



Procedures for Sponsorship Approval

Parent Policy Link:	<i>Sponsorship Policy</i>		
Procedure Reference	SPNPR_2204N_SPN/ADV		
Procedure Sponsor:	Director, Advancement		
Procedure Contact:	Director, Advancement		
Stakeholders:	Employees, Students, and Affiliated Organizations or Individuals		
Approved by:	Policy Sponsor		
Effective Date:	April 4, 2022		
Last reviewed:	April 2022 (NEW)	Scheduled review date:	April 2027

1. Purpose

This Procedure outlines the process for obtaining Sponsorship approvals under the Sponsorship Policy at Okanagan College.

2. Scope and Application

This Procedure applies to all Okanagan College employees, students, student groups, clubs and classes, and volunteers who are involved in any aspects of acquiring Sponsorships for any department or program at the College.

3. Procedures

Sponsorship Clearance Form

- 3.1 The Sponsorship Clearance Form (attached as Schedule A) will be submitted to the Advancement Office for review and approval by the Sponsorship Lead well in advance of the proposed initiative.
- 3.2 The Sponsorship Lead will gather all information necessary to complete the Sponsorship Clearance Form, including but not limited to:
 - a) Contact information of the Sponsorship Lead
 - b) Information about the event, activity or initiative
 - c) Information about the sponsor(s), including Due Diligence research
 - d) Sponsorship plan
 - e) Promotional materials
 - f) Budget

- 3.3 The Director of Advancement will review the Sponsorship Clearance Form and provide timely feedback on the proposed prospects for Sponsorship, and will identify any conflicts or if a relationship with a potential donor or Sponsor has already been initiated.
- 3.4 The Sponsorship Lead will receive timely notification from the Director of Advancement, either denying the request with reasons, or approval to begin solicitation for the Sponsorship. The Director of Advancement will provide advice and guidance as needed.

Sponsorship Agreement

- 3.5 Following approval of the Sponsorship Clearance Form, the Sponsorship Lead will initiate a Sponsorship Agreement between the Okanagan College and the Sponsor. The Sponsorship Agreement is available on the College's Template Library.
- 3.6 Where appropriate, Sponsorship Agreements for more complex Sponsorship arrangements will be developed in consultation with the Director of Advancement and the appropriate Vice President.
- 3.7 In accordance with the College's Signing Authority Policy, and Schedule E - Approval Matrix for Revenue Generating and Other Agreements, all Sponsorship Agreements will be submitted in Etrieve for approval.
- 3.8 Sponsorship Agreements will receive the following approvals prior to the proposed initiative or activity taking place:
 - a) The Sponsorship Lead's Dean/Director and Vice President (for Sponsorships valued up to \$100,000),
 - b) and the President (for Sponsorships valued over \$100,000)
- 3.9 In order to receive approval, the Sponsorship Agreement will have an approved Sponsorship Clearance Form attached.
- 3.10 Approved Sponsorship Agreements will be filed in the College's Contract Registry.

4. Related Acts and Regulations

College and Institute Act

5. Supporting References, Policies, Procedures and Forms

Graphic Standards Manual

Naming Policy

Signing Authority Policy

Sponsorship Agreement Template and *Sample Schedules* (see *Template Library*)

Sponsorship Clearance Form (access in *Etrieve*)

History / Revisions

Date	Action
2022-04-04	<i>Procedure Approved by Director, Advancement:</i> Procedures for Sponsorship Approval

Schedule A

Sponsorship Clearance Form

Click here to access this form in Etrieve

Introductory Message:

Okanagan College recognizes that some of its activities provide potential sources of revenue and other non-financial benefits through legitimate and worthwhile sponsorship and fundraising opportunities. It is also necessary to recognize that the College is a public institution, and its reputation, independence, students, and employees must be protected.

Okanagan College is sensitive to the impact that advertising, promotion and the sale of merchandise may have on College facilities, students and employees. All sponsorships must endeavor to meet the needs of students and the College to help advance the College's mission. All sponsorships should align with Inspire - Okanagan College's *Strategic Plan* and take account of the College's duty of care to students. It is important for the continuity of the relationship between the College and Sponsors that sponsorship arrangements follow consistent protocol.

To assist you with your sponsorship while ensuring the guidelines set out in the Sponsorship Policy are maintained, please review the College's *Sponsorship Policy* and *Procedures for Sponsorship Approval* prior to submitting your request.

Contact Information:

- Name (Sponsorship Lead):
- Employee ID:
- Department:
- Phone:
- Email:
- Dean/Director Name:

Event, Activity, or Initiative Information:

- Name of Event/Activity/Initiative:
- Description - *Briefly describe your event / activity / initiative and what it intends to accomplish in 2 to 5 sentences. Examples: team/student travel, infrastructure, academic project, etc.*
- List other department(s) or group(s) responsible for coordination of the event / activity / initiative (optional):
- Proposed start date:
- Proposed end date:
- Location(s):
- What audience is your event / activity / initiative targeting? (*Check all that apply*):
 - *Students, employees, community, other – text box*
- Anticipated audience size (reach, attendees, participants, or foot-traffic):

Proposed Sponsors

Due Diligence

It is your responsibility as the Sponsorship Lead to confirm that the sponsorship would not compromise the College's independence, and that sponsors align well with *OC's Inspire Plan* (values, commitments and responsibilities), any specific program focus, and our duty of care to students. When researching a potential sponsor, look at publicly available information (company website and media stories for example) on business interests and activities, related businesses, questionable or unknown sources of wealth/investments, public scandals, and consider: any known legal, financial, ethical issues which would jeopardize the College's standing and reputation. Even unsubstantiated reports may present a potential risk which means entering the relationship may not be in the College's best interests.

Sponsor	Existing Relationship	Alignment with Inspire – OC's Strategic Plan	Alignment with program goals, if applicable	Alignment with duty of care to students
Name	Y/N/Unknown	Drop down of values, etc. or Yes/No	Yes / No / NA	Y/N

If you answered "No" to any of the Alignment questions, please explain for the sponsor(s) here:

Sponsorship Plan

Is there a developed sponsorship plan that outlines the following information?

- Sponsorship Opportunities – sponsor levels, request, proposed value amounts, proposed sponsors and restrictions
 - **Yes** – please attach your sponsorship plan using the paperclip icon below the form
 - **No** – complete the Sponsorship Opportunities Table below
- Sponsorship Recognition – digital, print, in-person, naming (asset, program, space)
 - **Yes** – please attached your sponsorship recognition plan using the paperclip icon below the form
 - **No** – complete the Sponsorship Recognition table below

Sponsorship Opportunities - Restrictions to note:

- *Sponsors may not sell or solicit to staff or students to enter into contracts for materials, products or services at events, however with written permission contact details may be collected for post-event follow-up.*
- *When promotional materials are being provided to students or employees, the Advancement Office retains the right to review and approve those materials in advance of distribution.*

Sponsorship Recognition - *Graphic Standards & Recognition Guidelines:*

- Sponsor logos are limited to College assets (physical and digital) related to the specific sponsorship event/activity/initiative.
- Sponsorship Leads should not commit to include sponsor logos and names on any other College assets (physical or digital) without prior consultation with Advancement.
- Refer to the College's **Naming Policy** for guidelines on naming assets and discuss further with Advancement.
- Okanagan College may provide the Sponsor with the Okanagan College marks in EPS, PNG or JPG formats for use. For more information, please refer to the **Graphics Standards Manual**.

Note: A sponsorship value matrix is under development to support consistency of sponsorship levels across OC.

Sponsorship Opportunities

Sponsor Levels	Request (value of cash or In-kind Items)	Proposed Sponsor(s) <i>Identify key prospects for each level, where known</i>	Permitted or restricted Sponsor Activities, if applicable
<i>Title Sponsor</i>	\$5,000	Bank of Happy Town, or ABC Jet	<i>May distribute promotional material. Speaker at the event May not sign-up students for new accounts</i>
<i>Beverage Garden Sponsor</i>	\$3,000 or Wine for 500 people	123 Wine World, Buddy Auto Dealers	<i>May distribute promotion material</i>
<i>Refreshment Booth Sponsor</i>	500 logoed water bottles	Kid Ski Mountain	

Sponsorship Recognition

Sponsor Levels	Digital Recognition	Print Recognition	In-Person / Live Recognition	Naming Recognition (asset, program, or space) Include duration of naming rights
<i>Title Sponsor</i>				

Sponsor Levels	Digital Recognition	Print Recognition	In-Person / Live Recognition	Naming Recognition (asset, program, or space) Include duration of naming rights
<i>Beverage Garden Sponsor</i>				
<i>Refreshment Booth Sponsor</i>				

Budget

Please attach a detailed budget outlining the revenue sources (sponsorship, ticket sales, etc.) and expenses related to this event/activity/initiative. Use the paperclip icon below the form.

Additional Comments (Optional)

Closing Message:

- Your submission has been sent to your Dean / Director and once approved, will be received by the Director of Advancement for review. You will receive feedback and/or approval on your sponsorship request within ten (10) business days of receipt by the Advancement Office.