HOW TO REQUEST A SPONSORSHIP OR DONATION

We've been getting quite a few inquiries about sponsorships and donations. Here's how the process works…

1. Complete of a **Sponsorship Intake Form** and submit to your Manager for approval. Include any related documents or brochures where necessary. Marketing needs at least 30 days to process and provide support materials. Steps 1 and 2 can take some time to complete, so please take that into account.

2. If the organization is set up as a vendor in Concur, skip to step 3. For organizations not yet in Concur, request a W-9 from them. Email their completed w-9 to Samantha.Davis@carsonteam.com. Specify which Business Entity they should be listed under (CECO, WECO, Campo, etc.) in that email. Once they are set up in Concur, proceed to step 3.

3. Submit a PO Request into Concur at least 30 days in advance of any deadlines. **This step formalizes the request and initiates the secondary review process.** Reference the image below to enter the information in the appropriate field. Upload Sponsorship Intake Form and accompanying documents. See file titled **"How to Create a PO for Contributions"** for more detailed instructions on requesting a PO if needed. Upload the Sponsorship Intake Form and all associated documents to the PO, preferably combined into a single document if possible.

4. The PO submission sends your sponsorship request to James Haselhofer and Matt Benz for review and final approval. Once approved, you will be emailed a PO number from Concur. For monetary contributions, submit an invoice (or acceptable alternative[*]) with the PO number to acctspay@carsonteam.com. For other types of contributions, communicate with the necessary department(s) for fulfillment of product, collateral, etc.

[*]You may not always have an invoice in donation and sponsorship situations. Acceptable alternatives would be a request letter, or similar document, that outlines payment information such as how a check should be addressed and where it should be mailed to.

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