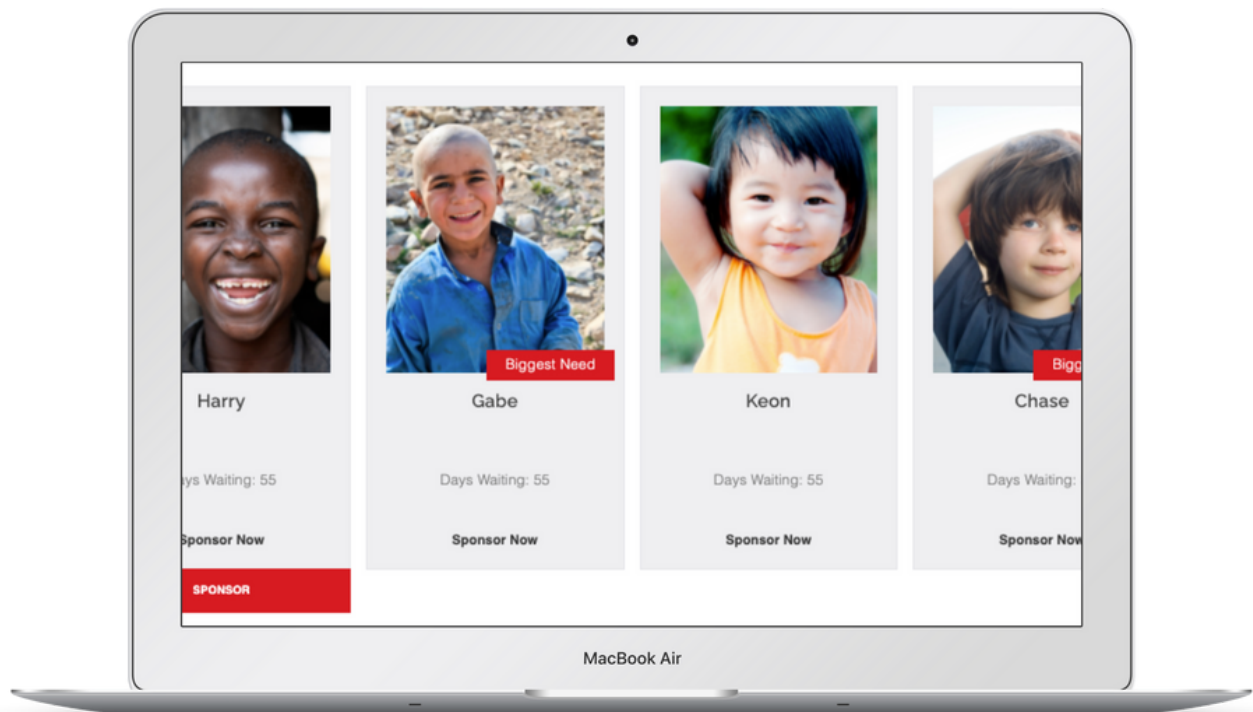# REACH

SPONSORSHIP CHECKLIST

We have compiled a list of items for your organization to consider prior to building our your sponsorship program in REACH.

Predetermining your preferences as an organization for these items will greatly help simplify your setup process.

We hope you find this list helpful - regardless of whether you are creating a new sponsorship program or moving your current sponsorship program into REACH.

NO. 1 — SPONSORSHIP CUSTOM FIELDS

What information do you want to capture for each sponsorship (ex: Grade, Favorite Activity, Favorite Color, Favorite Subject)? Age is automatically calculated and displayed using the sponsorship's date of birth.

Which of these items do you want to be shown publicly, to admins only (ex: vaccination record) or to sponsors only (ex: Report Card)?

NO. 2 — SPONSORSHIP & SHARE TYPES

Do you want to allow multiple sponsors to support each sponsorship? If so, how do you plan to break down the sponsorship cost (ex: how many shares; the cost per share; frequency options of monthly, quarterly, bi-annually, yearly)?

Do you want to further sub-divide your sponsorship shares into share types? (ex: Healthcare, Education, Nutrition).

NO. 3 — SPONSORSHIP IMAGES

Do you have an image readily available for each sponsorship? If not, do you have a placeholder image you can use? REACH requires an image for each sponsorship listed.

Tip: When saving your sponsorship images, name the image files the same as you plan to name your sponsorships to make the import process easier.

NO. 4 — NAMING SPONSORSHIPS

Consider any privacy concerns for the countries you serve. Do you want to hide the sponsorship name from the public view?

Tip: Some partners will use first name only, whereas others use a numerical system for sponsorship naming.

NO. 5 — PREVIOUS SPONSORSHIP SYSTEM

Do you want to include an external reference ID from a previous system? This is particularly useful for organizations seeking continuity from a previous system in reporting and record keeping.

NO. 6 — CLASSIFYING SPONSORSHIPS

Do you want to include sponsorships that have left your program or graduated?

REACH allows you to classify your sponsorships by Status (Fully, Partially or Unsponsored), Visibility (Public or Hidden) and Program Status (Active, Left Program or Graduated).

NO. 7 — FAMILY UNIT GROUPING

Do you want to link sponsorships into family units? (ex: link siblings or households) If so, do you want sponsors to also be able to sponsor the entire unit?

NO. 8 — SPONSORSHIP FILTERS

When a potential sponsor searches for a sponsorship, what search filters do you want available? Status, Type, Place and Age are automatically included within REACH.

Some common added examples are by biggest need, project, gender or birth month.

NO. 9 — SPONSORSHIP CONVERSATIONS

Do you want to allow admin-moderated communication between your sponsors and sponsorships?

If so, do you want attachments (ex: images and files) and/or video to be exchanged with these conversations?

What other rules and guidelines do you want in place for this?

Tip: If enabling conversations, we recommending providing your sponsors with a list of suggested topics to discuss and to avoid.

NO. 10 — SPONSORSHIP GIFTS

Do you want to provide the ability for sponsors to purchase and/or donate gifts for their sponsorships?

REACH enables organizations to set up a Gift Catalog where sponsors can log in and choose to purchase a gift for their sponsorship.

NEXT STEPS

Once you've taken these into consideration, it's time to get your sponsorship program up and running in REACH.

- Be sure to schedule a personal demo with one of our support team members. This is a great way for us to show you around and provide guidance tailored to your organization's specific needs.

    www.reachapp.co/contact-us

- Visit our Knowledge Base for a Setup Checklist and several articles to walk you through the process.

    www.reachapp.co/reach-knowledge-base

"For a small mission group based out of Zimbabwe and a sponsorship program that grew fast, REACH has been a lifesaver!"
- Brittany W.

*Review submitted on Capterra

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