



*Rachel*  
**MUIR**

**GETTING CORPORATE &  
FOUNDATION GIFTS**

September 26, 2023 Qgiv



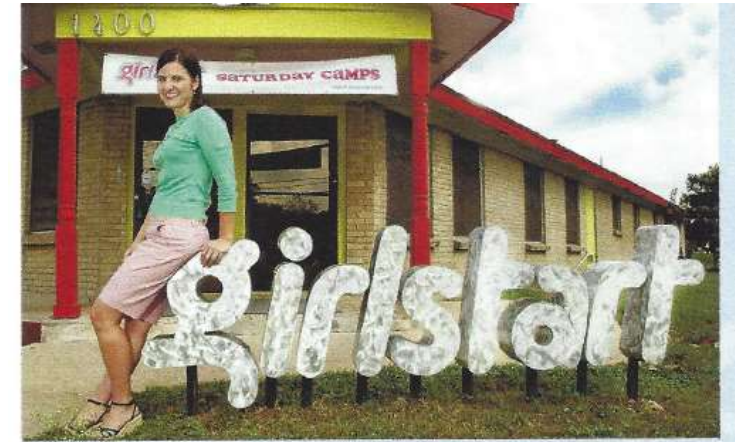
# Rachel Muir, CFRE

- Founder: Girlstart
- Featured on: Oprah,
- CNN, the Today Show
- AFP Outstanding Fundraiser of the Year
- What Rachel does: custom training, board retreats, online classes
- Weaknesses: chips, queso



@rachelmuir

www.rachelmuir.com

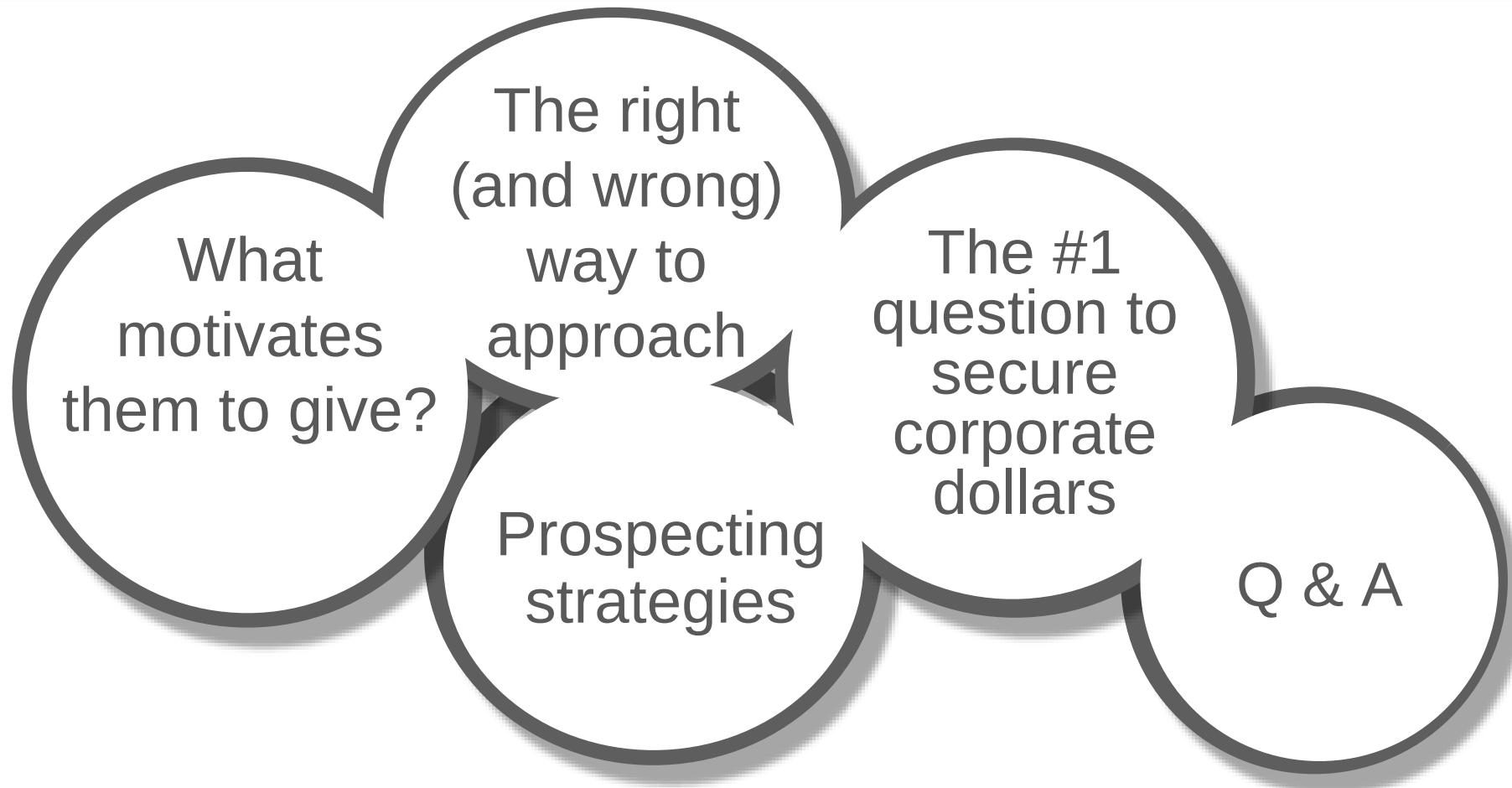


Type questions into Q/A box

Chat into chat box

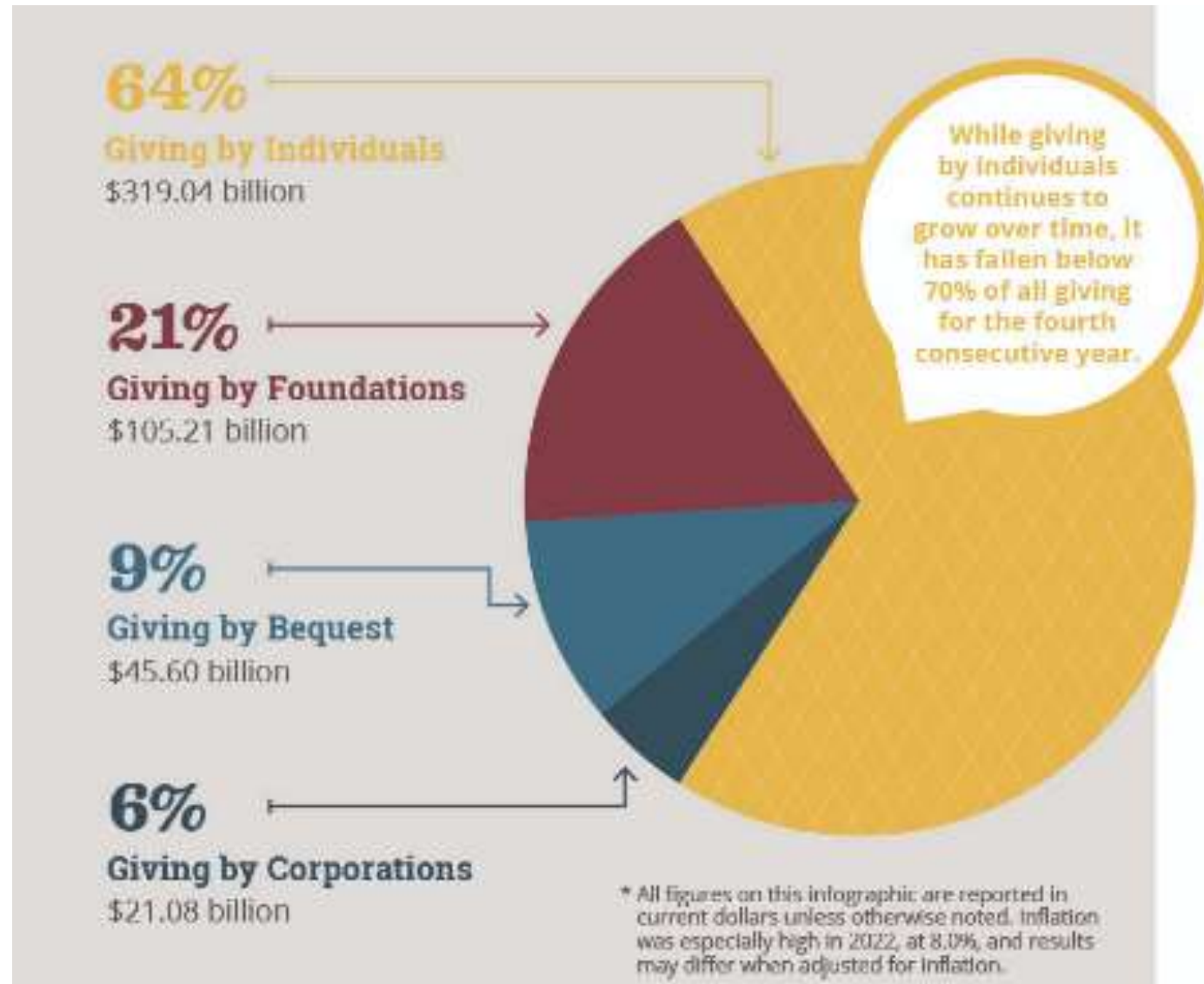


Slides -> [RachelMuir.com/handouts](https://RachelMuir.com/handouts)



Getting Corporate & Foundation Gifts

# Where's the money?



That's 21 billion dollars! →

A close-up photograph of a hand raised in the foreground, with several other hands raised in the background, all against a green chalkboard background. The text "Let's get to know you..." is overlaid in white on the right side of the image.

**Let's get to know you...**

# How would you describe your corporate sponsorships?

- 1) Nonexistent
- 2) Thriving
- 3) Want more
- 4) Feeling taken advantage of!



**Building relationships is  
not optional in fundraising.**

**It's what fundraising is.**

**To be a good partner you  
must know what is wanted  
out of the relationship**





# The myth of entitlement



## Corporations

- In business to make money for their shareholders (not be philanthropic)
- Regardless of size, goal is making a profit



## Foundations



- In business to give away money
- Must give away money to maintain their tax exempt status

# What Motivates Corporations to Give?

## Exposure/PR

- Corporate social responsibility
- You offer exposure to target customer
- Media

## You benefit them

- Economic benefit (jobs, programs)
- Employee benefit (childcare or employee engagement)

## Relationships

- C-suite has relationship w/you
- Employees serve on your board
- You are their target customer

# Corp sponsorship vs. Corp & Foundation Grants



## Sponsorship

- What's in it for me? Benefit intent
- Media exposure, pr, employee engagement, access/ exposure to target audience



## Grants



- Project meets guidelines
- Philanthropic intent



## Types of corporate support

- Cash gifts (and matched gifts)
- Event sponsorship
- Gifts in-kind
- Volunteer support
- Workplace giving
- Grants
- Program sponsorship

# One company, many doors

One organization got a grant through a bank's foundation, an event sponsorship through a local branch, employee giving through a United Way workplace giving campaign and an individual major gift from a bank officer in the C-suite.

Source: [Raise More Money From Your Business Community](#), Linda Lysakowski



# Opportunities with Corporations



# Opportunities to partner w/local businesses

- Board service or committee service
- Group volunteer projects
- In kind gifts
- Executive “on loan”
- Matching gifts
- Chaperone email

# How to Find Corporate Prospects







## 6 Prospecting Strategies

- Read (and subscribe to) your local business journal and their book of lists (esp. top employers)
- Look at the member listing for your local chamber of commerce
- Join your local chamber, their leadership program or professional clubs (i.e. business breakfast club)
- Ask your board members who they do business with and brainstorm contacts
- Look at the donor lists for other nonprofits
- Hang out where they hang out

# Real world example

## “Breakfast Under the Stars”

One girls in STEM organization that had a portable planetarium invited business leaders to learn more about their work in a “Breakfast Under the Stars” event.

After a brief show and breakfast with a short welcome from the ED and testimonial from a student, business leaders were given a one-page fact sheet and invitation to become a corporate sponsor or “star” of the organization.



# The right (and wrong) way to approach them



## Wrong Way

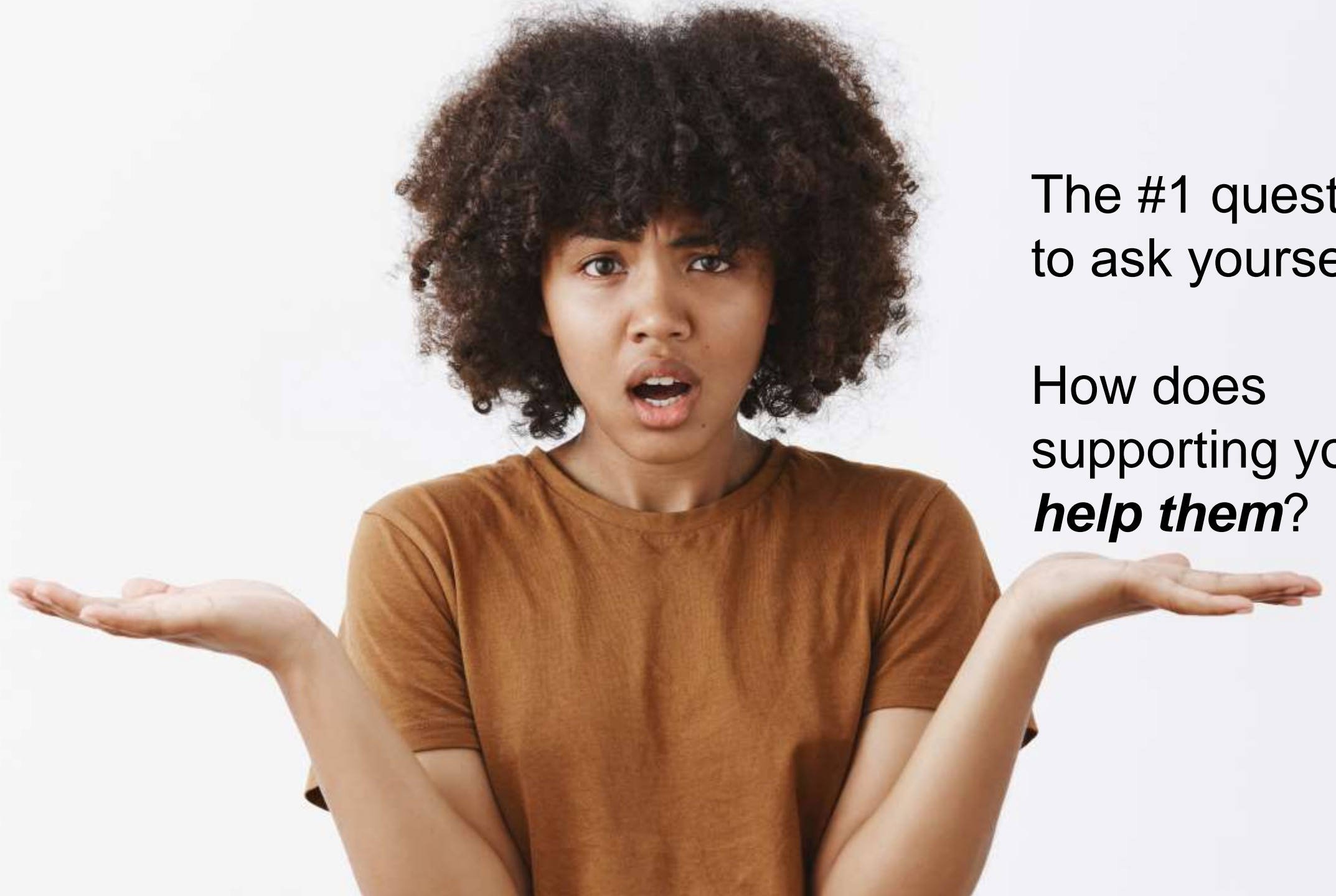
- Idea 'being a great cause' is enough (sponsorship ≠ philanthropy)
- Not doing your homework on them or understanding "WIIFM"
- Not making the unique case for *your* organization
- Not respecting their time or having clear goals & limits



## Right Way



- Researching what they fund
- Learning and probing what they want
- Offering the benefits they want that only you can give them
- Exploring expectations and setting boundaries



The #1 question  
to ask yourself...

How does  
supporting you  
***help them?***



“Hi, my name is  
\_\_\_\_\_.”

I may have assumed corporations \*should\* fund me in the past to be a “good community partner”.

Today I’m choosing to not make assumptions.

Today I’m choosing to learn what they want.”

# What to ask prospective sponsors

- What do they fund? What has worked well in the past?
- What do they value? What motivates them?
- How does our work help them (economic benefit, safer community, or qualified job candidates)?
- Does our work help their employees (childcare, employee morale boost through volunteering)?
- Who is their target audience? Can we offer access to them?



# Real world examples

## “Street smart”

UK charity that raises millions over the holidays by having a card on participating restaurant tables adding a voluntary donation (1 pound) to the bill to support homeless charities.

In 5 years only 1% of customers decide not to give and many ask to give more.





**GET CLEAR ON YOUR “DEALBREAKERS”**



# 8 Sample Dealbreakers

- 1) In-kind donations – old computers, lead-based paint, expired food, live animals, real estate etc.
- 2) Volunteers - accommodating 300 at once
- 3) Program restrictions – limiting participants
- 4) Naming opportunity – set terms and expiration
- 5) Media opportunity – discuss expectations/limits
- 6) Product endorsement or sales / Exclusivity
- 7) “Buying silence” of potential critics
- 8) Privacy – email list etc



# Avoiding ethical dilemmas

Discuss dealbreakers

Download a Gift Acceptance Policy

Have Board Approve it

Get free samples at

[www.CouncilofNonprofits.org](http://www.CouncilofNonprofits.org)



# Sample Gift Acceptance Policies

## 1) Gifts Generally Accepted Without Review—

- a) *Cash*. Cash gifts are acceptable in any form, including by check, money order, credit card, or on-line. Credit card donations must currently be made on-line.
- b) *Marketable Securities*. Marketable securities may be transferred electronically to an account maintained at one or more brokerage firms or delivered physically with the transferor's endorsement or signed stock power (with appropriate signature guarantees) attached. All marketable securities will be sold promptly upon receipt unless otherwise directed by xxx's Board of Directors. In some cases marketable securities may be restricted, for example, by applicable securities laws or the terms of the proposed gift; in such instances the decision whether to accept the restricted securities shall be made by xxx's Board of Directors.
- c) *Bequests and Beneficiary Designations under Revocable Trusts, Life Insurance Policies, Commercial Annuities and Retirement Plans*. Donors are encouraged to make bequests to xxx under their wills, and to name xxx as the beneficiary under trusts, life insurance policies, commercial annuities and retirement plans.
- d) *Charitable Remainder Trusts*. xxx will accept designation as a remainder beneficiary of charitable remainder trusts.
- e) *Charitable Lead Trusts*. xxx will accept designation as an income beneficiary of charitable lead trusts.

Go to:  
[councilofnonprofits.org](http://councilofnonprofits.org)  
Search for  
“gift acceptance  
policies”

# Sample Gift Acceptance Policies

- 2) **Gifts Accepted Subject to Prior Review**—Certain forms of gifts or donated properties may be subject to review prior to acceptance. Examples of gifts subject to prior review include, but are not limited to:
- a) *Tangible Personal Property*. The Board shall review and determine whether to accept any gifts of tangible personal property with a Fair Market Value greater than \$5,000 in light of the following considerations: does the property further the organization’s mission? Is the property marketable? Are there any unacceptable restrictions imposed on the property? Are there any carrying costs for the property for which the organization may be responsible? Is the title/provenance of the property clear?
  - b) *Life Insurance*. xxx will accept gifts of life insurance where xxx is named as both beneficiary and irrevocable owner of the insurance policy. The donor must agree to pay, before due, any future premium payments owing on the policy.
  - c) *Real Estate*. All gifts of real estate are subject to review by xxx’s Board of Directors. Prior to acceptance of any gift of real estate, xxx shall require a survey and an initial environmental review by a qualified environmental firm at the donor’s expense, unless the Board votes to specifically waive this requirement. In the event that the initial review reveals a potential problem, the organization may retain a qualified environmental firm to conduct an environmental audit. Criteria for acceptance of gifts of real estate include: Is the property useful for the organization’s purposes? Is the property readily marketable? Are there covenants, conditions, restrictions, reservations,

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# Sample Gift Acceptance Policies

## Sponsorship and Donor Guidelines

BIO Girls welcomes sponsorship and donors in support of its organizational efforts subject to the following guidelines:

- BIO Girls will not accept sponsorship that reflects in a negative manner on the organization, does not align with its mission statement, or is not in the best interest of the health and safety of the organization as determined by decision-making parties listed below.
- BIO Girls works with children. Therefore, we do not accept sponsorships for certain categories of products and services, including but not limited to:
  1. Alcohol products
  2. Illegal drugs and drug paraphernalia
  3. Weapons
  4. Tobacco products or establishments
  5. Sexual escort services
  6. Gambling opportunities or casinos
  7. Weight-loss products or plans
  8. Plastic surgery or body augmentation
  9. Adult Novelty Products and Services



<https://www.biogirls.org/gift-acceptance-policy>

BIO Girls must retain control over any sponsored program and sponsors should not have any input into operational matters relating to a project they have sponsored.

# Sample Gift Acceptance Policies

This policy is not applicable to philanthropic contributions, grants, or unsolicited donations in which no benefits are granted to the sponsor and where no business relationship exists.

Sponsor or donor does not receive any special program benefits, priority treatment or governance over BIO Girls programming.

BIO Girls reserves the right to determine appropriateness of linking to the Sponsor or Donor from the BIO Girls web and social media properties. If sponsor or donor website includes any of the following either implicitly or explicitly, acknowledgement will be made but a link back to the sponsor/donor site will be prohibited:

- Sex, Sexual Products, Sexual Enhancements
- Nudity or partial nudity
- Alcohol or street drugs
- Weapons
- Gambling



<https://www.biogirls.org/gift-acceptance-policy>

## **No Endorsement**

BIO Girls, by accepting a sponsorship or donation, is not giving an implied or real endorsement of that donor. All public communications regarding philanthropic engagements are subject to prior agreement by BIO Girls and the donor. No third-party entity, including a corporation, may use BIO Girls name and/or trademarks without explicit written permission.

## **Right to Terminate**

BIO Girls retains the right to terminate a philanthropic engagement for reasons relating to actual or potential reputational harm or legal compliance, breach of an agreement, and misuse of BIO Girls intellectual property including its name or brand.

## **Gift Acceptance Review**

BIO Girls' Board of Directors will convene as needed to review and make determinations regarding a potential gift(s). BIO Girls reserves the right to refuse any gift it believes is not in the best interest of the organization. All decisions to solicit and/or accept potentially controversial gifts will be made by the Board of Directors.

# Be clear & transparent

Explore unwritten expectations around:

Exposure (media, logo placement or to club's constituency)

Intellectual property (each entity should be able to approve press release, logo use, descriptions etc)



# Good fit or bad fit for children's science museum?

## Company A: Target \$25,000 sponsorship



## Company B: Bioworx having employee event

- Free admission to non-members every Tuesday in August Door prizes (gift cards, school supplies)
- Logo visibility at museum, in email ads & social media
- Chaperoned email send from Target

- Wants staff to come, set up a booth and do fun science activities
- Bioworx thinks employees might get excited to volunteer, enroll kids or give
- Allowed to have tip jar at booth



# Is there mutual gain? Org vs Corp Needs

## Your needs

- Safety
- Social responsibility
- Integrity
- Reputation
- A partner that shares your values



## Their needs

- Reputation
- Employee morale
- Audience exposure
- Responsible reporting and budgeting

# Tips to identify & create sponsor benefits



Break each event, program & opportunities into 'properties' to sell

Identify assets within each 'property' i.e. logo placement, speaking opportunities, free tickets etc.

Brainstorm non-traditional opportunities with key staff

Ask current & past sponsors what they want to see as part of their package or what they wished they'd had more of

# Sample Sponsorship Assets

- Booths /exhibit space
- Tables / tent cards
- Product placement
- Logo placement
- Speaking opportunities
- Free tickets / VIP tickets
- Name tag sponsor
- Dinner sponsor / happy hour sponsor /wine sponsor
- Full page ad in program



# The Sponsorship Package

One package per “property” (aka event, opportunity or program)

List assets & associated value of each

Think menu (not “Gold, Silver, Bronze”)

Mark your proposal “draft”

Tell sponsors you are building a tailored package based on their interests

Let your sponsors identify what works best for them

Source: Chris Bayliss, The Sponsorship Collective



# Lifecycle of Corporate Sponsorship



Source: Chris Bayliss, The Sponsorship Collective





No type of  
fundraising is  
free

# Every Strategy Involves Relationships

## Individuals

- Direct response (direct mail & email)
- Events (peer to peer)
- Major gifts
- Monthly gifts
- Planned gifts
- Capital campaigns
- Canvassing (door to door or face to face)
- Telemarketing
- DRTV & traditional media: radio & print ads
- Print newsletter
- Matching gifts
- Board gifts
- Social (Facebook, crowdfunding, peer to peer)

## Corporate

- Sponsorship
- Match (corporate match and/or match employee gift)
- In-kind
- Grants

Requires relationship with CEO, Marketing Dept or Community Affairs Dept

## Grants

- Government
- Private Foundation
- Community Foundation

Requires relationship with program officers

# Let's talk foundations...

An entity that supports charitable activities by making grants to unrelated organizations or institutions or to individuals for scientific, educational, cultural, religious, or other charitable purposes.





# How are (private) foundations structured?

They...

- Make grants
- Get their support from a single individual, family or corporation
- Typically don't engage in fundraising
- Are governed by their board (or funder) and/or family members or others chosen by them to serve



Do they *\*have\** to give away money? Yes!

Each year every private foundation must make eligible charitable expenditures that equal or exceed approximately 5 percent of the value of its endowment.





WHAT MOTIVATES PRIVATE  
**FOUNDATIONS?**





# Study Their Funding Criteria

- **Interest area** i.e. arts, education, health etc
- **Location** Many funders only want to fund a specific geographic area
- **Grant size** Look at the number of grants and grant size in your interest area
- **New vs. old** Some funders are open to funding new organizations, some aren't
- **Relationships** Do you know anyone on their board or staff? Can you get a meeting with a program officer?
- **Types of support** Do they fund programs only and no operating expenses?

# How do I research foundations?

Foundation Directory Online

[fconline.foundationcenter.org](http://fconline.foundationcenter.org)

Instrumentl

[www.instrumentl.com](http://www.instrumentl.com)

GrantStation

[www.grantstation.com](http://www.grantstation.com)

Foundation Search

[www.foundationsearch.com](http://www.foundationsearch.com)





**THE APPROACH: TRY TO BUILD  
A RELATIONSHIP**

# Ask questions & listen!

Not every foundation will take your calls or do a visit but if they do...

Be prepared!

- Do your homework on their interests
- Ask thoughtful questions to find alignment
- Tailor your proposal to their interests and use their language







Rejection is part of the process. Accept it!

# When to Say No to a Funder

- It doesn't fulfill your mission
- It compromises a part of your mission or core values
- The opportunity cost is too great
- You cannot assume the risk



# How to handle rejection

- 1) Thank them for the opportunity to apply.
- 2) Thank them for their thoughtful consideration.
- 3) Ask them if they have any advice for you about how you could improve if you reapplied in the future.





Questions?

A woman with long brown hair and glasses, wearing a bright green short-sleeved top and a necklace with a circular pendant, is sitting on a brown leather couch. She is looking towards the right with a slight smile. In front of her is a dark laptop. To her left is a colorful geometric pillow with yellow, orange, and pink sections. To her right is a white pillow with the text 'GOOD VIBES' in bold black letters. The background wall has a light-colored, repeating pattern of stylized fan or shell shapes. A white speech bubble with a black outline is positioned above her head, containing the text 'THANK YOU!' in bold black capital letters.

**THANK YOU!**

Grab today's slides -> [Rachelmuir.com/handouts](https://rachelmuir.com/handouts)

# Want help?

**End of Year  
Fundraising**



**September**

**Write Better  
Emails &  
Appeals**



**October**

**Get Corporate  
& Foundation  
Gifts**



**November**

** [LeagueOfExtraordinaryFundraisers.com](https://LeagueOfExtraordinaryFundraisers.com) **