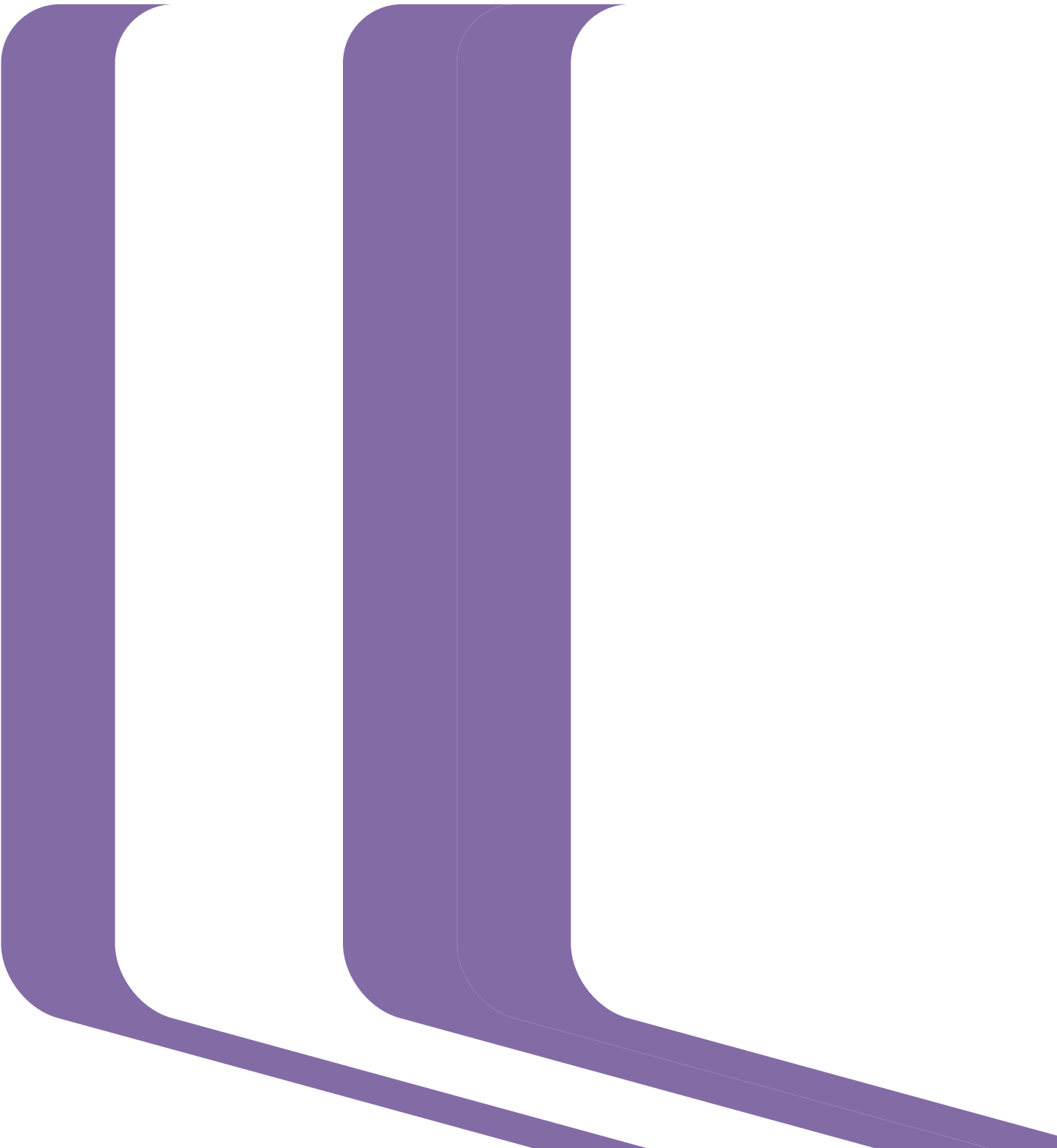


Future funding?  
Alternative funding for your project



**Information for readers**

|                                      |  |
|--------------------------------------|--|
| <b>When was it published?</b>        | January 2006   |
| <b>Need more information?</b>        | The easiest way to find out more is to go to: <a href="http://www.biglotteryfund.org.uk">www.biglotteryfund.org.uk</a><br>Or call 0845 4 10 20 30  |
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| <b>Accessibility</b>                 | Also available upon request in braille, on audio-cassette,<br>in community languages and in large print.   |
| <b>Our equality principles</b>       | Promoting accessibility; valuing cultural diversity; promoting participation;<br>promoting equality of opportunity; promoting inclusive communities;<br>reducing disadvantage and exclusion. |
| <b>We care about the environment</b> | The Big Lottery Fund seeks to minimise its negative environmental<br>impact and only uses proper sustainable resources   |
| <b>Our mission</b>                   | We are committed to bringing real improvements to communities<br>and the lives of people most in need.   |
| <b>Our values</b>                    | We have identified seven values that underpin our work: fairness;<br>accessibility; strategic focus; involving people; innovation; enabling;<br>additional to government.                    |

The Big Lottery Fund is committed to valuing diversity and promoting equality of opportunity, both as a grantmaker and employer. The Big Lottery Fund adopts an inclusive approach to ensure grant applicants and recipients, stakeholders, job applicants and employees are treated fairly.

Big Lottery Fund is the joint operating name of the New Opportunities Fund and the National Lottery Charities Board (which made grants under the name of Community Fund).

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Funding from Big Lottery Fund is for a finite period, so eventually you will need to look at alternative sources of funding. Corporate sponsorship is becoming more popular for many organisations as companies look kindly upon socially responsible projects. The upside of this is that community-based projects have a better chance than ever of being considered, but the downside is that you'll be facing plenty of competition. As getting corporate sponsorship, or indeed funding from almost any source, can take a long time it is never too early to start thinking about this.



This booklet is to help you understand what companies look for when they take up sponsorship. It was designed to assist you present your project in the best light. Every sponsor, and every sponsorship project, is different so you'll have to think hard about what best applies to your own organisation. You should also ensure that you select and target potential sponsors as effectively as possible.

# Choosing a corporate partner

For a potential sponsor, the fundamental value of a sponsorship comes from the association with you. Any sponsor hopes to add kudos to their own reputation, gain access to a new target audience or sell additional products through their sponsorship.

Ideally, this would work both ways so that you also gain from being associated with the sponsor – over and above any direct financial benefit. You must feel that the image and values of the sponsor are compatible with yours.

## Choosing who you don't want

Before you start, decide where you stand on working with sponsors whose ethical values may not be entirely in line with your own. Then ensure that everyone in your organisation, including any trustees, adheres to the policy you decide upon.

Some organisations say it is important to accept sponsorship from companies whose ethical credentials are less than perfect to ensure that they are paying back to society. Others say that this lends such companies an undeserved aura of respectability, and any association should be opposed in principle. In most cases this is a sliding scale.

Given your own organisation's mission and objectives, try to think about the ethics involved, and then define what criteria you would want to apply, if any. When thinking about this, it is suggested you consider the general areas of:

- nuclear activity
- pornography
- animal experimentation
- environmentally harmful practices
- marketing practices
- developing world exploitation
- human rights abuses.

Also think about the company's products and whether these are compatible with your activity and organisation. Finally, decide whether limitations should be applied to brands or across the wider parent company. At the end of this process draw up a general policy that highlights examples of acceptable partners, and gives very clear guidelines on unacceptable partners, naming those who will not be considered under any circumstances.

## Choosing who you do want

Try to define your own image in five words and write out your mission statement because this will help you to identify which companies are most compatible with you.

Then it is a matter of research. Mailing companies indiscriminately with a generic sponsorship proposal will not usually get you very far. It is much better to take the time to select and target companies and then produce a customised proposal that reflects their own image, aspirations, marketing objectives and usual practice back at them. Better still: get to talk to them on your own home territory by inviting them to an event.

Most large companies will have an annual report at the very least, and many will have documented policies for their sponsorship and community programmes or publish a corporate social responsibility (CSR) report. Use these to find out what they have done in the past. A phone call to the public relations department is a good place to start. If you find that they have not supported anything in a similar area to yours in the past it is not necessarily a cue to despair. If the match is good and you can give them a strong enough rationale then go ahead and try. There had to be a first time for everything and many companies are only just beginning to adopt seriously socially-responsible sponsorship programmes.

“Any sponsor hopes to add kudos to their own reputation, gain access to a new target audience or sell additional products through their sponsorship”

When you are going through this process don't just think in terms of cash sponsors but remember that in-kind sponsors can be equally valuable.

#### **Choosing how many partners you want**

Before you approach potential sponsors, decide how many sponsors you want, and what their relationship is to you, each other and, where applicable, Big Lottery Fund. The best thing to do is to draw up a sponsorship hierarchy, showing each sponsorship position available, right through from the most expensive option to the least expensive. The hierarchy can be flat (in that you have multiple sponsors all at the same level) – the important thing is that it is pre-determined and sponsorship is not allowed to just happen. It is always tempting to say yes to potential new sponsors and then worry about where they fit in later, but this will only ever be a very short-term benefit. In the longer term the whole process becomes messy, existing sponsors become dissatisfied and new sponsors are turned off because they cannot perceive a clear ownership niche for themselves. As a general rule always try to aim for fewer, but higher value sponsors.

#### **Choosing who to talk to**

Getting your proposal or invitation through to the right person is vital. If it lands on the wrong desk then it may never get to the person who needs to see it and the opportunity has been wasted.

The first thing to do is to look at your proposal and decide which way it is weighted. Is its primary appeal a commercial marketing one, or is it geared towards social responsibility? Then pick up the phone and ask the company who deals with their sponsorship and/or community programmes. If in doubt, or if there is no single person with allocated responsibility, always aim towards the top of the organisation rather than the bottom, and approach the marketing director first.

# Talking the language of corporate sponsorship

When approaching potential sponsors, try to talk to them in their own language. People often think sponsorship is a marketing word for a charitable donation. It isn't. When corporations talk about sponsorship they are referring to a financial investment that brings them commercial benefits in return. They perceive a direct value to themselves in being associated with the organisation or project they are sponsoring, and will expect to be able to exploit the association through advertising, events, promotions or other marketing tools.

It is important that your definition of sponsorship is the same as theirs. Think about what your organisation has to offer, but don't worry if it seems to you that this is limited. If you are a small organisation or charity then nobody will expect you to provide national exposure. Instead play to your strengths. Remember that your key attribute is the added value you provide in the community, and that many companies are keen to be seen to be supportive of community and others socially responsible activities.

These are some of the terms and definitions you should think about:

## **Sponsorship product**

Try to distance yourself from your organisation or event and think of it as a product. This will help you to evaluate its strengths and weaknesses more objectively. Be realistic when describing the benefits, audience, reach and exploitation potential. Don't hesitate to describe the aims, objectives and social impact. A sponsor will be looking for something that has an emotional appeal but which can also be justified in financial terms when it comes to end of year reviews.

## **Target audience**

Who benefits directly from your activity and who else has visibility of it? Say why these communities are important to the potential sponsor or deserving of support. Be specific and give as much demographic data as you can.

## **Profile**

Think about your organisation or event profile. Is this complementary to the potential sponsors? If it is, say why. There is no point in approaching a potential sponsor whose image and values clash with yours.

## **Exploitation potential**

Exploitation sounds like a nasty word but all it means is that a sponsor will look for ways of making sure their relationship with you is promoted to the widest possible audience. To this end, they'll need to assess what the exploitation potential of your product is. The more you can help them by indicating the scope and potential the better. Detail any past and planned media, advertising, event and promotional activity. Be specific about how the sponsor will be involved.

## **Sponsorship objectives**

As well as thinking about your own objectives for sponsorship, it is important to think about any objectives that the potential sponsor will have, and how you can help them to meet these. Don't be too specific about these in your initial approaches, but having them in the back of your mind will help you to adopt the right tone and make your approach seem more commercially realistic.



“People often think sponsorship is a marketing word for a charitable donation. It isn't. When corporations talk about sponsorship they are referring to a financial investment that brings them commercial benefits in return”

### **Sponsorship credits**

Once you have decided how many sponsors you need and how you want them to be involved you should draw up a sponsorship hierarchy, and allocate different levels of credit and branding to this. Sponsorship hierarchies can vary enormously and there is no right or wrong way, just the way that is most suited for you. Remember that looking after sponsors takes time and energy so err on the side of having fewer sponsors wherever possible. You will need to tell potential sponsors what form of sponsorship you are offering them. Some of these are listed below:

**A title sponsor** will typically have their name included within the name or title of the event or organisation.

**A major sponsor** would not be included in the title but would expect their name to appear immediately after the title or very prominently on any printed materials. This would be accompanied by words such as 'sponsored by' or 'made possible by'. The form of wording is up to you and the sponsor.

**Supporting sponsors** occupy a lower position than major sponsors and this is reflected in the type and size of credits they get. Rather than credits near the title they would be credited elsewhere on the page, such as the bottom and the strap line might carry words such as additional sponsorship from. It is a good idea to look at examples from large well established organisations to see how they credit multiple sponsors. It is also worth looking at posters and catalogues from major art or sporting events.

**Official suppliers or partners** are sponsors who are given exclusivity in that they are the only financial institution, or the only drink supplier etc. There is normally a direct relationship between their products and their credit wording i.e. Coke. Official drink of the Olympic Games.

### **Type of sponsorship**

Sponsorship doesn't have to be cash. Sponsors often find it easier to give products or services (known as sponsoring 'in-kind') so be creative in what you ask for. The bottom line is that so long as it saves you spending money yourself, it is adding value.

### **Sponsorship measurement**

Think about how sponsors can measure the success of their sponsorship before you approach them, and include this information in your approach. It shows that you have thought about their agenda as well as your own, and reassures them that this is a commercial and professional approach. If you cannot work out any measurement criteria then you should revisit the product offering and the potential sponsor objectives.

# What sponsors look for

Each sponsor will have an objective they want to achieve through sponsorship. Without conversations with the potential sponsor or an in-depth knowledge of the company's marketing plans, second-guessing these is impossible. Nonetheless, you can identify some common objectives, and it is useful to do so.

This is a summarised list of generic objectives held by corporate sponsors. When you are defining your sponsorship product, look at these objectives to see where your product is most likely to add value. The more objectives you feel you can meet the better, but meeting just one objective superbly is better than meeting several half way. If you don't feel that you can help sponsors meet any of these objectives then it is worth revisiting the product and the benefits you are offering to see if you can tailor them in any way to provide a better match.

Some of the objectives are more intangible than others but don't let that put you off.

## **Values transfer – image enhancement and reinforcement**

Values transfer operates where a sponsor is seen to have a visible and direct association with a prestigious or worthwhile organisation or event, thereby inferring that the sponsor has similar values and attributes. Socially worthwhile causes score highly here as they help corporations to show a caring attitude. Focus on the ability to communicate community and social responsibility, promote civic pride and the motivational factor for employees in your message to the sponsor.

## **Corporate and brand exposure**

This is where sponsors expect to gain additional exposure to target audiences through branding and advertising. This is related to values transfer as described above, and would be primarily dependent on publicity for the sponsored project. If your ability is limited here then be honest and don't claim things you cannot deliver. Remember that large organisations will have their own media departments and agencies. Rather than say target audience reach exists, talk instead about how the raw material (the sponsorship product) has the potential to influence their target audiences, thereby reiterating how an association with you can help to differentiate an organisation from its competitors.

## **Networking – corporate and trade hospitality**

Do you have links with local government, celebrities, opinion formers or anyone that the sponsor might be interested in talking to? Do you have access to a good venue, or do you know a venue that is willing to do you a favour? If so, use them. Sponsors often use their sponsorships to meet and entertain key people in local and national communities and the more you can offer in this area the better. Don't just think about events and meetings for senior managers and clients, but also consider what you might be able to do for employees and their families. And what about taking your project to the sponsor's own premises?

## **Promotional campaigns – product endorsement**

By creating promotional campaigns in which a socially worthwhile event or organisation is seen to endorse a product, corporations can often increase their product sales. This is a route that should be trod with caution, but one which can be very effective for both parties.

“When you are defining your sponsorship product, look at these objectives to see where your product is most likely to add value”

#### **Product showcase – implied endorsement**

This is where the sponsored activity or event provides a platform for the sponsor's product or services (in-kind sponsorships are often very good at this). Here sponsors are looking for a way to display their products outside their traditional sales environment, and gain competitive advantage. Bear in mind that this implies an official endorsement for the sponsor's products, and make your decisions accordingly.

#### **Retail and sampling opportunities**

These tend to be one or a series of discrete opportunities for sponsors to trial a product with a target audience. If you have heavy throughput of visitors or reach an extensive number of people this may be attractive to sponsors but it depends very much on who the sponsor's target audience is.

#### **Employee motivation**

Employee motivation is rarely the primary motivation for any sponsorship but it is a very useful supplementary benefit. It is especially useful if the potential sponsor is a major employer in your area, and you can demonstrate that employees and their families will have direct benefit. Try to think of ways that employees can be more closely involved, perhaps in a hands-on capacity.

#### **Target audience access**

Where a company has a particularly well-defined target audience (makers of baby products for example) then being able to prove that you reach this audience is a big plus factor. Think about who it is that your project or organisation deals with every day, then about which companies would be most interested in talking to them.

#### **Points of difference**

All of the above objectives have one thing in common, in that they seek to lend the sponsor a point of difference from their competitors. Other ways that you may be able to provide sponsors with a point of difference include exclusive merchandise (where their brand is used on merchandise), and sales promotions and incentives that use the association with you as the focal point.

# Defining sponsorship benefits

The benefits that you can offer to potential sponsors are not expected to be financially equivalent to their sponsorship fee. They represent goodwill on your part, demonstrate your willingness to work in partnership and provide the sponsor with a minimum level of visibility. When you have drawn up a list of benefits, don't think of them as being set in stone. Many, if not most, sponsors will want to adapt these to suit their own particular needs, maybe enhancing some and dropping others. With this in mind, present the benefits that you are offering as an example only, and indicate that you will be happy to work with sponsors on helping them achieve their objectives. Be flexible without indicating that you can be walked all over.

It is a good idea to have designated someone in your organisation as the sponsorship manager, and give them day-to-day responsibility for maintaining the relationship and delivering sponsor benefits. It's not a complex job but it is time consuming. Sponsors will expect high standards of delivery so the role needs to be effective, responsive and proactive. They won't be impressed if it takes a week to get a response from you, but they will be impressed if you spot an additional opportunity to promote their association and let them know about it.

Try to audit your organisation or project to list all of the assets that you can possibly use as sponsorship benefits. The list given here is a standard list of benefits and there may well be other things that you can offer. Don't be afraid to be creative.

## Credits and branding

Credits and branding are fundamental to any sponsorship agreement. The size, type and positioning of credits and branding depends on the level of the sponsorship and the fee paid, and will normally vary from title sponsorship to a simple name check. See the section on where and when to apply sponsor credits.

## Events – invitations and tickets

What events do you have or could you create that sponsors and their guests could be invited to? Think about networking events; media events; public events; seminars; and road shows, anything where people gather in numbers. Devise a specific role for sponsors, look for co-hosting and speaking opportunities and don't forget to thank them on the night.

## Media Relations

You should be prepared to initiate PR plans tied to sponsored activity, with dedicated publicity plans being prepared for major or title sponsors. The Publicity guidelines document contained in Your next big steps pack and available on the recipient area of our website was written to help you.

The plan you prepare should identify how and when you will proactively help the sponsor achieve their publicity objectives. Think very carefully about how you will get the sponsor's name in any PR credits as publicity for your project that excludes any mention of the sponsor has very little value to them. As a minimum all press releases should carry sponsor credits.

“It is a good idea to have designated someone in your organisation as the sponsorship manager, and give them day-to-day responsibility for maintaining the relationship and delivering sponsor benefits”

### **Sampling and promotional exercises**

What potential is there for sampling and promotional exercises? The larger your audience the better the potential, and there may be benefits for your own audiences too.

### **Industry exclusivity**

If you think you can say to a sponsor that they will be the only sponsors in their industry category then do it.

### **Preferential purchasing and hire rates**

If you have a building that can be used, or produce merchandise, try to find ways of making these available to sponsors at a reduced price. Not to the extent where you would lose money on the transaction, but enough to make the sponsor feel they are gaining a privilege. Try to assess how appropriate or attractive the offer would be to the sponsor, and position it accordingly. If it is very attractive make it a real feature. If you are not sure that the sponsor would gain very much from it then position it more as a supplementary benefit.

### **Database marketing**

Most companies are always looking for potential customers, so names and addresses can be very valuable to them. If you have an extensive database, try to think how this could be made available to sponsors, and what the benefit to them would be. Please note, however, that it is vital to observe legal requirements on data protection. Make sure that you are fully au fait with these before even thinking about making database information available at any level of detail.

### **Advertising concession**

If you have publications or any other type of media that can credibly carry advertisements, offer potential sponsors a reduced advertising rate. Many organisations, and particularly charities, sell advertisements in programmes and term this sponsorship. It is not, that is advertising. It only becomes sponsorship when it is part of a wider programme of sponsorship.

### **Corporate membership**

If you have any kind of membership that has benefits attached, such as events or a newsletter, you could offer potential sponsors free corporate membership. This has the added advantage of providing another way to stay in regular contact with sponsors, and to reach people in the sponsored organisation other than your direct contacts.

# Approaching sponsors

Possibly the hardest part of sponsorship is getting to meet potential sponsors. Large corporations can receive anything between 20 and 100 sponsorship proposals or charity appeals a week and making your proposal stand out is very difficult.

It is best to try and get face-to-face contact or at least talk to a potential sponsor before you put your proposal in writing. This is, of course, easier said than done but don't be frightened of picking up the phone. The worst that can happen is someone says no. Also think about creating a sponsor event, and inviting prospects to this.

If you know anybody who has a personal or business contact with your prospect then ask them to help, either by introducing the subject or by introducing you. Sponsors are people and they react better to approaches from their peers.

Where all else fails, write to your prospect. Keep it short, precise and relevant to your audience. Make sure you are absolutely clear about what you are looking for and always give a figure or a list of the products and services you are seeking. Don't expect to sell your sponsorship on the back of a letter or one meeting – this is a long process of nurturing and persuasion.

## When to approach

Give your potential sponsor plenty of time to make a decision. You should also be sure that you have the ability to provide all the benefits that you are offering within your time frame.

Find out when the potential sponsor's financial year begins and ends. This is more important when you are looking for larger (£100K+) financial sums as sponsors tend to plan their budget spend about six months before the new financial year and have little flexibility thereafter. At the other end of the spectrum, for much smaller sums, an approach towards the end of the financial year can also be beneficial as sponsors may be seeking to spend any of the contingency surpluses remaining.

As a general rule, never underestimate the time it takes for a sponsor to make a decision – allow three months for small sums and anything up to 12, 18 or even 24 months for larger financial sums. Don't get disheartened. Even with precise targeting it can easily take 10 telephone calls to make one contact, with maybe one in every 10 or 20 contacts made leading to a meeting. Getting sponsorship is always time consuming.

# Formatting a proposal

When the potential sponsor receives your proposal they will be asking themselves three questions:

- 1 Is there a potential benefit to my brand or company in being associated with the values and image of this activity or organisation?
- 2 Which or how many of the people I want to talk to will this sponsorship help me reach?
- 3 Is this the best marketing solution or will my money be better spent doing something else?

The more effectively you can answer these questions, the more chance you have of success. Keep it shorter rather than longer, which means being precise. These are the basic areas you should try to cover.

## **Mission**

Tell them, preferably in the first sentence, who you are, what your mission is, and who you reach. This will help them to decide if they are sympathetic to you.

## **Credentials**

Back this up with more detailed information, especially on your target audience. Highlight numbers and social benefits. Use references from satisfied clients, from opinion formers, and from other supporters. Where you have facts and figures, use them, you might find that the evaluation reports produced by the Lottery Fund have some good information you can use.

## **Sponsorship facts**

Give details on the facts of the sponsorship. Remember to give dates, locations, and audience demographics. Mention any special features, describe the publicity plans and summarise the sponsorship opportunity.

## **Proposition**

Be very clear about what you are offering, and what it is you are looking for in return. Take the time and trouble to relate the proposal specifically to the potential sponsor's industry or brand. Be realistic; if you are a small local charity talking to a major brand for example, then don't say that your proposal will extend their target audience reach or enhance their brand positioning. Instead say that it supports the brand positioning and complements their existing marketing activity, and that it will create immense community goodwill.

## Sponsorship credits – where and when to apply them

Sponsors must be given credits, i.e. their logo, possibly accompanied by a caption, on all print and any other publicity materials that relate to the part of your project they are sponsoring. There must, however, be a balance and you must be wary of over crediting the sponsor to the extent that they have implied ownership of your project. You must also bear in mind the needs of other funders and your own organisation's identity. Unfortunately there are no hard and fast rules. Often large corporate sponsors have in place set acknowledgement requirements as part of their contracts with you. These along with their PR companies or lawyers, can seem inflexible and demanding. Do not be daunted. Often these are generic requirements and are open to negotiation. Opposite is a table that will give you an idea of where you can expect your sponsors to want their acknowledgement.

If you received a grant to build or refurbish a facility (or some other permanent project) you must continue to acknowledge Big Lottery Fund's contribution. For example if you received £3 million to build a sports centre subsequent sponsorship should not erase the Fund's contribution. If you receive a large amount of sponsorship you should not change the name of the facility or put up signage that could imply the new sponsor funded or built the sports centre, nor should you remove any plaques or signage mentioning Big Lottery Fund. You are still required to let the public know where their lottery money is being spent, as per the conditions of your grant. However, if you received a grant to fund staff or services for a set period, for example if you are an out-of-school-hours childcare project, and the period of funding has been completed we would not expect you to continue to give Big Lottery Fund priority acknowledgement. In this example, credit should go to any sponsorship you have since received.

This means that generic sponsors (at every level of sponsorship) would end up with credits on everything, but specific sponsors (such as an event sponsor for example) would have credits only on materials related to the bit they are sponsoring.

The credits for generic (programme-wide) sponsors would also be sized and positioned according to their contribution. Thus title or major sponsors will have prominent credits – such as a large type size, on the front page, close to the title etc, whereas supporting sponsors will have smaller type sizes and will be credited farther away from the main action – at the foot of the page, or on the back page for example.

It is a good idea to draw up a list of your most common items, take the sponsorship hierarchy you have designed, and work out what credits would go where. You may have to adapt this a bit but it will give you a template and will be a good test of your hierarchy. If you end up with a mess of logos it's probably a sign that you have too many sponsors and need to rethink your sponsorship hierarchy and pricing strategy.



Use the following checklist as a basis for this activity.

#### **Literature/Print Items**

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- Posters
- Promotional leaflets
- Information leaflets
- Maps
- Guides
- Annual Reports/Corporate plans
- Media releases

#### **Non-print promotions**

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- Website/Emails
- Videos
- Visual Display Units (ads/screensavers etc)
- CD Roms/tapes etc

#### **Misc**

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- Exhibition displays
- Sponsor board (in reception/entrance)
- Non-print items such as large-scale machinery
- Exterior signage/crediting
- Vehicles
- Badging on donated/supplied items (e.g. PCs)
- Information reports

#### **Exhibition/Conference/Event Specific**

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- Banners & signage
- Invitations/entry tickets
- Delegate materials (inc badges)
- Verbally as appropriate
- Programmes/catalogues & promotional materials
- Taped transcripts (if applicable/produced)
- Event print (i.e. menus etc)
- Editorial foreword/sponsor listings

#### **Stress your flexibility**

You can only guess at a potential sponsor's motivations or marketing objectives. You don't want them to dismiss your proposal out of hand simply because you may have misjudged one statement, or because the package of benefits isn't quite right. It is always a good idea to say that this is an initial proposition that can and will be tailored to meet the sponsor's needs.

#### **Say what you want**

An astonishing number of people will send proposals to potential sponsors that never actually say what they are looking for. How can a sponsor make a decision unless they know what money or other item they are being asked for? So be specific about what you want.

#### **And finally**

We wish you every success in the continuation of your project.

# Notes



