Situational analysis

*The purpose of this situational analysis exercise is to evaluate the current state (including capability and capacity to manage and deliver sponsorships/donors), future goals and aspirations. It is also to perform a SWOT and competitor analysis in regard to your current state.*

|  |
| --- |
| 1. **Current state**
 |
| How would you describe your relationships with your existing sponsors/donors? |
|  |
| What is the current level of funding you receive from donors/sponsors? |
|  |
| What partners are you having the most success with? Why? |
|  |
| How have sponsors and donors been recognised/looked after in the past? What benefits have they received? Do you have any written recognition policies for donors or sponsors? |
|  |
| Within your team, who does what in terms of identifying, approaching, negotiating with sponsors or donors? And likewise in terms of managing relationships? Are the Board of Trustees Senior Leadership Team and Foundation all involved? Are donors and sponsor partnerships managed by the same people/teams? |
|  |
| What challenges has your team experienced with securing/retaining corporate and philanthropic funding previously?  |
|  |
| Have you lost any partners recently? If yes, why is that? |
|  |
| Are there any sensitivities that we need to be aware of with existing/prior sponsors? Any specific businesses/sectors that you wish to exclude? |
|  |

|  |
| --- |
| 1. **Future state/aspirations**
 |
| Do you have any funding targets (partnership funding and grant funding) in mind at this stage? |
|  |
| What are your organisation’s broader income diversification objectives? Have these been set as yet and if so, what are these? |
|  |
| Are there specific costs that you seek to cover with partnership funding or would the funding be uses for general operations? |
|  |
| Do you have any specific non-financial outcomes that you seek from partnerships? E.g. Grow database, increase profile, engage new audiences etc. |
|  |
| Do you have any preferences around the structure/framework for a sponsorship and donor programme i.e. tiers of giving/investment level? |
|  |
| What are the wider organisation’s strategic objectives for the coming year/beyond? |
|  |
| Are there any particular sponsors or donors that you have in mind at this stage? Or types of sponsors/donors (eg. Business from a particular sector/national vs. local businesses)? |
|  |
| **Bring these documents together (if available)*** List of prior sponsors/donors, how they contributed (cash/contra) and at what value
* Copy of any prior funding proposals presented to potential donors/sponsors
* Strategic plan (or any other strategies or policies which will need to integrate with this work)

Audience analysis (demographics, segments or psychographics) |

Strength, weakness, opportunities, and threats (SOWT) analysis

A SWOT is useful in identifying areas where a sponsor can enhance an organisation’s strength or help to ‘solve’ an organisation’s weakness or mitigate a threat. It also helps identify opportunities which can be packages up as activations and benefits for a sponsor to own.

Please complete the below template:

|  |  |
| --- | --- |
| Strengths | Weaknesses |
|  |  |
| Opportunities | Threats |
|  |  |

Competitor analysis

Please consider your direct competitors (organisations or groups operating in the same space, competing for donors, sponsors, audience and media). It is also useful to consider indirect competitors who are vying for the same audience and sponsors/donors as you.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Organisations | National/Regional | Relevant sponsors of the competitor  | Analysis of competition: (direct/indirect) (High/medium/low risk) | Other funders trusts/foundations |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |