

## State Leaders Guidance Regarding Commercial Engagement

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Developing relationships takes time and continuing effort. This document shares some recommendations for state leaders, who serve in a critical capacity to engage and maintain relationships with commercial entities and other partners. The revenue that sponsors and partners provide supports the organization including products and services for members.

This guidance is based on national ACTE staff knowledge and experience in developing relationships and reflects very similar guidance provided to ACTE's Board of Directors. Keep in mind that these are recommendations, but there are many ways to build and maintain productive partnerships.

### Action Steps

**Following Your Strategic Plan** – Think about the priorities you have related to your association budget, growth of membership, content and event priorities, etc. Your Strategic Plan should be developed with your goals in mind so that the amount of revenue you need to generate, along with other important benchmarks so that you can measure your success. Ensure that your fundraising plan is reviewed by leaders within your organization so that they are aware of it and can help with implementation.

**Identify a Lead** – While your association may not have professional staff who work on sponsorship and partnerships development, you might have someone within your leadership or someone within the organization at large who has experience in fundraising, grants development and outreach or similar experience. Secure a lead with experience who can lead and coordinate with the overall development efforts of the association.

**Build a team** – Even though you are a leader within the association, you are one person and have limited capacity. Think seriously about developing a team to work on sponsorships and partnerships. This could be assigned to an existing committee or a new working group might be developed. The group should meet regularly with defined goals and a feedback mechanism to your staff and Board of Directors.

**Identify potential sponsors** – There may be industries, organizations and companies selling products to schools that align better with specific fields of study and priorities. Identify the leaders who are best suited to align with the activity you are interested in supporting. Think about the appropriate individual to contact. Many companies have marketing staff who routinely seek opportunities for promoting their company or specific initiatives.

Companies also have HR staff who are concerned about acquiring a skilled workforce. Seek opportunities to learn about these leaders and what their priorities are, such as through a company website or annual report. If you learn about an organization that is a fit related to sponsorship of specific Division, include that Division leader in the conversations. They will be able to guide you related to the activities best suited for support. If you find out the potential sponsor is not a good fit keep them in mind and continue periodic communication for future opportunities.

**Meet with the potential partner/sponsor** – Begin with a brief meeting to discuss the goals and priorities of the organization you are meeting with and what the association can offer. ACTE staff usually meet for a half hour in their initial meeting with potential partners. The meeting can occur either “in person,”

over the phone or online through a virtual platform. It's fine to be a bit more informal but try to keep the meeting focused. Operate professionally like how a business operates (e.g. be organized and send a meeting request, take notes and follow up promptly).

Consider sharing a few PowerPoint slides, website links or other resources during your meeting to highlight your points, but ensure that the overview is focused and high-level. Include specific opportunities that you are seeking the organization to sponsor/partner on. ACTE seeks to provide options that align with the organization's goals and the clearly explains the benefits and expenses involved.

**Follow up** – After a call or meeting, it's important to follow up and stay engaged with your contact. Send an email thanking them for the meeting and recapping a few of the items discussed and action steps agreed to.

Even if the contact does not sponsor, keep engaged with them, sharing updates on what the association is doing that might be of interest to them. With the support of your team,, you can send an email on a quarterly basis, or make a call if something very aligned with the contact is occurring.

Take a few minutes to send an update to keep your team and leaders apprised of the direction you're heading so everyone is "on the same page."