



SPONSORSHIP POLICY

Policy Area:	Administrative		
Policy Number:	SPNPL_2204N_AD/ADV		
Policy Sponsor:	Director, Advancement		
Policy Contact:	Director, Advancement		
Stakeholders:	Employees, Students, and Affiliated Organizations or Individuals		
Authority:	<i>College and Institute Act</i>		
Approval Authority:	Executive Team		
Approval Date:	April 6, 2022		
Effective Date:	April 7, 2022		
Replaces or New:	New		
Last reviewed:	April 2022	Scheduled review date:	April 2027

Procedures: *Procedures for Sponsorship Approval*

1. Policy Statement

Okanagan College welcomes Sponsorships from individuals, organizations and other sources. Sponsorships generate financial support to advance the College’s Strategic Plan while also providing strategically important marketing opportunities to potential partners of the College.

2. Purpose

2.1 The purposes of this policy are to:

- a) establish the framework and guidelines to ensure coordinated messaging and requests for Sponsorships for the College;
- b) provide principles to guide the creation of productive Sponsorships and associated partnerships between the College and the private sector, i.e. Sponsorship alliances with corporations, foundations, individuals and other non-government organizations;
- c) provide guidelines for Sponsorship acceptance; and
- d) define the roles and responsibilities for the administration of Sponsorships.

3. Scope and Application

- 3.1 This Policy applies to all forms of Sponsorship where the Sponsor agrees to contribute, either financially or in-kind, to Sponsorship opportunities at the College in return for recognition, public acknowledgement or publicity, or other promotional consideration specific to the sponsored College activity or asset, including for example:
- a) events
 - b) limited-term projects or competitions
 - c) infrastructure, materials and equipment
 - d) groups (such as Okanagan College student teams)
 - e) academic initiatives (such as lecture series, capstone projects)
- 3.2 This Policy 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.
- 3.3 Independent entities affiliated with Okanagan College or using Okanagan College's name are encouraged to adhere to the Principles outlined in this Policy. Such organizations are legally distinct from the College and as such will contract for their own Sponsorships outside of this Policy framework. The College will work collaboratively with these organizations to ensure coordination and alignment where appropriate.
- 3.4 Where the College is sponsoring an activity of an external organization, the principles of this Policy apply.
- 3.5 This Policy does not apply to:
- a) "Philanthropic donations", "gifts", "or "charitable donations" to the College, where (i) a gift of money or other property is irrevocably and voluntarily given to the College, without any expectation of advantage to the donor or third party designated by the donor; and (ii) any donor recognition/publicity for the donor is very limited in keeping with *Canada Revenue Agency guidelines for charitable donations*.
 - b) "Sponsored research" or "research contracts" or "Sponsored Chairs", where the research concerned is under the purview of the President, Provost and Vice President Academic, or Vice President Students, as appropriate.

4. Definitions

Donation or Gift

Means the Canada Revenue Agency definition of donations or gifts as a voluntary transfer of cash or property made without expectation of any benefit or return of any kind accruing to the donor or any individual or organization designated by the donor. Donations and gifts are eligible for an official charitable donation receipt in accordance with Canada Revenue Agency rules.

Donations or gifts may include: cash or cash equivalents, or gifts-in-kind of personal or real property, either as outright donations or deferred donations through planned gifts (for example, wills, life insurance policies, charitable gift annuities, charitable remainder trusts, gifts of residual interest, etc.).

Due Diligence	Means the research concerning a potential Sponsor's operations, projects, background and reputation in order to determine whether the potential Sponsor meets the requirements set out in this Policy.
Fundraising	Means the broader process of soliciting donations and/or Sponsorships and includes charitable donations and gifts-in-kind donated for programs or events. Fundraising excludes grants from government granting agencies, such as any Tri-Council or other federal granting agencies, Pacific Economic Development Canada, supplier/vendor relationships or contractual business or partnership arrangements.
Sponsor	Means the party to a contract with the College for a Sponsorship.
Sponsorship	Means a marketing oriented contractual arrangement between the College and a private sector partner (such as a corporation, organization, foundation or individual), where the private sector partner contributes resources (monies and/or in-kind resources [goods or services]) to an event, program or a project and receives a benefit (e.g. marketing or advertising opportunities) from the associated publicity. The Sponsor does not share in the profits or underlying risks of the project. Funds provided to the College through Sponsorships are not eligible for charitable donation receipts in accordance with Canada Revenue Agency rules. A Sponsorship is not a donation.
Sponsorship Agreement	Means an agreement detailing the specific performance of work and contractual obligations of the Sponsor and the College.
Sponsorship Clearance Form	Means the form completed by the Sponsorship Lead summarizing the activity or event and proposed Sponsors and submitted for review and approval to the Director of Advancement.
Sponsorship Lead	Means the coordinator, or designate, of the proposed event, program, or project that will benefit from a Sponsorship.

5. Principles

- 5.1 The following are the fundamental principles that guide the College's acceptance of Sponsorships:
- The Sponsorship must align with the College's Strategic Plan.
 - The Sponsorship will not influence any academic or business decisions of the College;
 - Association with the Sponsor must not jeopardize the financial, legal or moral integrity or adversely impact the College's standing and reputation in the community;
 - The Sponsorship must be consistent with College policies;
 - The Sponsorship must align with the College's duty of care to students;
 - The College does not endorse the materials (e.g. products, services or ideas) of any Sponsor used in connection with the Sponsorship;

- g) Benefits to Sponsors shall be commensurate with the level of financial and/or in-kind support received by the College from the Sponsor;
- h) 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; and
- i) Sponsorships shall generally be non-exclusive; however, limited forms of exclusivity may be granted on a case-by-case basis provided the associated risks and benefits to the College are commensurate with the exclusivity.

6. Roles and Responsibilities

Sponsorship Due Diligence and Approvals

- 6.1 The Sponsorship Lead shall conduct an appropriate Due Diligence to be reasonably assured that the potential Sponsor is of sound reputation and that the Sponsorship complies with this Policy.
- 6.2 All Sponsorship relationships with the College, regardless of value, must be identified by the Sponsorship Lead and recorded with the College's Advancement Department for information purposes to support the prospect clearance and coordination process and to encourage a donor-centered approach to all revenue generation.
- 6.3 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.
- 6.4 Sponsorships will not be permitted when the proposed activity would be in competition with an existing or planned educational or service offering, or contracted business operation of the College.
- 6.5 The Director of Advancement may seek advice from the Executive Team regarding potential concerns with the opportunity if the Director deems the opportunity to be of sufficient risk while still in alignment with the Policy.

7. Administration

Sponsorship Agreements

- 7.1 Sponsorships in cash or in-kind will be embodied in written contractual agreements between the College and the Sponsor.
- 7.2 Sponsorship Agreements will be approved in accordance with the Signing Authority Policy.
- 7.3 Where appropriate, Sponsorship contracts or letters of agreement for more specialized or complex Sponsorships will be developed in consultation with the Director of Advancement and the appropriate Vice President.

Constraints

- 7.4 The Advancement Department is not responsible for coordinating events or initiatives involving Sponsorships but will assist in seeking Sponsorships where possible.
- 7.5 The College's *Facility Rental Policy* on the use of campus facilities will apply when a Sponsor requests the use of campus facilities as part of a Sponsorship.
- 7.6 Sponsorship does not provide the Sponsor with the right to use the College's name, trademark, or logo unless the use is permitted under the Sponsorship agreement.

- 7.7 Third party branding, advertising, promotion, merchandise sales or services are generally not permitted on College property or asset (digital or physical), except as approved through a Sponsorship agreement for a specific event or initiative, or as a business alliance contract negotiated by the College's Facilities & Business Services.
- 7.8 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.
- 7.9 In order to enhance the nature and appeal of some events or activities, (e.g. Career Fairs, PowWows) the College may invite some external organizations (typically non-profit, small independent crafters. etc.), to contribute displays, booths, or products for sale on a very limited basis. Such contributions will not constitute Sponsorships.
- 7.10 Sponsorships that involve a naming opportunity must follow the approval process in the College's *Naming Policy - Buildings, Facilities and Other Physical Assets*.

8. Related Acts and Regulations

Canada Revenue Agency guidelines for charitable donations and sponsorships

9. Supporting References, Policies, Procedures and Forms

Code of Ethical Practices Policy

Facility Rental Policy

Naming Policy – Buildings, Facilities and Other Physical Assets

Sponsorship Agreement (on Moodle)

Sponsorship Clearance Form

Signing Authority Policy

History / Revisions

Date	Action
2022-04-04	Approval by Executive Team: Sponsorship Policy