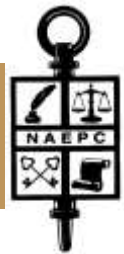


Learning Pod Notes



Creating a Sponsorship Program

Who uses a sponsorship program? Most people didn't raise hands.

Sponsorship opportunities for monthly luncheons, breakfasts, website, annual awards banquet.

Sponsorships for each meeting (breakfast / dinner) and they get 5 minutes to talk at beginning of meeting and to pass out marketing materials.

In order to address sponsorship, need to figure out council goal first. Are you looking for money for higher level speakers? What are you looking to accomplish? If you don't want to raise money, you might need to cut expenses.

Recruitment is easier when you can tout the programs you've had. Quality of programs are important.

If you're putting together a sponsor committee for your council, that's a best practice.

Look at sister councils on website – oftentimes there are sponsorship packages in their paperwork so you can see what others are charging.

\$1000 for dinner – 65-80 people
\$500 for breakfast – 40-45 people

\$4,000 for gold sponsors – singular promotion for event, introduce speaker, 5-minute talk
\$1,000 for silver sponsors – for the whole year

Reach out to members for sponsorship opportunities. They're trying to diversify and not have the same people sponsorship.

\$2500 for gold.

\$900 lunch sponsor
\$500 breakfast sponsor
\$85/year for dues,

Finding that it's the banks and non-profits that have the budget to pay the sponsorship, but not the sole practitioners.

For profit segment and a nonprofit segment – level of sponsorship

Council Leadership Day – November 6, 2018
55th Annual NAEPC Advanced Estate Planning Strategies Conference

Could also split sponsorship.

Sponsors don't talk at meeting – they get to pick dessert.

Several of the councils are using NAEPC website, but a lot were not. Averett recommended using the NAEPC website. That was her councils first connection to sponsorship. It makes a sponsorship program and administering a council that much easier.

Do councils have sponsorship policies and procedures as well as an application for people? Several councils said it's on the website.

Sponsor minute. They get one minute to talk. People also like the sponsor gadgets, so ask sponsors to bring their gadgets.

Once you retain a sponsor, how do you follow-up with them? Do you make follow up calls, how do you keep them coming back?

Put program together and contact last years' sponsor, giving them the first right of refusal. For the most part., they re-up. A lot of sponsorships come from personal asks. And the person asking will then f/up. Sponsorships can change regularly, depending on who is on the board.

Not a bad problem to have people applying that don't qualify. One council has Junior Members to help with that.

Social media spotlight of sponsors

Sponsor Benefits:

- Bring speaker
- Sponsor gets 5 minutes at podium

Social Sponsor - \$1,500 – bring 4 guests, host, provide a marketing piece

Tulsa EPC - Annual meeting sponsors, sponsors for each meeting, business partners that can subscribe so they can send someone to meetings (rather than membership), placemat sponsors (different pricing for placement on placemat), sponsorship for website, sponsorships on screen before presentations, and a lot of competition for those positions. Business meeting sponsors are very popular – they get to send someone to each of the meetings, it has provided enough liquidity to the organization that they're able to have national speakers. They have 4 paid speakers from out of town (out of the 8 meetings).

TX EPC - Just recently started doing sponsorships. They shied away in the past. Breakfast / lunch.

Central AZ EPC - Dinner sponsors (\$3000), 4-hour lunch CE that is an ice cream social (\$2000 x 2), holiday event, spring social, dinner wine sponsor with table tents, emerging professionals' sponsorships that support scholarships for membership, AEP dinner sponsorships (two per year).

Birmingham EPC – Sponsorships are dominated by board member companies. Gold (\$3,000 – they get to speak at one of the meetings) and silver level. They put a sign out front with sponsor logos.

EPC of Naples – They don't do any sponsorship. They use to, but they're revisiting it now. Trying to figure out how to balance sponsorship with the needs/wants of the membership.

Washington, DC EPC – They tried sponsorship in the past few years. Golf tournament – sponsor each hole (\$500/hole) and dinner meetings, sponsored by a trust company, etc. with 3 minutes to speak and a table near the door.

Central Philadelphia EPC – Dinner meeting sponsors, printed directory with ads (that then pays for the website), most sponsors are non-profits.

Other non-dues revenue that's not sponsorship

Make money on guest fees

Golf event

Events (go to games, etc.)