



Yale SCHOOL OF MANAGEMENT

## **CORPORATE AND FOUNDATION RELATIONS**

### **Corporate Sponsorship Information**

# CORPORATE SPONSORSHIP GUIDELINES

## Starting the Corporate Sponsorship process:

- Begin planning at least 6 months in advance
- Meet with AASL to review event and discuss funding needs
- Develop sponsorship materials and prospect list
- Contact SOM CFR Office for approval of prospect list and solicitation materials, copying AASL

## Sponsorship Information:

Sponsorship materials vary depending upon the event/project, and materials may include a cover letter, proposal/project description, sponsorship benefits, and budget. In the materials describe event/project: topic/purpose, place, date, keynote speaker, and number of attendees expected. It is also helpful to explain why funds are needed.

It is important to describe why this is a good opportunity for the company: interaction with students; recruitment possibility; heightened on-campus awareness; intersects with corporate need, interest or marketing objective. Depending upon the event, you can offer a company sponsorship benefits which include recognition in promotional materials; recognition on site at event; opportunities to participate – including sending representatives or distributing corporate materials.

## Prospecting:

To research and identify potential corporate sponsors, use a variety of search methods including online databases such as Hoover's and the Foundation Center's Foundation Directory Online that can be accessed through the Yale University Library, corporate websites, and analyzing funders of peer student clubs.

- Proquest/Hoover's
- Foundation Center
- Guidestar

## Developing the Prospect List:

- Identify companies/organizations that:
  - Supported your club in the past
  - Are industry related
  - Recruit at SOM
  - Have alumni contact
  - Have corporate interest in topic, even if it is not the primary business of the company
  - Fund similar clubs at other business schools, or similar programs in the field

**All prospect lists and sponsorship materials must be approved by the Yale SOM CFR office before any solicitations can happen, and solicitation of SOM and Yale alumni as individuals is not permitted. Allow one week for review of prospect lists and proposals.**

## Solicitation and Stewardship:

- Mass mailings rarely work – make contacts and personalize solicitations
- Thank the donor upon receipt of commitment
- Involve in event and keep informed of progress
- Acknowledge at event
- Send letter after the event thanking for sponsorship support and providing short recap of success of event
- Send copies of all correspondence to CFR Office

Yale SOM CFR Contact Information:

Adrienne Gallagher

Director of Institutional Partnerships

Email: [adrienne.gallagher@yale.edu](mailto:adrienne.gallagher@yale.edu)

Phone: 203-432-0207

# SAMPLE TIMELINE

## **6 Months prior to Event**

Meet with AASL to review event; Develop a list of potential sponsors; Draft conference solicitation letter and proposal; Determine sponsorship levels/benefits; Review materials with AASL.

## **6 Months prior to Event**

Forward sponsorship materials and prospect list to CFR office to review solicitation plan and receive approval; Allow one week for review of materials; All prospect lists must be approved by the CFR office

## **5 Months prior to Event**

Solicit Sponsors (*Remember – you must send the Prospect List and the Solicitation Letter drafts to the CFR office for approval*)

## **4 Months prior to Event**

Follow-up solicitations and confirm participation

## **2-3 Months prior to Event**

Work with Corporate Sponsors on delivery of benefits, including how they want their name listed on materials; securing high definition company logo for publication use; confirming their conference attendance; and invoicing for payment (sample template attached).

## **1 Month prior to Event**

Finalize list of sponsors; Continue following up with payments and delivery of benefits

## **Day of Event**

Ensure all “day of” benefits are fulfilled; Act as Event contact for sponsor companies, etc.

## **2 Weeks post-Event**

Send Thank You Note to Sponsors with brief report on success of event (with copies to the CFR Office); Follow up on unpaid commitments

# SOLICITATION LETTER OUTLINE

1. **Introduction of your organization and project as a part of the Yale School of Management**
  - *i.e. "On behalf of the students, faculty, and staff at the Yale School of Management and the (conference name), we would like to request your important participation as a sponsor of this year's conference. This student-run conference will be held at Yale on (date). The program's purpose/theme for this year is...."*
2. **Specific details on what you are asking for and how the donation money will be used for the objectives of the club/conference and the project/event.**
  - *i.e. "We are asking (company name) for a sponsorship contribution of \$XX,XXX. As a sponsor, you will be included in all of our conference publications and signage as well as our website (include website address)."*
3. **Explain why this is a good opportunity for the corporation**
  - Interaction with students
  - Recruitment possibility
  - Heightened on-campus awareness
4. **Call to action**
  - *i.e. "Thank you for your consideration. One of our committee members (give specific name) will be in touch with you next week. If you have any questions in the meantime please call..."*

**The SOM CFR Office must approve all solicitation letters/proposals and prospect lists.**

# SAMPLE SOLICITATION LETTER

DATE

NAME

TITLE

COMPANY

ADDRESS

CITY, STATE ZIP

Dear NAME:

As chair of the 2010 Yale XYZ Conference, I am writing to request COMPANY's important participation in this year's conference at the Yale School of Management. The Yale XYZ Conference will focus on THEME/TITLE and will be held on DATE at LOCATION.

Building upon the success of last year's Conference, the 2010 Conference will explore SHORT CONFERENCE DESCRIPTION. We expect over 100 Yale students, alumni and members of the BUSINESS community to participate either as speakers or attendees. Our keynote speaker will be NAME, TITLE of COMPANY.

It is our pleasure to invite COMPANY to be a sponsor of this dynamic conference with a \$X,XXX contribution. As a sponsor at the LEVEL level, your company would receive visibility among the Yale and BUSINESS community through inclusion of COMPANY's name and logo on all Conference promotional materials and recognition at the event.

I have attached a brief description of the XYZ Conference for your review, as well as a list of the sponsorship opportunities available and the benefits associated with each level. I will contact you next week to discuss this opportunity in greater detail. In the meantime, if you have any questions, please feel free to contact me at PHONE or EMAIL.

We would be honored to have COMPANY support the 2010 XYZ Conference as a LEVEL Sponsor. On behalf of the Yale School of Management and the XYZ Conference Planning Committee, I thank you for your time and consideration.

Sincerely,

NAME

TITLE

CONFERENCE NAME/STUDENT CLUB

PHONE

EMAIL

WEBSITE

# SAMPLE SPONSORSHIP LEVELS

## Yale School of Management

### 2010 XYZ Conference

#### **EVENT TITLE**

## SPONSORSHIP OPPORTUNITIES

**Short event description**, including topic, date, location. Description of event topic and activities, keynote speakers/panelist/special guests. Anticipated number of attendees and constituencies represented (i.e.: students, distinguished academics, policy-makers and practitioners).

With a mission to educate leaders for business and society, the Yale School of Management is revolutionizing management education. By supporting the conference, sponsors will have the opportunity to develop a relationship with Yale SOM and gain visibility among SOM's students and faculty. We will work closely with you to develop a sponsorship package that meets your corporate marketing objectives.

#### PLATINUM ≈ \$ 10,000

- Verbal recognition during conference opening and closing remarks
- Corporate signage at event
- Opportunity for company speakers to participate in conference panels (as available)
- Opportunity to invite up to ten corporate guests to the conference
- Opportunity to set up company information table
- Prominent company name and logo display in all marketing and day-of-event materials including brochures, mailers, emails, etc.
- Full page corporate display in conference brochure
- Prominent display of company name and logo on conference website
- Prominent display of company logo on conference sponsorship banner
- Opportunity to send promotional materials to be handed out to attendees

#### GOLD ≈ \$ 5,000

- Verbal recognition during conference opening and closing remarks
- Corporate signage at event
- Opportunity for a company speaker to participate in a conference panel (as available)
- Opportunity to invite up to five corporate guests to the conference
- Preferred display of company name and logo in marketing and day-of-event materials including brochures, mailers, emails, etc.
- Half-page corporate display in conference brochure
- Preferred display of company name and logo on conference website
- Preferred display of company logo on conference sponsorship banner
- Opportunity to send promotional materials to be handed out to attendees

#### SILVER ≈ \$ 2,500

- Verbal recognition during conference opening and closing remarks
- Corporate signage at event
- Opportunity to invite up to three corporate guests to the conference
- Display of company name and logo in marketing and day-of-event materials including brochures, mailers, emails, etc.

- Quarter-page corporate display in conference brochure
- Display of company name and logo on conference website
- Display of company logo on conference sponsorship banner
- Opportunity to send promotional materials to be handed out to attendees

To market the conference we plan on sending promotional materials to approximately **NUMBER** area business leaders and Yale SOM alumni. In addition, all communications will be sent to the more than **NUMBER** Yale SOM students and faculty members.

#### **Student Club Description**

#### ***Information:***

For more information regarding sponsorship or the conference in general, please contact:

**NAME**

**TITLE**

**CONFERENCE NAME/STUDENT CLUB**

**PHONE**

**EMAIL**

**WEBSITE**



# SAMPLE SHORT PROPOSAL



## Yale SCHOOL OF MANAGEMENT

### WOMEN IN MANAGEMENT

#### *Navigating the Path Ahead: Strategies for Finding a Work/Life Balance That's Right for You*

On February 23, 2007, the Women in Management student club of the Yale School of Management (SOM) will present *Navigating the Path Ahead: Strategies for Finding a Work/Life Balance That's Right for You*, a half-day symposium held at the Quinnipiack Club in New Haven, CT.

The program will allow the more than 50 participants to take a morning to put work and studies aside, sit down with members of the SOM community (students, alumni and faculty), and talk about the wonderful and challenging realities of composing a full, meaningful life while tackling the demands that come with being a busy professional.

The agenda for the program includes a keynote presentation and two panel sessions. Connie Gersick, Visiting Scholar in Organizational Behavior at SOM, will give the opening keynote speech that will be followed by an interactive discussion. Connie studies the strategies used by professionals to create balance in their lives and received her Ph.D. from Yale University. The two panels, moderated by Amy Wrzesniewski, Associate Professor of Organizational Behavior at SOM, will feature SOM alumni who will offer their perspectives as busy professionals, active volunteers, spouses/partners, and parents. The panelists will speak honestly about their approach to negotiating the terrain of work, home, and life on a daily basis. Through these discussions attendees will learn practical strategies that they can apply to their lifestyle and achieve work/life balance throughout their career.

The Women in Management club will promote this event to the entire SOM community and SOM students will be encouraged to attend. The sponsor will be recognized at the event and in the marketing for the symposium, which will include announcements in SOM student, faculty and staff e-newsletters and on the SOM website.

The Women in Management (WIM) student club was founded as a means to unite women in the SOM community. WIM builds networks and hosts events to cultivate the professional, academic, and social interests of women in business. Through these activities, WIM addresses many of the challenges that women in management face, and creates opportunities for women to develop a network of business mentors and contacts in the Yale community and in industries across sectors.

# **SAMPLE SPONSORSHIP BUDGET**

**Yale School of Management**

**2010 XYZ Conference**

***EVENT TITLE***

## **BUDGET**

### **EXPENSES**

Operations

Facility Rental

Projection/Sound systems

Equipment

Marketing/Advertising

Flyers

Banners

Posters

Conference brochure/materials

Speakers

Travel

Lodging

Catering and Beverages

Supplies

Conference supplies, i.e.: name badges

Gifts

Phone

Postage

Other Expenses

### **TOTAL EXPENSES:**

### **INCOME**

Registration Fees

Yale SOM Student Government

Sponsorship Commitments Received

### **TOTAL INCOME:**

Request to **COMPANY**

# PROSPECT TRACKING SHEET

[illegible]



# Yale SCHOOL OF MANAGEMENT

PO Box 208200  
New Haven CT 06520-8200

*courier*  
135 Prospect Street  
New Haven CT 06511

*mba.yale.edu*

## INVOICE

DATE

Contact Information

Company

Address

City, State Zip

**Event:**

**Sponsorship Amount:** \$XXX

**Event Date:**

Please make check payable to **Yale University**. Please include a copy of this invoice with your contribution and/or write the event name in the memo portion of the check.

Mail to: Adrienne Gallagher  
Director of Institutional Partnerships  
Yale School of Management  
P.O. Box 208200  
New Haven, CT 06520-8200  
(203) 432-0207  
adrienne.gallagher@yale.edu

Yale University Federal Employer Identification Number: 06-0646973

# THANK YOU TEMPLATE

## **Template for a formal thank you letter on Yale SOM/or Student Club Letterhead**

[Date]

[Contact Name]

[Sponsor's Address]

Dear Mr./Ms. [last name]:

It is with great pleasure that I write to thank [Organization Name] for its generous contribution of \$X,XXX in support of ABC Club's [Title of Event] at the Yale School of Management on [Date]. [Acknowledge any non-financial participation – program content development, sponsor's introduction/kick-off of event, connections made to others in the industry, involvement in getting other organizations/individuals to participate]. Because of your support, the event was quite a success!

Briefly describe event and successful achievements:

- Goals achieved
- Number of student participants/overall attendees
- Convey the tenor of the event – i.e. creating buzz, electric, thoughtful, exciting
- Share any specifics from the event – the conference provided an important forum to discuss global warming...with leading experts...
- How event's impact may benefit the sponsor – i.e. newfound interest in sponsor's firm or industry]
- Provide information on how and where the company was recognized, and who they reached – included on website, email newsletters reaching 200 people, posters, etc.

[If necessary: I've attached an invoice...]

On behalf of the members of the Yale SOM ABC Club, we truly appreciate your support for our mission to enable students and professionals to create positive social change through business. We look forward to continuing this important partnership between XXX and the SOM ABC Club.

Sincerely,

[Name of Event Chair/Club Leader, SOM Class Year]