



FACT SHEET 009

ROLE OF THE PATRON

This fact sheet clarifies the role of Patron in a nonprofit organisation, sets out key considerations before inviting a person of renown or prominence to fulfill such a role, and suggests a checklist to guide the approach to a new person or review the arrangement with an existing Patron.

Ideally, detailed planning should precede any appointment to this strategic, public and high profile position.

Where one or a number of Patrons are in place, this article may assist the Management Committee, CEO and the Patron/s themselves in determining whether the appointment is bringing the desired benefit or value originally planned or anticipated.

DICTIONARY DEFINITIONS

Patronage	support given or custom brought by a patron, position of patron, practice of making appointments to office, granting contracts.
Patron	person who sponsors or aids individuals (eg artists), nonprofits or charities; protector or benefactor.
Patron Saint	a saint regarded as the particular guardian of a country, person, etc. (<i>Patron Saint</i> has been included for discussion, as many Patrons seem to be promoted as such. If this is the case, the role and function of the Patron Saint should still be clearly defined to ensure value to the organisation.)

There are two main options for the role of a Patron - from the organisation's perspective, passive, or active

PASSIVE ROLE

Lending of their name by a reputable, high-profile person or organisation in order to add to the credibility and integrity of a charitable organisation and its worthy products (e.g. Anti-Cancer Council Sun-Smart products), or worthy service (e.g. youth homelessness).

Adding weight to the capacity of a charitable organisation to progress its purpose, especially its public image and income-generating capacity and performance, e.g. attending fund-raising events as a VIP guest, keynote speaker, 'fronting' a public appeal, featuring on promotional leaflets.

Being one of a number of Patrons of an organisation to be listed on letterhead, pamphlets and Annual Reports to signal their endorsement of the organisation and its purpose or cause.

ACTIVE ROLE

Lending of their name by a reputable, high-profile person or organisation in order to add to the credibility and integrity of a charitable organisation or worthy product and lending time, effort, contacts, influence, ideas, inspiration and/or own money in order to progress the activities of the charitable organisation, its worthy products or services

Adding weight to the capacity of a charitable organisation to progress its purpose, especially its public image and income-generating capacity and performance, eg attending fund-raising events as a VIP and playing an active role by contributing to the program of activities (eg presenting an address), generating full-paying contributions (e.g. organising or sponsoring a table of 10 people to a fund-raising dinner), writing material to be included in promotional material.

FOUR STEPS FOR SELECTION

1. Determine the desirable role of the proposed position of patron, i.e. whether the proposed role is passive or active: '*passive*' implies that the patron may need to be catered for, organised, supported, and funded or subsidised, whilst '*active*' implies that the patron will be expected (and must be willing) to make a positive contribution in terms of time, effort, contacts, influence, ideas, inspiration and/or own money - and will certainly need to be catered for, organised, supported and funded or subsidised.
2. Determine the desirable value of a patron's support or activity to your organisation - the Management Committee and CEO need to be convinced that there is potential for real value to the organisation, and to the patron her/himself, in the proposed relationship. It should always remain the responsibility of the organisation to ensure that such value results in increased benefits for the organisation's service-users or target group - which means that the value should be at least identifiable and at best measurable.
3. Specify the nature and extent of practical support (this will include the organisation's financial and other resources) needed to support both the person and the function, ie the direct costs to the organisation of having a patron who is both effective and satisfied.
4. Design processes and procedures that will ensure:
 - a) appropriate, achievable, affordable and annual objectives or outcomes that will positively demonstrate or reflect the contribution of the patron in terms of value to the organisation,
 - b) avoidance of risk, embarrassment or misfortune to the Organisation or to the patron,
 - c) that every person in the organisation - and the patron her/himself - knows and understands the role and function of the patron, and is aware of the resources allocated to support the person in that position: this should avoid any misinterpretation of the role and function, and increase the effectiveness and confidence of the Patron,
 - d) active and consistent acknowledgement and support throughout the organisation to the role, function and contribution of the patron,
 - e) a formal annual review discussion to enable the patron and the President or Chairperson of the Management Committee to review the position, discuss continuation, and ensure ongoing satisfaction for both parties, and
 - f) a consistently high level of job satisfaction for the patron.

Ensure that the proposal will be attractive to the person to be approached, as this person will need to carefully consider the offer - which in effect means 'carefully consider your organisation'. When these steps have been completed, the Management Committee can then turn their attention to likely identities.

CHECKLIST IN DETERMINING THE BEST PERSON TO FILL THE PATRON ROLE

These initial and internal discussions should be protected by confidentiality:

1. Consider desirable and appropriate identities that could be approached to fill the identified role and function, the

most appropriate manner in which such an approach should be made, and the most appropriate person within the organisation to do so - usually, but not necessarily, the President or Chairperson.

2. In the case that several identities are seen to be desirable, the Management Committee would be wise to discuss and agree on their expectations of the role, and use the agreed expectations as 'selection criteria' to finally agree on one desirable identity to be approached.
3. Prepare a formal letter of invitation, signed by the President or Chairperson on behalf of the Management Committee, setting out the Management Committee's offer and clearly explaining:
 - a) the expectations of the Management Committee as to the role, responsibilities, relationships, desired outcome and support to be provided by the organisation to the role of Patron, and to the person undertaking the role,
 - b) financial implications, setting out the manner and extent to which the organisation proposes to provide practical and/or financial support to the position, together with the detailed expectations of the organisation as a result of appointment,
 - c) draft process of introducing the Patron, once appointed, to the organisation, to the organisation's key stakeholders, and to the community served by the organisation: explain that this draft will be the subject to discussion with and acceptance by the Patron upon appointment,
 - d) period of time offered to the person being approached to consider the offer, and the nature and extent of assistance available from the Management Committee during this period to assist the person to explore and consider the offer (Such support may include a visit by the person to the organisation's headquarters and service sites, and facilitation of independent discussion with external parties to gauge the organisation's public image and reputation: it is important to realise that the person being approached needs to be convinced that the role of patron of your organisation will add value to their own public image and community standing.)
 - e) an invitation to the person being approached to meet informally with members of the Management Committee in the near future to discuss the offer, and

- f) an assurance of confidentiality on the part of the Management Committee, and request for same on the part of the person being approached.
4. The letter should be accompanied by a folder containing:
 - a) the organisation's latest annual report complete with audited financial statements,
 - b) a history of the organisation's activities and growth,
 - c) current service model,
 - d) current service-user or target group profile,
 - e) constitution,
 - f) current strategic and business plans, desirably featuring the function of the patron in the promotional, public profile, community relations and financial strategies, and
 - g) draft of proposed design of corporate documents and material to feature the patron.
 5. In the event that the initial approach does not receive a positive response, the President or Chairperson of the Management Committee should request advice from the person as to the reason for not accepting at this time:
 - a) it is possible that the timing of the offer may not be convenient, but it is also possible that the approach may not be appropriate or that your organisation is not compatible with the public profile or community contribution with which this person wishes to be formally associated,
 - b) their response will almost certainly assist the Management Committee in considering a further approach, either to this person or to another desirable identity.

The rationale for this Checklist is that the person to be approached needs to be assured that your organisation has carefully considered the position, carefully selected him/her as a desirable patron, and carefully prepared a formal, professional, business-like yet personable approach.

The initial approach is critical in establishing a relationship that takes account of the needs and interests of both parties - the organisation and the potential patron.

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