



RESOURCE FOR DELIVERING SPONSOR VALUE: TEMPLATES, TOOLS, AND BEST PRACTICES

TABLE OF CONTENTS

I. Introduction	II. Best Practices for Maximizing Sponsor Value
III. Menu of Sponsor Benefits	IV. Customizable Templates
V. Checklist of Deliverables	VI. RP Gifts vs. Sponsorships
VII. Conclusion	

I. INTRODUCTION

This guideline presented by the ASHRAE Communications Committee aims to streamline the process for ASHRAE chapters to attract, manage, and retain sponsorships by providing customizable templates, content ideas, and a checklist to ensure deliverables are met.

Additionally, the [Manual for Chapter Operations](#) contains suggestions for sponsorships and chapters are encouraged to review the Manual for Chapter Operations.

Consider integrating support for the RP campaign into sponsorship offerings. RP support invests in industry research while sponsorships sustain chapter operations. Minimum RP Honor Roll recognition for companies and organizations begins at \$500. Including RP in sponsorship packages strengthens ASHRAE’s mission and supports chapter RP Campaign goals.

All sponsorship activities must comply with ASHRAE’s Commercialism Policy and Guidelines. Chapters should familiarize themselves with these policies to ensure adherence. The policy can be reviewed [here](#).

II. BEST PRACTICES FOR MAXIMIZING SPONSOR VALUE





1. UNDERSTAND SPONSOR NEEDS AND GOALS

- **Tailor Packages:** Customize sponsorship packages to align with the sponsor's goals, such as increasing brand visibility, networking, or community engagement.
- **Survey Sponsors:** Ask sponsors for feedback on their desired outcomes and how they measure success (e.g., leads, website traffic, or brand awareness).

MCO Sections 2.17 , 1.6

2. OFFER HIGH-IMPACT VISIBILITY

- **Prominent Logo Placement: Feature sponsor logos in high-visibility locations, such as:**
 - Event banners.
 - Digital communications (newsletters, social media, and chapter website).
 - Printed materials (event programs, flyers, and table signage).
- **Social Media Recognition** Highlight sponsors in pre-event, live, and post-event social media posts. Include tags and links to their website or social profiles.

MCO Sections 2.20 , 2.18

3. CREATE MEANINGFUL ENGAGEMENT OPPORTUNITIES

- **Speaking Opportunities:** Allow top-tier sponsors to address attendees at events or participate in panel discussions, aligning their expertise with the audience's interests.
- **Networking:** Facilitate connections between sponsors and key stakeholders in the chapter, such as members, contractors, or consultants.
- **Interactive Booths or Exhibits:** Provide a space at events for sponsors to showcase their products or services.

MCO Sections 2.1 7, 2.7

4. LEVERAGE EVENT DIVERSITY

- **Diverse Events:** Involve sponsors in various chapter activities, such as:
 - Monthly technical meetings.
 - Social events (golf tournaments, picnics).
 - Educational seminars or training sessions.
- **Tailored Opportunities:** Match sponsors to events that align with their expertise or target audience.

MCO Sections 2.18 , 2.7

5. DELIVER WHAT YOU PROMISE

- **Checklist for Deliverables:** Maintain a clear checklist to track the benefits offered to each sponsor tier and ensure timely delivery.
- **Timely Communication:** Keep sponsors informed of upcoming promotional opportunities, event schedules, and logistics.
- **Post-Event Follow-Up:** Send thank-you messages and highlight how their support benefited the chapter and community.

MCO Sections 2.17 , Appendix 1A



6. SPONSOR RECOGNITION & LONG-TERM PARTNERSHIPS

- **Live Acknowledgment:** Mention sponsors during chapter meetings, event speeches or presentations, emphasizing their contributions to the chapter's success.
- **Award Opportunities:** Present certificates, plaques, or awards to major sponsors as a token of appreciation.
- **Newsletters and Reports:** Include sponsor recognition in post-event newsletters and reports.
- **Annual Sponsorships:** Offer opportunities for sponsors to commit to year-round support, giving them consistent visibility and engagement.
- **RP Donor Recognition:** Build a minimum RP donation into the Sponsorship so the sponsors can enjoy annual recognition by Society.

MCO Sections 2.17 , 2.18

III. CUSTOMIZABLE SPONSORSHIP MENU TEMPLATE

Below is a template menu of example benefits and sponsor packages. An editable Canva version of this sponsorship menu is available here: [Editable Canva Menu](#). Chapters can customize the menu based on their budget, special events, resources, infrastructure, and unique needs.

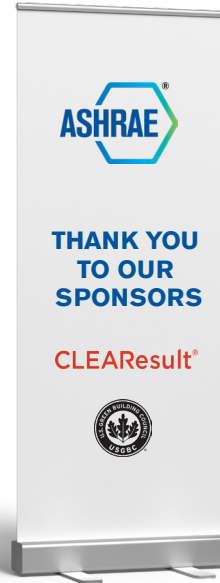
SPONSORSHIP BENEFITS	DIAMOND \$5,000	RUBY \$3,000	SAPPHIRE \$2,000	EMERALD \$1,500
Recognition on Website and in Newsletter as Sponsor	•	•	•	•
Recognition at each Chapter Meeting as Sponsor	•	•	•	•
Prominent placement on sponsorship sign during Chapter Meetings	•	•	•	•
Free Admission to Chapter Meetings	10	8	4	
Tabletop Signage at each Chapter Meeting	•	•	•	•
RP Donation on Behalf of Company	\$1,000	\$750	\$500	\$250
Complimentary Tickets to Special Event	6	4	2	
Golf Tournament - Sponsorship Sign at one hole	•	•		
Social Media Spotlights	•	•	•	•
Vendor table for displaying marketing material at one Chapter Meeting	•	•		
Sponsor Recognition Plaque	•	•	•	•
Logo in Event Program Flyer and Thank You Slides	•	•	•	•



IV. USE CUSTOMIZABLE TEMPLATES – EXAMPLES BELOW



EVENT PROMOTION SOCIAL POSTS
Templates to announce sponsored events with sponsor logo.



EVENT BANNER
Vertical banner with sponsor logos organized by tier.



EVENT PROGRAM FLYER
Include space for sponsor logos and recognition text.



EVENT TABLETOP SIGNAGE
Editable design for sponsor logos and messaging.



THANK-YOU SLIDES
PowerPoint slides to display acknowledgment for sponsors before and after event.



SOCIAL MEDIA THANK YOU POST
Graphic with chapter logo, sponsor logo, and a thank you message.



V. CHECKLIST OF DELIVERABLES

Use a checklist to ensure promised deliverables are met. The following checklist serves as an example, and each chapter should adjust it based on their benefits to sponsors, specific sponsorship packages, and unique chapter events.

DELIVERABLE	FREQUENCY	CHECK
PRE-EVENT		
Confirm sponsor commitment and signed agreement.	Once, upon agreement.	
Share the finalized sponsorship menu with the sponsor.	Once, upon agreement.	
Verify sponsor logos and branding materials are received.	Once, 4-6 weeks before event. By October 1st for annual sponsorships	
Update digital platforms (website, banners, newsletter, etc.)	Once, as soon as possible. By October 1st for annual sponsorships	
Ensure sponsor is mentioned in pre-event marketing efforts.	Weekly leading up to the event.	
DURING THE EVENT		
Display sponsor branding (signage, slides, tabletop materials, etc.).	Throughout the event.	
Mention sponsor in opening/closing remarks.	During remarks at the event.	
Ensure sponsor receives agreed-upon benefits (e.g., vendor table, complimentary tickets, etc).	As outlined in package.	
AFTER THE EVENT		
Share photos or videos featuring sponsor branding.	Within 1-2 days post-event.	
Publish thank-you posts on social media with sponsor tags.	Within 3 days post-event.	
Send a post-event report summarizing sponsorship outcomes (attendance, reach, etc.).	Within 1-week post-event.	
Request feedback from sponsors to improve future collaborations.	Within 2 weeks post-event.	
Send sponsor donations with all donor identifying information directly to ASHRAE Headquarters. ASHRAE will receipt donors for their contribution to the RP Campaign.	Send within 2 weeks post-event. <i>(see MCO 2.17 and appendices 2L and 2M for instructions on submitting funds)</i>	



VI. ASHRAE RP Gifts vs Sponsorships

CHARITABLE GIFT

Voluntary donation made to support the ASHRAE RP Campaign.

- No substantial return benefit to the donor
- Tax-deductible (in the United States, or per local laws)
- Recognition is allowed (annual Honor Roll, ASHRAE web pages, Chapter publications)
- Tangible benefits are allowed if they are low-cost “token gifts”, per IRS rules (logo items, mugs, commemorative items, etc.)
- Funds advance ASHRAE Research or Scholarships

SPONSORSHIP

Business transaction that supports an event or activity.

- Donor receives tangible marketing value
- **Not tax-deductible** as a charitable gift
- Benefits may include logo placement, ads, exhibit space, registrations, event tickets, or speaking opportunities
- Payment is tied to a **defined package of promotional benefits**

Simple rule:

Gift = philanthropy. Sponsorship = marketing.

Many ASHRAE Chapters set event or annual sponsorship levels which include a gift to RP as part of the sponsorship. For ideas, examples, and further information visit ashraerp.com/training.

VII. CONCLUSION

By following these best practices, chapters can ensure a seamless sponsorship experience, providing value to sponsors while maintaining professional standards. Use the templates and checklist to keep track of all promised deliverables and strengthen relationships with sponsors for future opportunities. Ensure all activities align with [ASHRAE's Commercialism Policy](#) to uphold the organization's integrity and objectives.

ⁱ Section 2.17 (Research Promotion Committee): Suggests developing a prospect list and tailoring efforts to align with business interests of sponsors.

ⁱⁱ Section 1.6 (Board of Governors): Mentions identifying and communicating with prospective sponsors early in the planning process.

ⁱⁱⁱ Section 2.20 (Communications Committee Chair): Encourages collaboration with the Communications Chair to ensure sponsor visibility on digital platforms (social media, newsletters, etc.).

^{iv} Section 2.18 (Special Events Committee): Discusses sponsor recognition during special events and the inclusion of branding opportunities like banners and signage.

^v Section 2.17 (Research Promotion Committee): Recommends engaging sponsors by providing opportunities to interact with members and participate in chapter events.

^{vi} Section 2.7 (Chapter Technology Transfer Committee): Suggests using sponsored events to share technical knowledge and connect with professionals in the HVAC&R field.

^{vii} Section 2.18 (Special Events Committee): Encourages using diverse events like golf tournaments, seminars, and social gatherings to involve sponsors in different ways.

^{viii} Section 2.7 (Chapter Technology Transfer Committee): Suggests involving sponsors in technical events and monthly chapter meetings.

^{ix} Section 2.17 (Research Promotion Committee): Recommends assigning goals and responsibilities to committee members to ensure all deliverables are met.

^x Appendix 1A (Chapter Operations Calendar): Suggests using timelines and schedules to ensure chapter commitments are delivered as planned.

^{xi} Section 2.17 (Research Promotion Committee): Suggests acknowledging sponsors throughout the year and during dedicated events, such as “Research Promotion Night” and encourages maintaining a list of past sponsors and donors, recognizing their continued support, and cultivating long-term relationships.

^{xiii} Section 2.18 (Special Events Committee): Highlights recognizing sponsors during events like chapter meetings and other chapter activities.