance to listen intently. You then could comment on your golf game and the challenges of the pursuit of that little white ball. You might continue to include other sponsor representatives by asking if they participate in the game and about their favorite courses, clubs, and so on. Again, the goal is to develop a comfort level and begin with shared interests.

Presenting the Agenda

Once it is time to get down to work, begin by presenting the agenda and confirming the timetable for the meeting. Ask if anyone has any additions to the agenda or conflicts with the meeting end time. This will confirm up front the time the prospect has allotted

for your presentation and their commitment to stay through the meeting. Give everyone a hard copy of the agenda. It could be on installation or event letterhead. Have extra proposals and collateral material available for the sponsors. Your staff should have their own copies along with their own notes for the discussion.

Ask questions, most people like to talk about themselves.

Reviewing the Materials

Next, simply review the sponsorship opportunity overview, touching on the overall vision and the concept that each package is customized to meet the sponsor's specific goals. It is in this material review segment that you want to try to uncover the sponsors' goals, and discuss the tactics they see in your proposal that might fit their needs. Ask them, "What are some of your specific goals?" and see what they say. Then, in a soft sell and information sharing tone, you can brainstorm how those goals might fit in your event. Let them present the ideas whenever possible. The goal again is to get them talking and sharing.

In this process, show the "stuff" that matches the tactics. The touch, the feel, and the sound of the collaterals will add to the excitement of the proposal.

Ask for Questions/Concerns

After reviewing the materials and showing the collaterals, stop and ask, "What are your questions?" Asking this leads to a comment, while asking "Do you have any questions?" can lead to a "no" answer. If you need to prod the contact, ask "What do you think of x?" This question again gets the sponsor talking and reacting to your presentation. Another technique is to repeat the sponsors' comments to be sure you understand and put the focus on their ideas. People like to be recognized for their input and like to hear themselves talk.

Take Copious Notes

Be sure someone from the installation is tasked with taking copious notes during the entire presentation. This note-taking shows that you are really interested in their feedback and gives you a place to look back to when you are doing the meeting wrap-up. A progress report can be used for note-taking. For a sample *Progress Report*, see Appendix P. You can use this form in conjunction with the action list to record the next steps for everyone involved. For a sample *Action List*, see Appendix K.

Asking "What are your questions?" leads to a comment not a "no" answer.

Ask for Commitment

At the end of the discussion of questions and concerns, it is time to review the opportunity that is on the table and ask for the sale. At this time, review the customized elements of your sponsorship package and how they will meet the sponsor's needs, the level of the package to offer those elements, and the package price. If you know in advance that the decision-maker is not at the meeting or that this meeting is just fact-

finding for the sponsor, then the “commitment step” becomes the “where do we go from here” step. One place to check if a commitment can be made might be when you overview the meeting agenda and touch on that final point. The language might sound like “...and lastly we will review any matches we have uncovered between what we have to offer and what you need. We can then discuss the timing of commitment.”

After-the-meeting: The Next Steps

After the meeting, the professional sales process continues with meeting follow-up. It is important that this follow-up is in a timely and professional manner which reflects the style of your project management. The key component to the follow-up is a letter that outlines the results of the meeting and the next steps as discussed. The letter might include but is not limited to:

- Re-submission of a proposal containing their specific package elements and level of commitment to cover these elements.
- Appeal for questions or problems.
- Confirmation of project POC and question of when to meet again.

Re-submission of the Proposal

Because the opportunity overview was a briefing on the possibilities of sponsoring a Coast Guard MWR event, it is not the final proposal. The opportunity overview allows the sponsor the freedom to interact with you to customize the packages to meet their specific needs.

After the sales meeting, use your extensive notes to create the actual proposal. The proposal should outline the specifics. It should work closely with the Coast Guard approved agreement, as mentioned in Chapter 10. Be sure you are very specific in the proposal, and never over-promise what you cannot deliver.

Questions or Problems

Because in the follow-up letter you are closing the sale, it is important to ask for immediate communications of questions or problems. The follow-up letter will need a follow-up phone call to ensure that the proposal is acceptable and that an agreement can be drawn up. Always offer to answer any questions or problems immediately and ask that sponsors please communicate their concerns ASAP. You need to know if the deal is going wrong so you can correct the problem and/or look elsewhere for sponsorship.

POC Confirmation/Next Meeting

Lastly, in the follow-up letter, reiterate the project POC and suggest it is time to discuss the next meeting. It is important from this point on that sponsors have one contact for all their questions or concerns. It is also important in *negotiations* to have a single source of decisions and maker of promises. The POC should sign the letter and make the phone call to be sure the proposal is accepted.

Make sure the potential sponsor has one POC for all questions and concerns.

Chapter 10 - Evaluation Criteria and Agreements

Solicited Sponsorship

Evaluation Process

Before choosing a sponsor for an event or program, or before deciding whether to accept or decline an unsolicited sponsorship offer, a system must be developed to evaluate the offers. The selection process must be impartial and based on the needs indicated in the solicitation.

Evaluation Criteria

The first step in developing the evaluation system is to determine the criteria that will be used to evaluate the offers. Each event or program will have different evaluation criteria and is based on what is needed for each event or program. The factors that will be considered in evaluating offers should be tailored to each sponsorship initiative. It is best to first list each of the needs of the event or program (cash, t-shirts, sports drink, and so on). After the list is compiled, a weighted value can be assigned to each need. When all the offers are received, they can be evaluated based on the weighted criteria. Evaluation of offers will be based on market value of services, goods, or cash offered. Consideration should also be given to whether it is appropriate to enter into sponsorship agreements with certain firms.

Selection

Selection of sponsors can be limited to one per product category. Most sponsors will only sponsor an event or program if they are the only company in the product category. Remember that product category limitations are valuable to sponsors and thus negotiable. Before final selection is made, check with your servicing legal office to assure the potential sponsor is not a vendor barred from doing business with the Coast Guard. Also advise the CGES manager of the potential sponsorship agreement to ensure that the sponsorship will not violate existing CGES understandings or agreements.

Notification

When a selection is made, the commercial sponsorship manager will give written notice of the selection to the sponsor. When the selected sponsor has been notified, the sponsorship manager will then notify, in writing, those not selected. Upon request, the sponsorship manager may discuss weaknesses in the unsuccessful proposals. However, the proposals will not be compared to the successful proposal, and no unauthorized release of confidential or privileged information may be made during such discussions.

Unsolicited Sponsorship

Evaluation Process

When an unsolicited sponsorship offer is received, it must be evaluated to determine if it is in the best interest of MWR. Factors to consider include: cost to implement the proposed program (if the offer is not to sponsor a currently budgeted MWR event or program), the appropriateness of the potential sponsoring corporation, and the

monetary and retail value of the offer.

Selection

Before a final decision is made, check with your servicing legal office to assure that the potential sponsor is not a vendor barred from doing business with the Coast Guard.

Also advise the CGES manager of the potential sponsorship agreement to ensure that the sponsorship will not violate existing CGES understandings or agreements.

Unsolicited sponsorship offers can be either accepted or declined.

Notification

If an unsolicited offer is accepted, the commercial sponsorship manager will give written notice of the decision to the sponsor. Receipt and acceptance of an unsolicited proposal does not require solicitation of other sources.

Written Agreements

Requirements

The commercial sponsorship agreement is a detailed description of the responsibilities of the sponsor and the MWR activity. Agreements are written for both solicited and unsolicited sponsorship. All sponsorship agreements must have legal review and concurrence. The agreement is not valid until signed and dated by both parties.

Agreements will not exceed a one-year period. Annual renewal options, if any, will not exceed five years. Commercial sponsorship *is not* conducted through verbal agreements. For a sample *Sponsorship Agreement*, see Appendix Q.

Agreement Contents

Each agreement should first state who the agreement is between, the company and MWR. It should then describe the event or program being sponsored. The responsibilities of both parties should then be described in as much detail as possible. This helps to preclude any misunderstandings and false expectations. Any items that must display the disclaimer should be described here along with an example of an approved disclaimer. In addition to outlining the responsibilities of the parties, the agreement must contain the following clauses: term and termination, force majeure, and assignment. It is required that the sponsor certifies, in writing, that no cost of the sponsorship will be charged to the Federal government. This certification can be incorporated in the agreement.

The term and termination clause states the length of time the agreement runs. It also allows both parties the right to terminate the agreement if there is a breach of any of the terms set forth in the agreement.

The Force Majeure clause assures that no party is responsible for events that are unforeseeable and beyond reasonable control such as weather delays or acts of God.

The assignment clause prevents a sponsor from selling or transferring their rights to an event or program to a third party without the written consent of the MWR.

In agreements with alcohol (including beer) companies, it is advisable to include clauses that make clear that the sponsorship is for advertising and promotional rights only.

Agreement Addendum

Sometimes it is necessary to amend a signed agreement due to a change in the event or program or in the scope of the sponsorship. This can be done by drawing up an

agreement addendum. The addendum states the parties to the agreement and the changes required. To be valid, the addendum must be signed by both parties and have legal review. For a sample *Sponsorship Agreement Addendum*, see Appendix R.

Legal Review

All sponsorship agreements and addendums must be reviewed by your servicing legal office. Legal review and concurrence are required by commercial sponsorship policy and guidance.

Multi-year Agreements

Commercial sponsorship agreements are valid for a period of one year or less. This does not preclude granting the sponsor the right of renewal or right of first refusal. Both of these concessions are of potential value to your sponsor. Keep that in mind as you negotiate the sponsorship fees and terms.

The right of renewal allows the sponsor the right to sponsor the event again provided the event is conducted by the MWR. It also defines the terms of the agreement, for example, any increase in sponsorship fee. If a sponsor exercises its right to renew, an agreement clearly defining the rights and responsibilities of the parties should be drafted and signed by both parties. This agreement requires legal review. If a company is given a right of renewal and chooses to exercise this right, and is willing to the terms for renewal detailed in the original agreement, and if the MWR is conducting the event, the renewal must be honored, even if another sponsor in the same category offers more. It is very important that the right of renewal is not given carelessly to every sponsor. The right of first refusal allows the sponsoring company the right to meet any bona-fide offer made by a potential sponsor in their category. If a sponsor exercises their right of first refusal, within the time agreed upon in the original agreement, and if they can meet the potential sponsor's offer, and if the event is being conducted, the right of first refusal must be honored. When inserting the right of first refusal clause in the original agreement, care should be taken when determining the date for the sponsor to notify MWR of its intent to ensure adequate time to allow the solicitation of other sponsors if the current sponsor chooses not to renew.

The original agreement and any annual renewals (right of first refusal or right of renewal) will not exceed a total of five years. This does not preclude the award of a new contract to the same sponsor after the initial five-year period.

Chapter 11 - Record Keeping

Standard Operating Procedures (SOP)

Each commercial sponsorship representative should develop a SOP. The SOP should address the Coast Guard regulations and guidance that govern the Commercial Sponsorship Program but should also be installation specific. The basic premise for the document is to ensure that anyone who is in contact with the sponsorship program is aware of the steps to follow in order to make the program successful. The Commercial Sponsorship SOP lays out the step-by-step procedures the installation commercial sponsorship representative, program manager, and command will follow in the sponsorship arena. Every SOP should address these key elements at a minimum:

- **References.** The Coast Guard policy and guidance that governs the Commercial Sponsorship Program.
- **Introduction.** A brief explanation of sponsorship or the history of sponsorship on the installation.
- **Principles.** The governing philosophy of the Coast Guard Commercial Sponsorship Program.
- **Installation Specific Sponsorship Timeline/ Procedures.** Outline of the roles of each activity involved in the commercial sponsorship process.
- **Management Control Procedures.** The invoicing, recording, and accounting procedures of the installation Commercial Sponsorship Program.
- **Reports.** Reporting requirements of the installation.

Management Controls

Management controls are the checks and balances of the program. The commercial sponsorship manager has a fiduciary responsibility to the NAFI and must take every precaution to ensure that income, goods, and services are reported properly. Following prescribed internal control, accounting control, and local management control policies will safeguard you as the manager and guarantee the integrity of the sponsorship program. Management control procedures must be incorporated in your Commercial Sponsorship SOP.

Management controls should be developed locally for the receipt and disbursement of goods and services obtained through commercial sponsorship. For example, the commercial sponsorship staff would be required to sign the delivery ticket form at the time the sponsor's product is delivered. The sponsorship staff would then issue a receipt to the MWR activity when the goods or products are given to the activity manager who oversees the program hosting the sponsored event. The logistics branch will then add the property to the official installation property book. The management controls may vary from installation to installation. For an example of a *Key Management Control Form*, see Appendix S.

Record Keeping and Accounting Procedures

Staff members in charge of commercial sponsorship activities must keep accurate

records of all transactions to provide an audit trail for the receipt of all cash, goods, and services obtained through the sponsorship program. A separation of duties must be in place to ensure proper management controls as it relates to the receipt of moneys for sponsorship. All monetary transactions must be made by check. Sponsorship personnel should never receive the cash (check) payment from a sponsor. Cash (check) payments for any sponsorship should be mailed directly to your MWR Fund to be deposited and credited to the proper general ledger account.

SOP must contain management control procedures.

For every sponsored event involving a cash fee, an invoice documenting the dollar amount being charged should be produced. The invoice may be sent from the sponsorship representative. The invoice should include the fee charged, name of the event sponsored, and address for payment.

File Documentation

A file should be kept on each sponsorship initiative. The file should contain, at minimum, the following:

- Sponsor's name and organization
- Event or program sponsored
- Solicitation documentation
- Legal concurrence memo/form
- Signed agreement
- Amount of sponsor's assistance, cash, goods, and services (retail value)
- Copy of invoice
- Disposition of sponsor's assistance

Other documents that could be part of the file documentation process are:

- Telephone/conversation records
- Internal MOA's/MOU's
- Copies of thank-you letters
- After-action report

All sponsorship money must be properly deposited and accounted for.

Reports

Installations may want to record the amount of income generated by commercial sponsorship to measure the success of the program. The report should include:

- A cumulative cash figure.
- Net worth of any goods, services, and equipment obtained.
- A total value for the FY.

For a sample *Installation Report*, see Appendix T.

Chapter 12 - After-Action Reports

After-action Reports

An after-action report helps both parties - the event producer and sponsors - in documenting the event and measuring the sponsorship success. This report can show if there was fulfillment of the sponsorship agreement and can also be used as a basis for future event sponsorship negotiation. Before you begin creating the actual after-action report, take a look at the easiest way to collect the information needed in an after-action report.

Event Evaluation - Installation

It is important to gather information from all members of your event team. Internal evaluation can help your event grow and help you develop areas that need improvements. Three separate reports will be helpful in creating your after-action report. The reports suggested are the:

- Program manager's report
- Marketing report
- Sponsorship report

Program Manager's Report

As the "program manager," you need to summarize the event and list all the on-site logistics. This report should include:

- Overview. What actually happened in a concise format? What was the strategy? What happened on-site?
- Major event goals and objectives.
- Measurements of each goal's success.
- Summary of results: Attendance, sales, and so on.
- Conclusions and recommendations. Include information received from the internal evaluation forms.

For a sample *Program Manager's Report*, see Appendix U.

Marketing Report

The marketing report is essential in creating the after action report. Providing a list of publicity that was generated from your event is very important to the sponsors and for recruiting new sponsors in the future. Most sponsors greatly value publicity, and this added value in their sponsorship agreement can be the deciding factor for sponsoring future events with your installation. This report should include:

- All news releases that were sent out. Not all media will publicize your sponsors, even if they are in your news releases. If you include your releases in the Marketing Report when you create the after action report, you will be able to show the sponsors you mentioned them in your publicity pieces, even if the media edited them out.
- All print publicity, including all newsletter, newspapers, magazine articles, and other printed materials including advertising, flyers, table tents, programs, and so on.
- All radio promotions, including PSAs you sent out, a copy of spot or commercial on

tape (if available), and a listing of airtime from the radio station(s) if possible.

- All television promotions, including a copy of the spots or commercials and a dub of all news coverage about event on local, regional, or national stations.

For a sample *Marketing Report*, see Appendix V.

Sponsorship Report

As the “sponsorship manager,” you need to summarize the event as it pertains to sponsors. This report should include:

- Overview of sponsors. Who were the sponsors? What was their agreements?

What happened on-site?

- Sponsors’ major goals and objectives.
- Measurements of each goal’s success.
- Summary of results.
- Conclusions and recommendations. Include information received from the internal evaluation forms.

For a sample *Sponsorship Report*, see Appendix W.

Event Evaluation - Sponsors

It is important to gather information from all sponsors involved with your event. External evaluation can also help your event grow and help you develop areas that need improvements. It is important to show your sponsors that they have invested in an event that cares about their opinion and wants to make the event enjoyable for all groups involved. Showing that you want to develop a win-win relationship with your sponsors will help keep them from year to year. For a sample *External Evaluation Form*, see Appendix X.

After you collect these evaluation forms from your sponsors, it is time to arrange the wrap-up meeting and present them with the after action report.

Creating the After-action Report

The after-action report is an executive summary of the results of your event and is to be shared with your sponsors, members of your event team, and key installation staff. This report will force you to boil down all the event details into the key results and conclusions, thus highlighting your use of the event as a device to meet your goals and objectives. The most important thing to sponsors is *Return on Investment (ROI)*. Was your event worth their investment? The after-action report will help them make that decision. This is done by showing them goals were met or exceeded.

Keep Things Concise

It is important to keep the report short and to the point to encourage key people to actually read your materials. Use phrases and bullets whenever possible and outline information instead of using long paragraphs. Sponsors want to know the key details and will not read drawn-out explanations. Remember, they are just making sure the event was worth their investment. For a sample *After-action Report*, see Appendix Y.

Keep reports short.

The Wrap-up Meeting

Now that the project is completed, it's time to meet individually with each sponsor. Now is the time to review your goals and objectives and see how your sponsorship strategies worked. Depending on the size of the project and complexity of each sponsorship, you can prepare an evaluation agenda to guide your group to a meaningful discussion.

Begin with the Goals and Objectives

At the top of your evaluation agenda, begin by repeating the sponsors' goals and objectives for the event and the specific measurements you targeted. It is critical to review these details with the sponsors so everyone is reminded why sponsors chose to get involved with the event in the first place.

Follow with a Concise Agenda

After repeating your key goals, list the agenda for the meeting. Again, you could spend time recapping each piece of the event, but the specific purpose of this meeting is to evaluate important results and think about natural changes and development. Your agenda might begin with a welcome and presentation of the thank-you items.

The discussion should be structured, not disjointed and should progress into five different directions. One way to make sure this doesn't happen is to go through the event chronologically. Walk through the event in order including:

- The planning process.
- On-site implementation.
- Follow-up process.
- Show video, pictures, and other audio-visual presentation methods.

Set a Time Limit

Remember, the purpose of the meeting is to discuss how you as a team, event producer, and event sponsor met your goals and objectives, and how to specifically improve your results next time. Keep the discussion on a predetermined timetable and do not get too bogged down in any one area.

Produce Final Meeting Minutes

After this session, be sure to recap the details during the final meeting minutes and send them to all participants. Again, include your key results from other areas of the event. The sponsor will appreciate your help in recording these ideas.

Thank-yous

This section is dedicated to the theory that thank-you letters are worth thousands of dollars to the future of your event. The golden rule is: thank all sponsors - big and small!

Your Thanking Plan

Diagram the plan for thank-yous so you can be sure all of your key people are covered.

List all sponsors - big and small, monetary and in-kind. A small sponsor this year could be a huge sponsor in the future, if treated nicely. Use your event or command letterhead on these letters and try to get them out within two weeks after the event.

As the event producer/manager, you should personally thank all sponsors. If there was an honorary chairperson and celebrity host or Coast Guard official involved, they also may want to thank the sponsors. A thank-you note from the commanding officer on official letterhead is also appropriate. There could never be too many thank-yous sent to a sponsor. The two types of thank-yous are:

- Informal (phone calls and personal notes).
 - Formal (official letters, photos, and mementos).
- For a sample *Thank-you Letter*, see Appendix Z.

Informal Thank-yous

Remember to call each key person by name and make personalized comments about his or her individual success, as well as their organization's on-site presence at the event. This phone call should be made a few days after the event and often is a great opportunity to set up the wrap-up meeting time and location.

Formal Thank-yous

Formal thank-yous can be as easy as an official letter or card thanking the sponsor for their involvement, but the unique thank-yous are the ones they will always remember. Listed here are some ideas for a unique and memorable thank-you gift.

Imprinted Items

A T-shirt, jacket, coffee cup, or other imprinted item might be the perfect gift for your sponsors. Again, by using the event logo and/or name, date and a personalized name truly identifies the sponsor with the project, sharing the ownership and association. There might be items left over from your event such as posters or sportswear that can be customized, or maybe one of your vendors will help you create something really special.

Use remaining promo items to entice next year's potential sponsors.

Photographs Make Great Gifts

A framed photograph of the event with a caption of "Thanks" might be the perfect gift for your key sponsors. The event photograph will have special meaning to key players and will be a nice addition to their home or office. A shot of their actual on-site involvement or photos of the sponsor POC with key event celebrities is an even better memento for a job well done.

Conclude with a Positive Challenge

Your final statement sets the tone for the future of the project. Be sure to end with a positive challenge for the sponsors to continue their personal growth and success in event implementation, and for the event to again bring together a talented and committed group of sponsors.

Chapter 13 - Glossary of Terms

A

Advertisement - Public notice or announcement.

Agreement - A legally binding contract.

Attendance - Individuals present at your event or promotion.

B

Benchmarking - Looking at set of average standards to use as a loose measurement.

Bill stuffers - Small printed materials that can be included in bill statements or paychecks.

Brainstorming - The process of creating and documenting ideas from multiple people.

C

CGES – Coast Guard Exchange System

Chronological - Order of occurrence.

Circulation - Distribution of materials such as newspapers, news letters and so on.

Collateral materials - Promotional materials including flyers, tickets, posters, and point-of-sale pieces.

Commercial sponsorship - Commercial Sponsorship is the act of providing assistance, funding, goods, or services to a MWR event by an individual, agency, company, corporation, or other entity for a specific (limited) time in return for public recognition or advertising promotions.

Communication record - Record kept of any exchange of information, ideas, and details.

Copious - Exacting with attention to detail; plentiful.

Coupon - Detachable slip of paper giving entitlement to payment of interest or to some service.

Cover Letter - An introduction letter that accompanies sponsorship proposals.

Credentials - Letter or tag establishing the authority of the bearer.

Cross promotions - Separate activities that promote each other for the good of both participants.

Customization - Changing a base package to accommodate specific sponsor goals.

D

Database - Information captured in a computer and organized by like traits.

Demographics - The statistical study of human population, especially with reference to size and density, distribution, and vital statistics. Demographic segmentation breaks down the market by characteristics related to the consumer including age, income, sex, occupation (rank), education level, marital status, and active duty, reservists, retirees, civilian.

Donations - See *Gifts and donations*.

E

Electronic signboard - Moving lighted signage that is programmed with custom messages.

Equity - Fairness and justice.

Exchange - Military department store.

Exclusivity - Not shared with any others; sole source available at an event.

F

Fact sheet - One or two page overview of key information from the project/event.

Flyer - Widely-distributed handbill, small poster, and so on.

G

Gatekeeper - Person or items that get in the way from obtaining a desired contact.

Gifts and donations - Any gratuity, favor, discount, entertainment, hospitality, loan, forbearance, or other item having monetary value. Includes services as well as gifts of training, transportation, local travel, lodgings, and meals, whether provided in-kind, by purchase of a ticket, payment in advance, or reimbursement after the expense has been incurred. Gifts and donations may not be solicited, and acceptance or refusal is based on the need of the intended program.

Goodwill - Positive feeling or association that is generated by an event and may be transferred to a sponsor.

Gross impression - Total viewing number of a logo or name; determined by attendance reach and other factors.

H

Hard file - Paper file of documents and samples.

I

Impressions - An effect produced by the feelings or senses.

Incentives - Something that serves as a stimulus to action by appealing to self-interest.

In-kind - Products or services that are donated in addition to or in lieu of cash.

Intangible sponsor benefits - Sponsor benefits that not easily measured by standard means.

L

Listenership - Audience who hears communication (for example the number of people listening to a certain radio station).

Logo - A graphic symbol/mark identifying an event or organization.

M

Measurable - Notable, significant; capable of being measured or compared.

Media outlet - The type of media chosen to support the event (TV, radio, print, billboards).

Menu of opportunities - The listing of possible components of a sponsorship package.

Methodology - Principle, or practice of orderly thought or procedure applied to a particular branch of learning.

MOA - Memorandum of Agreement; memorandums that define general areas of conditional agreement between two or more parties — what one party does depends on what the other party does (for example, one party agrees to provide support if the other party provides the materials). MOAs that establish responsibilities for providing recurring reimbursable support should be supplemented with support agreements that define the support, basis for reimbursement for each category of support, the billing/payment process, and other terms conditions of the agreement.

Murphy's Law - The observation that whatever can go wrong, will.

N

Networking - The process of making business contacts.

News release - A bulletin prepared by the public relations department, announcing an event/activity to the press.

Nonappropriated funds – Cash and other assets received from sources other than congressional appropriations. NAFs are government funds used for the collective benefit of those who generate them. These funds are separate from funds that are recorded in the books of the Treasurer of the United States.

O

Opportunity overview - The brief listing of opportunities available in the sponsorship package.

P

Packaging - Combination of items considered as a unit.

Pitch - Practice talk or appeal intended to influence or persuade; a sponsorship sales presentation.

PMS color systems - Printing industry standard system for color matching.

POC - Point of contact at an organization.

Point-of-sale merchandising - Promotional materials used at a retail location to associate the product with the event.

Possibility selling - Style of communicating to the potential sponsor the possible options for an event.

Premium - Object or service that's offered for free as an inducement to buy something.

Prioritization - Establishing an order of importance based on urgency or need.

Product exclusivity - The contracted benefit that allows one brand of product/service at an event.

Promotional window - The amount of time focused on promoting and marketing an event and associated activities.

Psychographics - The statistical study of human population, especially with reference to mental life and behavior. Psychographic studies break down the market according to behavioral characteristics of consumers, including opinions, attitudes, beliefs, activities, and interests.

Public service announcement (PSA) - Promotional spot in radio/television to promote a non-profit organization or event.

Publicity - Information/awareness that is generated from your event in print, television, and /or radio.

R

Right of First Refusal - Opportunity offered in a sponsorship contract to sponsor at the same level the next time, year, etc.

S

Site map - Map of a location or event.

Script - The detailed timeline of all details of a project.

Signage - Flyers, signs, or banners.

Solicitation - A petition or persuasion document; the sponsorship sales package.

Solicited sponsorship - Response to sponsorship opportunities requested by the

Coast Guard.

Sponsor master files - Paper files including sponsor records, logos, and other information.

Sponsorship feedback - Questions sponsors answer to give opinions after an event.

Sponsorship proposals - Written documents offering sponsorship opportunities.

Sponsorship solicitation piece - Communications piece included in a sponsorship proposal.

Sub-activities - Smaller activities or events inside a larger event.

Systematic approach - Methodical or planned system to reach stated goals.

T

Table tents - Printed double-sided promotional materials usually folded and used on tables.

Tactics - The specific action steps to meet a stated goal.

Tagging advertising - Adding your event message to advertising that's currently running.

Tangible sponsor benefits - Benefits measurable by traditional means such as advertising, tickets, and giveaways.

Target audience - Persons/objects of effort or attention; the group targeted to receive the message.

Tray liner - Printed promotional material usually used with plastic trays in a food service environment.

U

Unsolicited sponsorship - Sponsorship proposals sent to the Coast Guard without the request by staff.

V

Venue - Location or place of event.

Viewership - The audience that sees communication (such as a television station); measured by number or households.

W

Word-of-mouth advertising - Positive comments made to friends or associates about an activity or event, possibly including sponsor involvement

Chapter 14 – Appendices

Appendix A: COMDTINST M1710.13 (series), CHAP 5., Commercial Sponsorship Policy

Following is the policy on commercial sponsorship as written in COMDTINST M1710.13 (series):

H. Commercial Sponsorship. Commercial sponsorship is the act of providing assistance, funding, goods, **equipment**, or services to MWR programs and events by an individual, agency, company, corporation or other entity (sponsor) for a specific (limited) time in return for public recognition or advertising promotions.

1. Local MWR programs are authorized to competitively solicit commercial sponsorships or accept unsolicited commercial sponsorships for MWR programs and events under the conditions contained within these guidelines. **Only MWR programs in support of MWR activities and functions are authorized to obtain commercial sponsorships.**

2. Tobacco sponsorship will not be solicited **or** accepted.

3. Soliciting alcoholic beverages sponsors, including beer is **not authorized**, but may be accepted, under the following conditions:

(a) If offered, i.e., unsolicited, MWR activities may accept and participate in any promotions of these products that are not directed predominantly or exclusively at the military market.

(b) MWR activities may accept unsolicited promotions provided the alcohol company sponsors similar events in civilian communities.

(c) Product sampling is not authorized.

4. Only sponsorships from U. S. firms will be solicited and accepted.

(a) In overseas areas, solicitation of non-U.S. firms (those not incorporated within the United States) is authorized with the commanding officer's approval provided solicitation is not in violation of SOFA or treaty agreements or in direct competition with any Armed Forces exchange. Any questions regarding the appropriateness of the commercial sponsorship by a non-U.S. firm should be directed to Commandant (G-WPX).

(b) Solicitation of foreign corporations having U. S. subsidiaries is authorized, (i.e., Toyota of America, etc.).

5. Only those suppliers or manufacturers that supply or produce personal consumer products or services may sponsor an MWR event. No exceptions. A company producing only military hardware does not meet the qualifications to sponsor a MWR event; however, a defense contractor, like General Motors, could qualify by sponsoring with one of its motor car divisions. Such sponsorships must be executed (signed) by the company's consumer products division.

6. **If not unsolicited**, sponsorships must be competitively solicited, which requires notifying **at least 3 companies**, if available, having the product or service deemed appropriate for the event.

(a) To satisfy this requirement, MWR officers/directors will prepare and send out a personalized letter to **those** companies capable of delivering the desired product or service. Documentation must be kept showing how the list was determined.

(b) An example format for a personalized solicitation letter is included as enclosure (13) *of the MWR Manual*.

(c) This letter not only serves as the vehicle to inform prospective sponsors of sponsorship opportunities, but also announces the event, contains an overall description of the event, forecasts number of participants, describes composition of market, etc.

(d) The letter also requests that companies who desire additional information (i.e., a complete proposal package) contact the local MWR officer/director by a specific date.

(e) Care must be taken to ensure an equal opportunity to participate in sponsorship is provided. All interested companies must be sent a complete proposal package, if requested.

7. All Coast Guard employees (military and civilian) shall refrain from informal sponsorship solicitation.

(a) Informal sponsorship solicitation is prohibited and may violate the Government's standards of conduct and ethics regulations.

(b) A business-like "arm's length" relationship must be maintained between the local command and prospective sponsors.

8. Commercial sponsorship of an event is **NOT** a program where a sponsor gives the command a gift or donation. Commercial sponsorship is an exchange of equal value agreed upon between the command and the sponsoring entity.

9. The specific intent of the commercial sponsorship program is to enable local MWR programs to obtain funds to offer events or services that would otherwise not be possible.

(a) Commercial sponsorship may not be used to underwrite the cost of a local command's MWR program other than for the events authorized by this guidance.

(b) Sponsorship profits may be used for other similar programs or as seed money for future sponsorship efforts.

(c) Sponsorship profits, if any, should not be used to cover MWR general and administrative expenses beyond those costs directly attributable to the event.

10. The solicitation of the maritime industry is prohibited to avoid giving the impression that these companies are subsidizing MWR program events to curry favors from the Coast Guard. **Unsolicited commercial sponsorship is also not authorized.**

11. Sponsorship agreements should be reviewed by legal counsel and approved by the commanding officer. A sample of a commercial sponsorship agreement is contained in enclosure (14) of *the MWR Manual*.

12. Caution must be used to not inadvertently imply that the Department of **Homeland Security** and the U. S. Coast Guard officially endorse any company, sponsor, or their products or services. A disclaimer, enclosure (15) of *the MWR Manual*, or equivalent, must be used for all sponsorships.

13. Unsolicited commercial sponsorship shall be treated the same as solicited commercial sponsorship **except that it does not have to be competitively bid or announced**. Unsolicited sponsorship is wholly and entirely initiated by the prospective sponsor without prior knowledge of the needs of the MWR program or unit. After an appropriate inquiry from a prospective sponsor, the MWR officer/director may inform the sponsor of any needs. The unsolicited sponsors should then furnish a letter or memorandum of intent to the unit. Unsolicited sponsorship is otherwise subject to the policies outlined above.

Appendix B: Sponsorship Opportunity Audit

The purpose of this worksheet is to document the details of a current event or project. Mark all boxes that fit each question, and fill in the details to the extent of your knowledge.

Overview Details

Project Name: _____ Date(s): _____
Year Founded: _____ Year Coast Guard began involvement: _____
Brief Description: _____

Total Number of Participants: _____

Demographics of Participants:

Age range: _____
Men% _____
Women% _____
Location: _____

Media and Promotions

How will media be used in promotion and publicity?

Media:

Television: Network___ Syndicated___ Satellite___ Local___

Who: _____

Radio: Local___ Regional___ National___

Who: _____

Print: Local___ Regional___ National___ Trade Publication___
Newspaper___ Tabloid/Journal___ Magazine___ Newsletter___

Who: _____

Other: _____

Who: _____

Pre-event Promotions: What promotions will you do?

Flyers___ Posters___ Direct-mail___ Table Tents___

Mini Events___ Sweepstakes___ Banners/Signs___

Other: _____

On-site Promotions: What promotions will you do?

Surveys___ Sampling___ Product Sales___ Test Drives___ Newsletter ___

Other: _____

Meeting Coast Guard Goals: What specifically do you plan to do?

Goal: _____

Event Meets the Goal By: _____

Measurements: _____

Goal: _____

Event Meets the Goal By: _____

Measurements: _____

Goal: _____

Event Meets the Goal By: _____

Measurements: _____

Goal: _____

Event Meets the Goal By: _____

Measurements: _____

Goal: _____

Event Meets the Goal By: _____

Measurements: _____

Staffing Requirements:

Role	Name
Overall Project Manager	_____
Media Director	_____
Volunteer Coordinator	_____
Sponsorship Liaison	_____
Results/Documentation Collector	_____

Creating the Sponsorship Support Budget

Photography:	Video:
Fee_____	Fee_____
Prints_____	Editing_____
Copies_____	Copies_____

Event Sportswear_____

Signage_____

Security_____

Mailings_____

Miscellaneous_____

Sponsor Hospitality_____

Food & Beverages_____

Tent_____

Signage_____

Other:_____

TOTAL PROPOSED BUDGET:_____

Implement Notes

Date individual project began:_____ Ended:_____

Did the project get any pre-event media coverage?

Newspaper___ Radio___ Television___ Magazine___ Other:_____

Event Activity Notes:

Weather: Temperature_____ Conditions_____

Staff on-site: Number_____ Total hours worked_____

On-site media coverage: Local___ Regional___ National___ Other:_____

Expenses incurred over budget:_____

Special Notes:_____

Program Evaluation

1. Meeting Your Goals

A. Goal: _____

Did you meet the goal? Yes___ No___

Measurements actually recorded: _____

B. Goal: _____

Did you meet the goal? Yes___ No___

Measurements actually recorded: _____

C. Goal: _____

Did you meet the goal? Yes___ No___

Measurements actually recorded: _____

D. Goal: _____

Did you meet the goal? Yes___ No___

Measurements actually recorded: _____

2. Personal Comments

Did the program work smoothly for you and your staff?

Yes___ No___

Please comment: _____

Do you want to repeat the project next year?

Yes___ No___

Please comment: _____

What would you change if you repeat this project? _____

Other Comments: _____

Evaluation Submitted by: _____

Title: _____

Command: _____ Date: _____

Appendix C: MOA

The following pages are a sample Memorandum of Agreement (MOA) between an installation and an association.

MEMORANDUM OF AGREEMENT BETWEEN COAST GUARD ACADEMY AND THE XYZ SPORTS ASSOCIATION

SUBJECT: COAST GUARD ACADEMY AND XXX SPORTS ASSOCIATION AGREEMENT TO ESTABLISH SPORTS CLINICS DURING SUMMER 2004

1. The purpose of this Memorandum of Agreement (MOA) is to delineate U.S. Coast Guard Academy and XYZ Sports Association responsibilities and commitments. This is regarding the operation of six to ten sports clinics. The clinics will take place at the Coast Guard Academy during summer 2004.
2. The outcome of this agreement is to improve the technical sport skills of Coast Guard active duty members. Equally critical components of the clinic will provide the members with life and coping skills. Coast Guard members will also receive instruction in health nutrition, substance abuse prevention, and physical conditioning. Local sports coaches will support the clinics. The successful completion of this program will lead to future growth in the number and scope of clinics run in future years with the XYZ Sports Association.
3. The U.S. Coast Guard Academy will:
 - a. Obtain commercial sponsorship to assist in reducing installation costs.
 - b. Coordinate MOA with installation and XYZ Sports Association.
 - c. Develop clinic handbook in conjunction with XYZ Sports Association for use at the Coast Guard Academy.
 - d. Coordinate with XYZ Sports Association during the initial stages of project planning until clinic agreement is in place.
 - e. Visit on-going sports clinics to evaluate program and ensure quality.
 - f. Coordinate after action reports from participating sites and oversee implementation of appropriate adjustments.
 - g. Conduct introductory training of all staff and volunteers along with the XYZ Sports Association.

- h. Initiate expansion of the program into 2005 and beyond.
- i. Design marketing plan for installation use.

4. The XYZ Sports Association will:

- a. Recruit coaches and active duty athletes.
- b. Print XYZ Sports Association clinic materials and provide materials necessary to conduct the clinics.
- c. Assist in modifying the clinics from half-day to multiple-day format.
- d. Provide technical assistance to the installation.
- e. Coordinate directly with installation staff.
- f. Ensure sports teams are prepared to travel and arrive at competition site in a timely manner.
- g. Take part in an on-going evaluation process and assist to make improvements in the program as needed.
- h. Coordinate with the U.S. Coast Guard Academy on selected clinic sites.

5. The provisions of this MOA are acceptable upon signature and date below. This MOA will be in effect for one year from the date signed and may be changed or terminated by any party with a 90 day notice.

Ms. Polly Summer,
MWR Director
U.S. Coast Guard Academy

Mr. Sam Sports,
CEO
XYZ Sports Association

Appendix D: Overall Planning Worksheet

Sponsorship Representative

POC: _____

Phone: _____ Fax: _____ Email: _____

Event / Program Name: _____

Date(s): _____ Location: _____

Description

Overview of Event / Program: _____

Demographics

Expected Attendance: _____

Targeted Audience: Age _____ Rank _____

_____ % Men _____ % Women

Event / Program History

Year Founded: _____ Brief History: _____

Past Sponsors: _____

Goals and Measurements (what specifically will this activity achieve?)

Goal 1: _____

Measurement of goal: _____

Goal 2: _____

Measurement of goal: _____

Goal 3: _____

Measurement of goal: _____

Project Management

	Name	Phone/Fax/Email
Chairperson/Main POC:	_____	_____
Sponsors:	_____	_____
Installation Support:	_____	_____
Volunteers:	_____	_____
Publicity:	_____	_____
Documentation:	_____	_____
Program/Entertainment:	_____	_____
Other:	_____	_____
Other:	_____	_____
Project Start Date:	_____	
Meeting Schedule:	_____	

Documentation

On-Site Photography: _____

On-Site Videography: _____

Key Items to Track: (Ticket sales, Concession sales, etc.)

Item	How to Track
1 _____	_____
2 _____	_____
3 _____	_____
4 _____	_____
5 _____	_____
6 _____	_____
7 _____	_____
8 _____	_____

Appendix E: Setting Goals and Objectives Worksheet

Name of Event: _____

Key Planning Team: _____

What are your goals and objectives?

1. Goal: _____
Specific Objectives: _____

2. Goal: _____
Specific Objectives: _____

3. Goal: _____
Specific Objectives: _____

4. Goal: _____
Specific Objectives: _____

How will you measure the achievement of these goals?

(Recap key measurements here)

1 _____

2 _____

3 _____

4 _____

Appendix F: Determining Event Needs Worksheet

1. Facilities/Infrastructure

Event Site
What we have: _____
What we need: _____
Key Contact: _____

Entertainment
What we have: _____
What we need: _____
Key Contact: _____

Lodging
What we have: _____
What we need: _____
Key Contact: _____

VIP/Sponsor Hospitality
What we have: _____
What we need: _____
Key Contact: _____

Signage
What we have: _____
What we need: _____
Key Contact: _____

Parking
What we have: _____
What we need: _____
Key Contact: _____

On-Site Transportation
What we have: _____
What we need: _____
Key Contact: _____

Food Services
What we have: _____
What we need: _____
Key Contact: _____

Utilities
What we have: _____
What we need: _____
Key Contact: _____

Stage/Sound System
What we have: _____
What we need: _____
Key Contact: _____

Waste Management
What we have: _____
What we need: _____
Key Contact: _____

Event Rentals What we have: _____
What we need: _____
Key Contact: _____

2. Human Resources/Expertise

Committee Leadership What we have: _____
What we need: _____
Key Contact: _____

Committee Volunteers What we have: _____
What we need: _____
Key Contact: _____

Paid Consultants What we have: _____
What we need: _____
Key Contact: _____

Legal Advisors What we have: _____
What we need: _____
Key Contact: _____

Financial Advisors What we have: _____
What we need: _____
Key Contact: _____

Production/Technical Advisors What we have: _____
What we need: _____
Key Contact: _____

Security Personnel What we have: _____
What we need: _____
Key Contact: _____

Medical Coverage What we have: _____
What we need: _____
Key Contact: _____

Artist / Designer What we have: _____
What we need: _____
Key Contact: _____

Set-up Support What we have: _____
What we need: _____
Key Contact: _____

Trash Clean-up Crew

What we have: _____
What we need: _____
Key Contact: _____

3. Other Services

Printing

What we have: _____
What we need: _____
Key Contact: _____

Silk Screening

What we have: _____
What we need: _____
Key Contact: _____

Ticket Sales

What we have: _____
What we need: _____
Key Contact: _____

Program Design

What we have: _____
What we need: _____
Key Contact: _____

Decorating

What we have: _____
What we need: _____
Key Contact: _____

Specialty Lighting

What we have: _____
What we need: _____
Key Contact: _____

Specialty Giveaway

What we have: _____
What we need: _____
Key Contact: _____

Photography

What we have: _____
What we need: _____
Key Contact: _____

Video Coverage

What we have: _____
What we need: _____
Key Contact: _____

Communications System

What we have: _____
What we need: _____
Key Contact: _____

Warehousing

What we have: _____

What we need: _____
Key Contact: _____

4. Finances

Basic Planning Budget

What we have: _____
What we need: _____
Key Contact: _____

Installation MWR Fund

What we have: _____
What we need: _____
Key Contact: _____

Sponsorship Cash Support

What we have: _____
What we need: _____
Key Contact: _____

Sponsorship/In-kind Services

What we have: _____
What we need: _____
Key Contact: _____

Ticket Sales

What we have: _____
What we need: _____
Key Contact: _____

Concessions/Souvenir Sales

What we have: _____
What we need: _____
Key Contact: _____

Other:

What we have: _____
What we need: _____
Key Contact: _____

Other:

What we have: _____
What we need: _____
Key Contact: _____

After you complete the worksheet, record for your committee some basic statements:

Commitment Parameters

Facilities/Infrastructure: We are ready to host this event after we are assured of:

Human Resources/Expertise: We need to bring together the following key players to contribute to this event:

Other Services: We cannot forget these other key needs, including:

Finances: We have the following avenues of support for our event:

Now you have begun the process of identifying all the pieces of your event success.

Appendix G: Building a Budget Worksheet

Use this worksheet to document the values of all of your event needs.

Event Expenses

	Low-end projection	High-end projection
Facilities/Infrastructure		
Event Site	_____	_____
Misc. labor or production charges	_____	_____
Utilities	_____	_____
Miscellaneous other	_____	_____
Entertainment		
Lodging for entertainers	_____	_____
Contract rider additions	_____	_____
Special transportation	_____	_____
Additional skilled labor	_____	_____
Miscellaneous other	_____	_____
Production		
Stage rental	_____	_____
Skirting/steps	_____	_____
Metal structure for lighting	_____	_____
General lighting	_____	_____
Special lighting for video	_____	_____
Sound system/stage monitors	_____	_____
Microphones (what type needed)	_____	_____
Podium	_____	_____
Backdrop	_____	_____
Special banner/signage	_____	_____
Video projection (front or rear)	_____	_____
Slides (projector/screen)	_____	_____
Production rental	_____	_____
Special electrical wiring	_____	_____
Miscellaneous other	_____	_____
Signage System		
Overall signs and/or banners	_____	_____
Directional signs (site markings)	_____	_____
Food service prices/menus	_____	_____
Sponsor recognition signs	_____	_____
Special signage (safety, medical)	_____	_____
Miscellaneous other	_____	_____
Promotional Costs		
Logo design	_____	_____
Invitations (design and printing)	_____	_____
Flyers (design and printing)	_____	_____

Letterhead and envelopes	_____	_____
Advertising (print)	_____	_____
Production of radio or TV spots	_____	_____
Program design/printing	_____	_____
Photography of event	_____	_____
Video coverage of event	_____	_____
Weather considerations	_____	_____
Rain plan costs	_____	_____
Additional canopies	_____	_____
Additional tents/flooring/sides	_____	_____
Rain insurance	_____	_____
Additional labor on crews	_____	_____
Umbrellas/rain ponchos	_____	_____
Miscellaneous other	_____	_____
Waste Management System		
Restroom facilities	_____	_____
Trash system	_____	_____
Labor to do trash	_____	_____
Vehicles to move/remove trash	_____	_____
Trash receptacles (bags, other)	_____	_____
Miscellaneous other	_____	_____
Event Rentals		
Tables	_____	_____
Tents (tent siding)	_____	_____
Tent pole draping	_____	_____
Chairs	_____	_____
Linens	_____	_____
Canopies	_____	_____
Pipe and drape	_____	_____
Special props/decoration	_____	_____
Carpeting/flooring	_____	_____
Air conditioning/heating	_____	_____
Floral arrangements/plants	_____	_____
Miscellaneous other	_____	_____
Parking		
Valet parking (special insurance)	_____	_____
Security for parking	_____	_____
Shuttle system/vehicle rental	_____	_____
Signage/marketing system	_____	_____
Labor to park attendees	_____	_____
Lighting for parking area	_____	_____
Parking personnel (uniforms?)	_____	_____
Miscellaneous other	_____	_____
On-site Transportation		
Golf carts	_____	_____
Movement of entertainers/VIPs	_____	_____

Staff vehicles	_____	_____
Miscellaneous other	_____	_____
Food Services		
Covering for food areas (tents?)	_____	_____
Special seating area	_____	_____
Water hook- ups	_____	_____
Service area (tents/counters)	_____	_____
Storage for supplies	_____	_____
Miscellaneous other	_____	_____
Utilities (electrical/water)		
Additional water access	_____	_____
Special hook-ups for production	_____	_____
Lighting for safety on site	_____	_____
Coverage of any wiring (for safety)	_____	_____
Miscellaneous other	_____	_____
VIP/Sponsor Costs		
Lodging	_____	_____
Meals	_____	_____
Hospitality suite food and drink	_____	_____
Special signage	_____	_____
Printing for passes/tickets	_____	_____
Additional security	_____	_____
Hosts/hostesses	_____	_____
Special giveaway items	_____	_____
Transportation	_____	_____
Miscellaneous other	_____	_____
Expertise/Key Resources		
Committee expenses	_____	_____
Volunteer expenses	_____	_____
Paid consultants	_____	_____
Type:_____	_____	_____
Type:_____	_____	_____
Security coverage	_____	_____
Medical coverage	_____	_____
Setup support	_____	_____
Trash/clean-up	_____	_____
Miscellaneous other	_____	_____
Other Miscellaneous Costs		
Event insurance coverage	_____	_____
Ticket sales costs (labor/printing)	_____	_____
Promotion/paid advertising	_____	_____
Warehousing of materials	_____	_____
Specialty insurance	_____	_____

Add the columns to get low-end and high-end estimates for an event budget range.

Overall Expense Estimates	_____	_____
---------------------------	-------	-------

Appendix H: Action Plan

The following pages are a sample of an action plan and timeline for the 2004 3-on-3 Gus Macker Basketball Tournament.

Due Date	POC	Task	Status
11 Dec 03	Scott	Create Letterhead	Complete
18 Dec 03	Kari	Letter to Bob Klein on 2004 Gus Program	Complete
18 Dec 03	Scott	First Draft Volunteer Packets	Complete
18 Dec 03	Kari	Meet Mr. Parker: 03 evaluation/04 entry form	Complete
01 Jan 04	Kari	Update Channel 4 contract	Complete
01 Jan 04	Scott	Secure P.O. Box	Complete
01 Jan 04	Kari	Submit request for outdoor site	Complete
08 Jan 04	Kari/Scott	Meet Bob Klein on 2004 Gus Program	Complete
15 Jan 04	Kari	Meet with Mallett on concessions	Complete
15 Jan 04	Kari	Finalize Budget	Complete
22 Jan 04	Scott	Put together final Volunteer Packets	Complete
22 Jan 04	Scott	Update volunteer database	Complete
22 Jan 04	Kari/Rick	Set meeting with all past sponsors	Complete
22 Jan 04	Kari/Rick	Set meeting with all new sponsors	Complete
22 Jan 04	Kathleen	Reserve blocks with local hotels	Complete
22 Jan 04	Kari	Request quotes from vendors	Complete
29 Jan 04	Scott	Print Brochures	Complete
29 Jan 04	Kathleen	Set meeting dates with local hotels	Complete
29 Jan 04	Scott	Get bulk rate quotes	Complete
29 Jan 04	Scott	Get printer quotes for the "Gussette"	Working
29 Jan 04	Kathleen	Inventory banners, trophies, and plaques	Working
05 Feb 04	Kari	Contact Municipal to close North Street	Meeting Set
05 Feb 04	Kari	Get permit for street closings	Working
05 Feb 04	Kari	Get permit from Fire Marshall	Meeting Set
05 Feb 04	Kari/Scott	Put together final entry form	Working
05 Feb 04	Scott	Update "Gussette" advertisements	Working
05 Feb 04	Scott	Update Court sponsorship sheets	Working
05 Feb 04	Kari	Set meeting with Markey's Audio/Visual	Working
05 Feb 04	Kari	Create radio and golf cart plan	Working
08 Feb 04	Kari/Rick	Sign agreements with all sponsors	With Legal
12 Feb 04	Scott	Send out letters to volunteer organizations	Working
12 Feb 04	Scott	Finalize "Gussette" printing prices	Working
12 Feb 04	Scott	Set "Gussette" print deadlines	Working
12 Feb 04	Kari	Send PR to rental vendors	Contracting
12 Feb 04	Kari	Send info to Wellness Sports Medicine	Working
12 Feb 04	Scott	Contact local Ambulance	Meeting Set
26 Feb 04	Kathleen	Recruit Volunteers for "GusBuster"	Working
26 Feb 04	Kathleen	Establish "GusBuster" Volunteer Meeting	Working
26 Feb 04	Kari	Create Gus Macker publicity plan	Working

26 Feb 04	Kari	Mail verification letters to vendors	Draft Form
26 Feb 04	Kari	Send PR for hotel rooms	Contracting
01 Mar 04	Scott	Final draft entry forms to printer	Working
01 Mar 04	Kathleen	"GusBuster" status report to Mr. Klein	Working
01 Mar 04	Kari	Determine Kick-Off Promotion	Working
04 Mar 04	Scott	Develop media packets	Working
04 Mar 04	Kari/Rick	Establish distribution plan with Marsh/Pepsi	Working
04 Mar 04	Scott	Follow up calls to volunteer organizations	Working
04 Mar 04	Kari	Secure event insurance	Get Quotes
04 Mar 04	Kari	Send letters to radio stations	Working
18 Mar 04	Scott	Send out entry forms	Working
18 Mar 04	Rick	Ad materials to all stores	Printing
18 Mar 04	Rick	Gather prizes from Marsh/Pepsi	Working
25 Mar 04	Rick	Entry forms to distribution points	Printing
25 Mar 04	Kari	Q-95 spots run	At station
25 Mar 04	Kari	WTTV spots run	At station
25 Mar 04	Kari	Approval of site plan	Working
31 Mar 04	Kari	Promo contests on Q-95/WTTV	At stations
31 Mar 04	Scott	Team entry forms to sponsors and media	Printing
08 Apr 04	Kari	Promo contests on Q-95/WTTV	At stations
15 Apr 04	Scott	Preliminary layout of "Gussette"	Working
22 Apr 04	Scott	Deadline for "Gussette"	Working
22 Apr 04	Kari	Insurance certificate to Macker	Pends
22 Apr 04	Kathleen	Order volunteer t-shirts	Working
22 Apr 04	Scott	Ad deadline for sponsors & sales	Working
22 Apr 04	Kari	Deadline for sponsor parking requirements	Pends
24 Apr 04	Kari	Deadline sponsor agreements	At Legal
29 Apr 04	Scott	"Gussette" layout due	Working
29 Apr 04	Kari	Send game times to Lee Garrett	Pends
29 Apr 04	Kari	News release deadlines to all papers	Working
06 May 04	Kathleen	Deadline for volunteer schedule	Working
06 May 04	Kari	Send follow up to outlets on registration	Working
06 May 04	Kari	Deadline for names to insurance company	Working
06 May 04	Scott	"Gussette" to printer	Working
06 May 04	Kari	Deadline radio and golf cart plans	Working
13 May 04	Kathleen	Order "GusBuster" uniforms	Contracting
13 May 04	Kathleen	Order trophies	Contracting
13 May 04	Kathleen	Order all banners and signs	Contracting
13 May 04	Kari	Confirm all vendors	Working
18 May 04	Kari	Deadline for team entry	Working
20 May 04	Kathleen	Follow up on all orders	Working
27 May 04	Kari	Finalize script	Working
27 May 04	Scott	Mail "Gussette" to all players	Pends
27 May 04	Scott	Schedules mailed to team captains	Pends
27 May 04	Kari	Send final press release	Working
27 May 04	Kathleen	Confirm delivery of orders/equipment	Working

03 Jun 04	Kathleen	Conduct volunteer meeting	Preparing
03 Jun 04	Kathleen	Conduct "GusBuster" meeting	Preparing
03 Jun 04	All	All equipment loaded to truck	Pends
08 Jun 04	Kari	Final staff assignments	Pends
08 Jun 04	All	Event set up begins	Pends
09 Jun 04	Kari	Safety Officer Inspection	Pends
10 Jun 04	Kari	Gus Macker 3 on 3 Basketball Tournament	Pends
11 Jun 04	Kari	Gus Macker 3 on 3 Basketball Tournament	Pends
18 Jun 04	Kari	Follow up meeting with all sponsors	Pends
25 Jun 04	Kari	Complete after action report	Pends
03 Aug 04	Kari	Develop list of potential new sponsors	Pends
10 Aug 04	Kari	Send proposals for 2005 sponsors	Pends

Appendix I: Job Description Worksheet

Event _____
Date _____
Place _____

Design your committee "job descriptions" using specific tasks and responsibilities.
Rework the information from your Event Needs Worksheet (Appendix D):

Main POC Name: _____

Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

PR/Marketing Chairperson Name: _____

Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Entertainment Chairperson Name: _____

Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Operations Chairperson Name: _____

Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Sponsorship Chairperson Name: _____

- Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Food and Beverage Chairperson Name: _____

- Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Hospitality Chairperson Name: _____

- Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Volunteer Chairperson Name: _____

- Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Other: _____

- Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Other: _____

- Tasks: 1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Appendix J: Communications Record

Time: _____ Date: _____

Taken by: _____

Name: _____

Company: _____

Contact info: _____

Phone: _____

Fax: _____

Email: _____

Address: _____

City: State: Zip: _____

Subject: _____

Details: _____

Action: _____

Appendix L: What We Can Provide to Sponsors Worksheet

Event / Program Name: _____
Location(s): _____ Date(s): _____
POC: _____
Phone: _____ Fax: _____ Email: _____
Overview: _____

Check all that you are able to provide to a potential sponsor:

Pre-Event

- Title sponsor (name in event title)
- Name in event logo
- Input into event logo look / colors
- Collateral materials (record numbers)
- Brochures Flyers Publicity
- Tickets Banners

TV (Number of releases): _____

Radio (Number of releases): _____

Print Ads (Number of releases): _____

On-Site

- Product / brand exclusivity on site
 - T-shirts / hats, etc., on volunteers: # _____
 - Banners: # _____; Signs: # _____; Flyers: # _____
 - VIP hospitality: # of tickets / passes _____
 - Parking:
 - Taped announcements: # _____; length _____
 - Scripted announcements: # _____; length _____
 - Sampling: _____
 - Sales opportunities: _____
 - Surveying: _____
 - Inflatables: _____
 - Participation in event (describe): _____
- _____

After-Event

- Documentation of event (prints, slides, or video)
- Commemorative / collector mementos or gifts:
- Recognition by installation VIPs (management/command)
- After-event article
- Opportunity for first refusal of future sponsorship
- Post-event publicity: print radio TV

Past Sponsors

Company

Contact

Potential Sponsors

Company

Contact

Inappropriate Sponsors

Company

Contact

Appendix M: Pricing Worksheet

Event Name: _____

Event Date: _____

	Estimated value per impression	Attendance Quantity	Impressions per person	Estimated total value
Pre-event				
Brand/product exclusivity	_____ X	_____ X	_____ =	_____
Publicity	_____ X	_____ X	_____ =	_____
Merchandising/ promotions	_____ X	_____ X	_____ =	_____
Advertising:				
Print	_____ X	_____ X	_____ =	_____
TV	_____ X	_____ X	_____ =	_____
Radio	_____ X	_____ X	_____ =	_____
Billboards	_____ X	_____ X	_____ =	_____
Exposure at venues	_____ X	_____ X	_____ =	_____
Signage	_____ X	_____ X	_____ =	_____
Collateral materials	_____ X	_____ X	_____ =	_____
At-the-event				
Program ad	_____ X	_____ X	_____ =	_____
Coupons	_____ X	_____ X	_____ =	_____
On-site visibility:				
T-shirts	_____ X	_____ X	_____ =	_____
Trucks	_____ X	_____ X	_____ =	_____
Inflatables	_____ X	_____ X	_____ =	_____
Signage	_____ X	_____ X	_____ =	_____
Displays	_____ X	_____ X	_____ =	_____
Sampling/selling	_____ X	_____ X	_____ =	_____
Consumer research	_____ X	_____ X	_____ =	_____
PA announcements	_____ X	_____ X	_____ =	_____
Hospitality:				
Tickets	_____ X	_____ X	_____ =	_____
Parking	_____ X	_____ X	_____ =	_____
Gifts	_____ X	_____ X	_____ =	_____
Giveaways	_____ X	_____ X	_____ =	_____

	Estimated value per impression	Attendance Quantity	Impressions per person	Estimated total value
Post-event				
Right of first refusal	_____ X	_____ X	_____ =	_____
Recognition items	_____ X	_____ X	_____ =	_____
Coast Guard publicity	_____ X	_____ X	_____ =	_____
Positive advertising	_____ X	_____ X	_____ =	_____
Use of database	_____ X	_____ X	_____ =	_____
Intangibles				
Association with the event	_____ X	_____ X	_____ =	_____
Exposure to leadership	_____ X	_____ X	_____ =	_____
Access to related events	_____ X	_____ X	_____ =	_____
Total Package Value:				_____

Appendix N: Cover Letter

The following page is a sample Cover Letter.

U.S. Department of
Homeland Security

United States
Coast Guard



Commandant
United States Coast Guard
Office of Exchange and Morale

870 Greenbrier Circle
Tower II – Suite 502
Chesapeake, VA 23320-2681
Staff Symbol: (G-WPX)
Phone: (757) 420-2480
Fax: (757) 420-0569
Email: RDavis@gwp.uscg.mil

1710
December 23, 2004

Name
Title
Company
Address

Dear _____

Here's an opportunity you just can't pass up! The Coast Guard Academy's 2004 Summer Concert Series. In addition to logo coverage on all media and at each concert site, we also have display options at our retail stores and event sites. Other features include: video wall advertisements, VIP tickets and sampling opportunities.

Please contact me at (123) 456-7890, or PSummer@cgacademy.gov, if you would like a customized proposal, designed for your company.

Thank you for considering the Coast Guard Academy's 2004 Summer Concert Series. I look forward to hearing from you soon.

Sincerely,

Polly Summer
MWR Director
U. S. Coast Guard Academy
By direction

Encl: Sponsorship Opportunities Brochure for the entire year.

Appendix O: Sample Opportunity Overview

Following is the sample letter announcing commercial sponsorship opportunities as written in Enclosure 13 of COMDTINST M1710.13 (series):

DATE

Name (if available)
Title (if available)
Company
Address

Dear _____

Sponsorship opportunities are available for the (Name of Event) conducted by the Morale, Well-Being, and Recreation (MWR) activities of (Name of unit).

Brief description of event to include:

- Date.
- Location.
- Target market(s) and expected number of participants/spectators. This includes active duty members and/or their dependents and civilian employees. Specify by category.
- Brief description of the event. If established event, give brief summary of past success(es).

Sponsorships are available for this event at various levels. Sponsorship opportunities include signs, banners, product sampling, title recognition, product sales rights, etc. Sponsorship packages are tailored to provide maximum exposure and visibility for you. Our MWR representative will work individually with you to ensure that you achieve your sponsorship objectives.

If you are interested in being a part of this exceptional event, please contact (Name, Title) at (Phone Number) for a complete proposal package. Deadline for submitting your proposal is (date).

We look forward to working with you for our mutual benefit.

Sincerely,

D. A. CHARLES
MWR Director
U. S. Coast Guard
By direction

Appendix Q: Sample Sponsorship Agreement

Following is the sample sponsorship agreement as written in Enclosure 14 of COMDTINST M1710.13 (series):

This agreement ("AGREEMENT") made and entered into by and between the (Name and address of Unit MWR FUND) ("FUND") and (Name and address of SPONSOR) ("SPONSOR") and (Name and address of CO-SPONSOR if any) ("CO-SPONSOR").

The FUND seeks to promote positive, healthy, and active participation in leisure and recreational programs for the Coast Guard family;

The FUND plans to conduct (type of event), ("EVENT") at (location of); and

SPONSOR and CO-SPONSOR desire to co-sponsor such event, which sponsorship would include promotional product tie-ins for (name of product/s) ("PRODUCT").

In consideration of the premises and mutual promises set forth herein, the parties, intending to be legally bound, hereby agree as follows:

1. EVENT. During the (period of event/s), FUND agrees to conduct the following:

- (a) (description of event)
- (b) (description of additional events if applicable)

FUND designates SPONSOR and CO-SPONSOR as the only corporate SPONSORS of the event and agree to work with CO-SPONSOR promotional tie-ins. FUND agrees that CO-SPONSORS may advertise their sponsorship of the event/s.

2. MWR Responsibilities. Each FUND will:

(a) Provide the (whatever) and all logistical support and requirements to conduct each EVENT.

(b) Provide adequate professional staff to plan, organize, promote, conduct, and evaluate each EVENT.

(c) If applicable, coordinate with the local Coast Guard Exchange regarding dates and times to ensure effective in-store promotional tie-ins for PRODUCTS.

(d) Provide an endorsement disclaimer on promotional materials distributed in connection with the EVENT.

3. CO-SPONSORS' Responsibilities. In exchange for promotional tie-ins with the EVENT, CO-SPONSORS will:

(a) (Example) Provide T-shirts for EVENT participants at an estimated maximum total of (number of shirts). CO-SPONSORS and MWR logos will be featured. CO-SPONSORS will develop, produce, and deliver the shirts to MWR. MWR will approve the design of the T-shirts. The cost for developing, producing and delivering the T-shirts will be borne 50/50 (or other agreed upon proportion) by CO-SPONSORS.

(b) Provide (describe other advertisement i.e. signs, banners)for EVENT site. Advertisement shall feature PRODUCTS' logos. CO-SPONSORS will develop, produce, and deliver the (list advertisements) to FUND. The cost for developing, producing, and delivering the (banners) will be borne 50/50 (or other agreed upon proportion) by CO-SPONSORS.

(c) Provide FUND with camera-ready art for PRODUCTS' logos for flyers, registration forms, etc. to be produced and distributed by MWR.

(d) Provide free samples of PRODUCTS to all EVENT participants.

(e) Coordinate with local FUND and Coast Guard Exchange to provide in-store promotional tie-ins in the form of existing point-of-sale and display materials.

4. Trademark License.

(a) SPONSOR hereby grants CO-SPONSOR and FUND a royalty-free, non-exclusive license to use and display the trademarks associated with PRODUCTS. Such use shall be limited solely to the duration of the sponsorship of the EVENT and any advertising or promotional activities relating thereto. CO-SPONSORS and FUND shall not use any of the SPONSOR's trademarks in a way which would cause any person reasonably to infer, or otherwise convey the impression, that CO-SPONSOR and FUND are in any way affiliated with or otherwise acting on behalf of SPONSOR, which may be detrimental to SPONSOR's interest. SPONSOR shall provide CO-SPONSOR and FUND specific instructions for using SPONSOR's trademarks; CO-SPONSOR and FUND shall promptly comply with such instructions. CO-SPONSOR and FUND acknowledge that the provisions of this paragraph do not convey the right, title, or ownership interest in the trademarks.

(b) Except as expressly provided herein, neither CO-SPONSORS nor FUND shall have the right to use in any way the corporate or trade name, trademark(s), service mark(s), logo(s), or other identification of the other parties without their prior written consent.

5. Term and Termination. The term of this AGREEMENT shall commence as of (date) , ____ and shall continue until (date) , _____. Any party may immediately terminate this AGREEMENT upon a material breach of any term or condition hereof.

6. Right of First Refusal. Upon termination of this AGREEMENT, CO-SPONSORS shall have the right of first refusal to renew this sponsorship AGREEMENT provided that

the FUND conducts this EVENT during this timeframe in (year). As used herein, the right of first refusal shall mean that if FUND receives a "bona fide offer" (as hereinafter defined) regarding sponsorship from a third party (i.e, another SPONSOR), then FUND shall be obligated to communicate such offer to CO-SPONSORS, and permit CO-SPONSORS, at their option, to offer to contract with FUND, either individually or as CO-SPONSORS, on terms no less favorable to FUND than those contained in the bona fide offer of the third party. In no event shall FUND enter into a contract with a third party upon terms and conditions more favorable to such third party than those offered to CO-SPONSORS, unless such terms have first been offered to CO-SPONSORS. As used herein, the term "bona fide offer" shall mean a proposed agreement concerning rights and obligations similar to those herein, which agreement if executed by FUND and the third party, would be legally binding.

7. Competitive Advertising. FUND warrants and agrees that it has not, and during the term hereof will not, grant to anyone other than the CO-SPONSORS the right to sponsor or advertise competitive PRODUCTS during the EVENT.

8. Insurance. (Note: The following insurance clause is optional dependent upon the risk associated with the sponsorship, e.g., in-kind sponsorship of t-shirts would not require this clause. Further, any item or service procured by MWR or the Coast Guard Exchange System does not require the use of this clause.) CO-SPONSORS shall at their own expense, procure and maintain during the entire performance period of this AGREEMENT, general liability insurance wherein the FUND and the United States are included as named insured stating that such insurance is primary. (Secondary to, or contributory to no other insurance). The policy limits of \$500,000 per person - \$1,000,000 per occurrence for injury or death, and \$100,000 property damage per occurrence are required. CO-SPONSORS are responsible for damage or loss to their owned or leased equipment. Claims will be honored only if it can be shown that the FUND was negligent and caused damage or loss to their equipment.

9. Disputes. Except as otherwise provided in this AGREEMENT, any dispute or claim concerning this AGREEMENT which is not disposed of by consensus among the parties, shall be decided by the Commanding Officer, who shall state his/her decision in writing and mail or otherwise furnish a copy of it to the CO-SPONSORS. The decision shall be final and conclusive provided that the CO-SPONSORS shall be afforded an opportunity to be heard and to offer evidence in support of any appeal under this clause. Pending final decision on such a dispute, however, the CO-SPONSORS shall proceed diligently with the performance of this AGREEMENT.

10. Termination for Default. The FUND, by written notice, may terminate this AGREEMENT in whole or in part for failure of the CO-SPONSOR to perform any of the provisions hereof. In such event, the CO-SPONSOR shall be liable for damages including the excess cost of procuring similar supplies or services, provided that, if (i) it is determined for any reason that the CO-SPONSOR was not in default; or (ii) CO-SPONSOR's failure to perform is without his or her (or subcontractor's) control, fault, or negligence, the termination must be deemed to be a termination for convenience. As

used in this provision, the term "subcontractor" means subcontractor of the CO-SPONSOR at any tier.

11. Termination for Convenience. The FUND, by written notice, may terminate this AGREEMENT, in whole or in part when it is in the best interest of the FUND. If this AGREEMENT is for supplies and is so terminated, the CO-SPONSORS shall be compensated for supplies already provided. To the extent that this AGREEMENT is for services and is so terminated, the FUND shall be liable only for payment according to the payment provisions of this AGREEMENT, for services rendered prior to the effective date of termination providing there are no CO-SPONSORS claims covering non-recurring costs for capital investment. If there are any such CO-SPONSORS claims, they shall be settled according to Section 10 of this AGREEMENT.

12. Independent Contractor. CO-SPONSORS and the FUND shall be and act as independent contractors, and under no circumstances shall this AGREEMENT be construed as one of agency, partnership or joint venture of employment between the FUND, SPONSOR and CO-SPONSOR. None of the personnel under contract to, employed by or volunteering for the FUND, shall be deemed in any way to have any contractual relationship with CO-SPONSORS whatsoever. The FUND shall be solely responsible for the conduct of its employees, personnel, and agents in connection with their performance of the FUND's obligation hereunder.

13. Force Majeure. No party shall be responsible for events beyond its reasonable control, such as acts of God, weather delays, government restrictions, or unforeseen commercial delays. If any of the EVENT(s) are postponed due to inclement weather or other conditions beyond the Coast Guard's control, they may be rescheduled for another time. CO-SPONSORS shall then be entitled to, and the FUND agrees to give the CO-SPONSORS, all of the advertising and sponsorship rights set forth herein at no additional charge to CO-SPONSORS.

14. Notices. All notices required or permitted hereunder shall be deemed duly given if sent by certified mail, postage prepaid, and addressed to the parties as follows:

If to SPONSOR: Name and address of SPONSOR.

If to CO-SPONSOR: Name and address.

If to FUND: Name and address.

15. Assignment. This AGREEMENT is not assignable in whole or in part by any party hereto in the absence of the prior written consent of the other party.

16. Entire AGREEMENT. This AGREEMENT contains the entire understanding between the parties hereto relating to the subject matter contained herein and supersedes any and all prior agreements, arrangements, communications or

representations, whether oral or written. This AGREEMENT may not be amended, altered, modified or changed except in writing, signed by both parties hereto.

IN WITNESS WHEREOF, the parties hereto have caused this AGREEMENT to be executed.

SPONSOR

By:

Title:

Date:

FUND

By:

Title:

Date:

CO-SPONSOR

By:

Title:

Date:

Title:

Date:

Appendix R: Sample Sponsorship Agreement Addendum

This addendum is made to the sponsorship agreement between the Coast Guard Academy and XYZ Sports Association for the 2004 Coast Guard Marathon.

The date of the EVENT is changed to March 8, 2004.

IN WITNESS WHEREOF, the parties hereto have caused this AGREEMENT to be executed.

SPONSOR

By:

Title:

Date:

FUND

By:

Title:

Date:

CO-SPONSOR

By:

Title:

Date:

Title:

Date:

Appendix S: Key Management Control Form

COMMERCIAL SPONSORSHIP KEY MANAGEMENT CONTROL FORM

The following was developed in accordance with the DoDI 1015.14, Establishment, Management, and control of Nonappropriated Fund Instrumentalities and Financial Management of Supporting Resources, dated 16 July 2003, COMDTINST M1710.13 (series), and the Army Sponsorship Desk Reference Book, dated 3 June 1996. This is not intended to be an all-inclusive guide.

I. MANAGEMENT CONTROLS

- | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1. Is property obtained through commercial sponsorship identified and properly accounted for? | YES | NO |
| 2. Is property received for use as resale inventoried? | YES | NO |
| 3. If fixed assets (equipment or other property) valued at over \$2,500 are received through commercial sponsorship, are property records maintained in accordance with the MWR Manual, Chapter 8? | YES | NO |
| 4. Has the "commercial sponsorship representative" established a Standing Operating Procedure (SOP)? | YES | NO |
| 5. Has the SOP been coordinated and approved by command? | YES | NO |
| 6. Does the commercial sponsorship representative have the MWR Manual, COMDTINST M1710.13 (series) on hand and familiar with the commercial sponsorship policy? | YES | NO |

II. PROGRAM POLICY

- | | | |
|-------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1. Does the commercial sponsorship program support ONLY MWR programs and events? | YES | NO |
| 2. Are solicitation proposals made by the commercial sponsorship representative or other designated/trained individual. | YES | NO |
| 3. Are solicitation proposals announced in accordance with the MWR Manual, Chapter 5. | YES | NO |

- | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 4. Is local CGES management informed of commercial sponsorship initiatives to ensure that existing CGES contracts or agreements are not violated? | YES | NO |
| 5. Are tobacco agreements entered into? | YES | NO |
| 6. Are alcoholic beverage sponsorship agreements entered in accordance with the MWR Manual, Chapter 5? | YES | NO |
| 7. Is the commercial sponsorship representative or other designated/trained individual familiar with the Coast Guard policy governing ethics? | YES | NO |
| 8. Does the written commercial sponsorship agreement contain all the information included in the MWR Manual, Enclosure 14? | YES | NO |
| 9. Has the written commercial sponsorship agreement been reviewed by your servicing legal office and approved by your commanding officer? | YES | NO |
|
III. RECORD KEEPING AND ACCOUNTING PROCEDURES | | |
| 1. Are all monetary commercial sponsorships made by check? | YES | NO |
| 2. Are check payments mailed directly to the Morale Fund Custodian for deposit to the morale fund? | YES | NO |
| 3. Are any goods obtained via commercial sponsorship inventoried by the commercial sponsorship representative and another designated individual at the time of delivery and recorded? | YES | NO |
| 4. Are commercially sponsored goods kept secure and accounted for as any other NAF inventory? | YES | NO |
|
IV. FILE DOCUMENTATION – A file should be kept on each commercial sponsorship initiative that is pursued. Does each file contain: | | |
| 1. The event or program sponsored? | YES | NO |
| 2. All solicitation documentation? | YES | NO |
| 3. Legal concurrence for agreement? | YES | NO |
| 4. Copy of agreement with both signatures? | YES | NO |

- | | | |
|------------------------------------------------------|-----|----|
| 5. Retail value of the sponsorship? | YES | NO |
| 6. Any internal MOA associated with the sponsorship? | YES | NO |
| 7. Publicity relating to the event? | YES | NO |
| 8. Copies of thank you letters? | YES | NO |
| 9. The after action report? | YES | NO |

Appendix T: Installation Report

The following is a sample report to assist you in tracking the financial success of your commercial sponsorship efforts.

Commercial Sponsorship
 Financial Tracking Form
 Fiscal Year 20XX



	Cash	Goods	Services	Equipment	Total
Solicited	_____	_____	_____	_____	_____
Unsolicited	_____	_____	_____	_____	_____
Unsolicited (Alcohol)	_____	_____	_____	_____	_____
Total	_____	_____	_____	_____	_____

Appendix U: Program Manager's Report

Name of event _____
Location of the event _____
Program/Event manager _____ Telephone _____
Date(s) event was held _____

1. Estimated number of people who attended: _____
2. Percentage of attendees who were military: _____
3. Specific activities that were unique to this event: _____

4. The location on the installation where the event was held: _____

5. A demographic description of the people who attended the event (age, ranks, married, dependents): _____

6. A listing of all VIPs and other high ranking military officials who attended or participated in the event: _____

7. Attachments: Overview of all internal evaluation forms, on-site photographs, video tapes, etc... _____

8. Thank-yous:

Who to Send	Name/Sponsor /Vendor/Other	Date Sent
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

9. Wrap-up Meeting Date: _____

10. Date Completed Final Report: _____

11. Event Feedback (The purpose of this feedback is to allow us to evaluate each project and make changes, additions, etc. for future events with its clients. Please include any helpful advice and/or solutions).

Pre-event planning, promotion, publicity:

(Was there enough time to plan? What could have been improved?)

Set-up:

(Was there sufficient time? Staff? Volunteers?)

Vendors:

(Did vendors perform as agreed? Were they on-time, professional, organized?)

On-site details:

(How did the event run? Was the installation pleased? Any glitches or problems?)

Additional comments:

Event/Project Goals

Goal 1: _____

Did you meet it? ___Yes ___No

How? _____

Goal 2: _____

Did you meet it? ___Yes ___No

How? _____

Goal 3: _____

Did you meet it? ___Yes ___No

How? _____

Personal Comments/Recommendations:

Appendix V: Marketing Report

Name of event _____
Location of the event _____
Marketing/PR manager _____ Telephone _____
Date(s) event was held _____

1. Number of news releases sent out: _____

2. Publicity Overview: List of all mediums used to publicize the event, along with reach and frequency numbers. For example, if press releases appeared in the base paper, we provided the circulation of the base papers and the number of time the release appeared. If flyers were distributed, we have provided the number distributed and a description of where and how they were handed out.

3. Media Coverage: Listed all television, print, and radio coverage this event or promotion received.

Attachments:

Copies of news releases sent out
Copies of media coverage (if available)
On-site photographs, video tapes, etc.

4. Thank-yous:

Who to Send	Name/Sponsor /Vendor/Other	Date Sent
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. Recommendations:

6. Event Feedback (The purpose of this feedback is to allow us to evaluate each

project and make changes, additions, etc. for future events with its clients. Please include any helpful advice and/or solutions).

Pre-event planning, promotion, publicity:

(Was there enough time to plan? What could have been improved?)

Set-up:

(Was there sufficient time? Staff? Volunteers?)

Vendors:

(Did vendors perform as agreed? Were they on-time, professional, organized?)

On-site details:

(How did the event run? Was the installation pleased? Any glitches or problems?)

Additional comments:

Event/Project Goals

Goal 1: _____

Did you meet it? ___ Yes ___ No

How? _____

Goal 2: _____

Did you meet it? ___ Yes ___ No

How? _____

Goal 3: _____

Did you meet it? ___ Yes ___ No

How? _____

Personal Comments/Recommendations:

Appendix W: Sponsorship Report

Name of event _____
Location of the event _____
Sponsorship manager _____ Telephone _____
Date(s) event was held _____

1. Number of sponsors involved: _____

2. Sponsors' names and involvement with event:

Name:	Sponsor of:	Value:
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Attachments:

Copies of news releases sent out
Copies of media coverage (if available)
On-site photographs, video tapes, etc.

3. Recommendations for next year:

4. Thank-yous:

Who to Send	Name/Sponsor /Vendor/Other	Date Sent
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. Final memento to sponsors:

Who to Send	Name/Sponsor /Vendor/Other	Date Sent
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

6. A listing of all VIPs and other sponsor representatives who attended or participated in the event:

Name:

Representing:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

7. Event Feedback (The purpose of this feedback is to allow us to evaluate each project and make changes, additions, etc. for future events with its clients. Please include any helpful advice and/or solutions).

Pre-event planning, promotion, publicity:

(Was there enough time to plan? What could have been improved?)

Set-up:

(Was there sufficient time? Staff? Volunteers?)

Vendors:

(Did vendors perform as agreed? Were they on-time, professional, organized?)

On-site details:

(How did the event run? Was the installation pleased? Any glitches or problems?)

Additional comments:

Event/Project Goals

Goal 1: _____

Did you meet it? ___ Yes ___ No

How? _____

Goal 2: _____

Did you meet it? ___ Yes ___ No

How? _____

Goal 3: _____
Did you meet it? ___ Yes ___ No
How? _____

Personal Comments/Recommendations:

Appendix X: External Evaluation Form

We at (installation) try to focus on excellence and customer service with our special events and promotions. Please take a minute to help us continue to improve by completing the following evaluation.

Event Name: _____ Date: _____

Using the scale of 5 “strongly disagree,” please rate us on the following statements:

	SA	A	U	D	SD
1. The overall event met my expectations.	5	4	3	2	1
2. The “your installation name here” staff was professional/courteous.	5	4	3	2	1
3. Event paperwork was concise and easy to understand.	5	4	3	2	1
4. Event billing was timely and simple to follow.	5	4	3	2	1
5. The on-site production crew managed details efficiently and professionally.	5	4	3	2	1
6. The sponsorship manager was easily accessible for my questions/changes.	5	4	3	2	1
7. Event wrap-up was completed in a timely manner.	5	4	3	2	1
8. I would work with “your installation name here” again on another event.	5	4	3	2	1

What I really liked about this event/promotion was: _____

Areas of improvement: _____

Additional comments: _____

Appendix Y: After-action Report

The following is a sample After-Action Report for the Coast Guard Academy Gus Macker 3-On-3 Basketball Tournament.

2004 Coast Guard Academy Gus Macker 3-on-3 Basketball Tournament

After Action Report

Prepared by:

Ms. Polly Summer

GUS MACKER OVERVIEW:

Hoosier Hoop Hysteria took over the Coast Guard Academy (CGA) on 10-11 June, 2004 as the Gus Macker 3-On-3 Basketball Tournament made its eighth appearance with us. Basketball players from all around came to the CGA in hopes of winning a "Gussy Award" to take home and impress their friends. As organizers of the tournament, the CGA MWR Office achieved the goals of having a basketball tournament that was:

- A wholesome, family oriented event.
- A major media sporting event.
- A value to our sponsors.
- An outstanding charity event for the community.
- Designed with the players in mind.
- An entertaining tournament for the spectators.

The 2004 Gus Macker Tournament was one of the largest on the national 70-city tour with over 1,705 teams, almost 7,000 players, and approximately 35,000 spectators. Once again, the CGA MWR Office coordinated the event with the help of sponsors and over 800 volunteers. These community organizations and volunteer groups dedicated many hours of their time and resources toward the tournament and helped make it the success it was.

SPONSORS:

Since 1999 when CGA MWR Office initiated the idea of bringing a basketball tournament to the CGA, the Macker has been the best game in town! The tournament has grown from 400 teams to over 1,700 and now, together with the valuable support of All Sports, Marsh, Q-95, Channel 8, Cameron Springs, and Methodist Sports Medicine our Office has been successful in creating a grassroots celebration of entertainment. New sponsors to the 2004 event include Markey's Audio Visual and Donatos Pizza.

CGA TOURNAMENT SPONSORS:

All Sport	Marsh	Q-95 Radio	Markey's Audio Visual
Cameron Springs	Donatos Pizza	Channel 8 TV	Wellness Sports Medicine

NATIONAL GUS MACKER SPONSORS:

Reebok	Above The Rim	Wilson Sporting Goods	Sport Court
--------	---------------	-----------------------	-------------

COURT SPONSORS:

Saturn of CGA	Bank One, New London
Ben & David Marlowe	Hurst Beans
Auto Tire Car Care	First Connecticut Bank

VOLUNTEER ORGANIZATIONS:

The Gus Macker Tournament relies heavily on the involvement of hundreds of volunteers. These dedicated individuals worked almost 2,400 hours to make the tournament the best in town. Volunteers are needed for all aspects of the tournament including set-up, registration, brackets, trash patrol, water patrol, and tear-down.

Several months prior to the tournament, proposals are sent out to interested volunteer groups. Many of the organizations have been involved for years and the Gus Macker organization has contributed more than \$175,000 to local charities over the past eight years.

ON-SITE EXHIBITORS

There were several on-site exhibitors at the 2004 outdoor tournament. They included Ameritech, Arthritis Foundation, CPN, and Guidemaster. Each of these exhibitors showcased their product or service and were provided a 10 x 10 tented area, tables, chairs, and ad space on the Gussette.

SPECIAL EVENTS:

The 2004 CGA Gus Macker 3-on-3 Basketball Tournament not only hosted basketball games for over 1700 teams, but provided four special events for the local "hot shots" to show their stuff. The special events included the Three-Point Shootout, a Free Throw Contest, the Long Distance Heave and the all-time favorite, the Slam Dunk Contest.

The Three-Point, Free Throw, and the Long Distance contests were held on the Sport Court Special Events Court. These events were held Saturday, 1000 – 1700 and Sunday, 0900 – 1400. The Slam Dunk contest was held at 1800 on Saturday evening on the Top Men's Court. Each of the Special Event winners received a trophy as well as other prizes ranging from cash to various sponsor merchandise.

PUBLICITY/PROMOTIONS:

Publicity for the tournament was generated through press releases, radio spots, and television spots. The following is the known coverage generated:

\$20,000 worth of air-time on sponsor Channel 8 WISH-TV, 30-second taped promotional spot, aired April 4 – May 11.

\$20,000 worth of air-time on sponsor Q-95 radio, 30-second taped promotional spots as well as scheduled and non-scheduled liners, aired April 4 – May 11, additional on-air mentions through June 11.

End aisle promotions in all central New London Marsh Supermarkets with 15,000 entry forms available at the information desks.

Entry forms available at Q-95, WISH-TV, New London Sporting Goods stores, City Center and the Community College Information Center.

Entry forms mailed to all past participants (8,000 players).

Various news releases sent out.

Production of 75 event posters displayed at Marsh Supermarkets and various sporting goods stores.

MEDIA COVERAGE:

The following list is the known media coverage that the tournament generated:

Print Coverage

CGA News Photo, Monday June 12.
New London – Page 2 article, May 8.
Listings in CGA Star calendar, weeks of May 28 and June 4.
Listings in CGA register, June calendar.
Photo and listing in June New London Monthly Magazine.
Calendar listing in NUVO Magazine, June 1 and June 8 issues.

Television Coverage

WRTV Channel 6: Saturday, June 10, 1800, mention on news.
WRTV Channel 6: Saturday, June 10, 2300, footage of game.
WISH Channel 8: Saturday, June 10, 1200, live weather broadcast.
WISH Channel 8: Saturday, June 10, 1800, footage on sports broadcast.
WISH Channel 8: Saturday, June 10, 2300, news.

ADDITIONAL SPONSOR RECOGNITION:

Title and media sponsor banners hung on mail stage, registration area, volunteer tent and top men's/women's courts.

Title and media sponsor logos on all basket sideboards (105 total).

Sponsor logos on player t-shirts (8,000 total).

PA announcements and 30 second spots played throughout the tournament.

Full page ad (10 x 18) in Gussette player newspaper sent to all players (7,000) and available on-site for distribution (3,000).

All Sport and Marsh coupon placed in all player packets (7,000).

Title sponsor logo on front and back cover of 25,000 entry forms.

Cameron Springs t-shirts worn by 200 volunteers and All Sports t-shirts worn by 300 volunteers.

Marsh and All Sport inflatables displayed on-site June 10-11.

Eighth Annual Outdoor Coast Guard Academy Gus Macker Fact Sheet

Who: Gus Macker is back at the Coast Guard Academy (CGA) for its annual summer appearance. In 1999 Gus Macker visited the CGA for the first time. This annual hoop fest has grown to 2000 teams, 8000 players and an estimated 30,000 spectators.

Why: To bring a wholesome, athletic, family oriented event to the Coast Guard Family at the CGA.

What: 3-on-3 Basketball at its best. Teams of 4 compete in various divisions to win a coveted "Gussy" Award. First, second, third, and sportsmanship awards are given in each division. Various special events conducted on site throughout the contest including 3 point, free throw, longest shot and the famous slam dunk. Prizes awarded to all winners.

When: June 10-11, 2004

1600-1900, Friday, Registration

0700-1200, Saturday, Registration

0800, Saturday, Opening Ceremonies

0830, Saturday, Games and Special Events

1800, Saturday, Slam Dunk Contest

0800-1700, Sunday, Games and Special Events

Where: CGA sports facility in New London, CT

How to Enter: Entry forms are available at New London Marsh Supermarkets, City Center, Q-95, and the State Fairgrounds. Entry deadline is May 10. Tournament limited to first 2000 entries. No late teams accepted. Mail entry forms to:

ATTN: MWR Director
(Gus Macker Tournament)
US Coast Guard Academy
15 Mohegan Avenue
New London, CT 06320

Appendix Z: Thank-you Letter

The following is a sample Thank-you Letter.

**U.S. Department of
Homeland Security**

**United States
Coast Guard**



Commandant
United States Coast Guard
Office of Exchange and Morale

870 Greenbrier Circle
Tower II – Suite 502
Chesapeake, VA 23320-2681
Staff Symbol: (G-WPX)
Phone: (757) 420-2480
Fax: (757) 420-0569
Email: RDavis@gwpix.uscg.mil

1710
December 23, 2004

Mr. Jim Brown
President, XYZ Company
2665 Junction Road
Cambridge, MA 12345

Dear Mr. Brown:

On behalf of the U. S. Coast Guard, I would like to our sincere appreciation for XYZ Company's generous support of the 2004 Coast Guard Sport Event. You and your staff may take pride in knowing that this athletic event was an enjoyable pastime for many active duty Coast Guard members at the United States Coast Guard Academy. Your continued commitment and interest in supporting the Coast Guard Morale, Well-Being, and Recreation program is appreciated.

I look forward to working with you on the future public relations and at the same time take care of those who protect and defend.

Semper Paratus!

Sincerely,

I. M. SAILOR
Captain, U.S. Coast Guard
Chief, Office of Exchange and Morale
By direction