



OFIS Sponsorship Policy
Drafted – January 2017

Definition

Sponsorship is a business relationship between two organizations. In this case it is between OFIS and traditionally corporations but it could also be extended to other organizations. These corporations or organizations look for marketing and community relations opportunities in exchange for money, products or services, and they want corporate recognition for their involvement.

Purpose of Policy

1. Set out the criteria and decision making process for sponsorships of OFIS activities.
2. Balance the OFIS reputation management with revenue generation.

Overall Policy

OFIS may solicit and accept sponsorships for events, programs and operations within the terms outlined below. Sponsorship monies are deemed a desirable form of revenue diversification which allows OFIS to keep membership dues low and event fees affordable while contributing to the operational funds of the organization. OFIS may consider in kind and monetary sponsorships. Note, OFIS will not be issuing charitable tax receipts in return for sponsorship funding.

Decision Process

The OFIS Board of Directors is ultimately accountable for the sponsorship policy and for approval of individual sponsorship agreements. However, successful sponsorships are based on relationships. OFIS staff shall be free to solicit, accept and negotiate most sponsorships without delay of taking decisions to board. The decision process is therefore divided into two types:

1. Sponsorships limited to events or single program actions totalling no more than \$10,000 and in full compliance with the sponsorship policy.

The decision is delegated to the Executive Director or appropriate committee chair(s).

2. Sponsorships of any size involving exclusivity, a length of three years or more, an amount exceeding \$10,000 or any doubt about compliance with sponsorship policy.

The Board of Directors, using its normal decision process, makes the decision, and its decision is final. Sponsorships shall be recommended to the Board by staff. All sponsorships shall be reported to the OFIS

Board, within regular event reporting or status reports, so that a database can be maintained and potential major sponsors identified.

Who to Accept

Only reputable individuals and organizations whose image, product or services do not conflict with OFIS' mission or values may be considered as sponsors. There is no obligation to accept any sponsorship offer. OFIS' long term reputation and credibility always takes precedence over short-term monetary needs.

OFIS may enter into discussions with any government or crown agency with jurisdiction in Canada, or OFIS members without the scrutiny noted below for private and non-profit organizations. While each potential sponsorship agreement will be considered on its merits, judgement and discretion will characterize the decision making, the following questions will always be raised:

- Would this association be a good fit with OFIS' image?
- Does the sponsorship conflict with our values?
- Does the sponsorship suit our overall strategy?
- Will this sponsorship help us realize our objectives?

Research on behalf of OFIS, particularly in choosing which organizations to proactively approach, will concentrate on those areas unless the theme of the event or program makes another focus more relevant.

For much small sponsorship, usually linked to an event, it is not unreasonable to research the organization sufficiently to know its values or its record on many possible ethical filters. However, the organization contact shall be asked about likely issues and their responses documented.

A company may be rejected if the corporate representative refuses to answer a potentially relevant question. Not every question need be asked of every potential sponsor, and in many cases none of these questions will be relevant.

The OFIS representative shall preface any questions by noting OFIS, as a membership based, board-governed organization, must withstand extra scrutiny. The questions are asked to fulfill due diligence requirements. If an organization representative is later found to have misled OFIS, OFIS has the right to cancel the agreement. Sponsorship shall be reviewed with more rigor and detail where the risks to OFIS' credibility and integrity are higher, ie multi-year agreements. In such circumstances, information obtained solely from the potential sponsor is rarely sufficient. It may be sufficient in combination with public information - Corporate Social Responsibility standings published in Report on Business or inclusion in Ethical Funds portfolios. If no such public information is readily available, research is required. Any sponsorship question may be raised with the Board between meetings if staff or committee chair wishes to draw on a wider knowledge and perspective available from Board members.

It is unfair to the OFIS volunteers and agents, and to the potential sponsor, to put time into an arrangement which has no hope of acceptance. OFIS will not continue sponsorship discussions with any

organization once that organization, its parent or subsidiaries is found to be engaged in:

- Criminal activity
- Sourcing from slave or child labour

To ensure that OFIS is perceived as an organization welcoming to everyone involved in education and education governance, OFIS shall not enter into sponsorship discussions with organizations that have a primary focus on:

- Party politics
- Religious activities

Confidentiality

It could damage OFIS' reputation if discussions with an inappropriate sponsor became public knowledge. Also, OFIS shall not be the source of any public information about rejected sponsorships. To reduce liability and maintain relationships in case details change in the future, rejections shall be kept confidential. The information will normally be known only to the staff or the committee chair, and the Board if it was involved.

Scope of Sponsorships

Timing:

Program and operational sponsorships may be negotiated for any specified time period. Relationships that are anticipated to exceed three years require a review at least every three years. Event sponsorship may be for one event or a related series of events.

Number and Size:

For small events and specific aspects of OFIS' operations, having only one or two sponsors makes it easier for each sponsor to receive sufficient recognition. Several sponsors shall be preferred for larger events and programs, unless the sponsorship is sufficiently significant to enter into discussing of branding the event or program with a corporate or product name. The total amount eligible for sponsorship shall be based on the full cost of the item including all related overhead. All event and program cash sponsorships shall include a charge of 10 – 15% to be applied to operational costs.

Benefits and recognition

Operational and program sponsors shall be recognized in ongoing ways such as the web site, member communications and literature related to the sponsored program. Recognition is limited to display of the sponsor's name and logo, a few words of description and a link to the sponsor's website. Additional recognition such as the use of product names, banners, advertisements or special promotions shall involve the provision of additional resources to OFIS. OFIS staff and/or Committee chairs shall develop a schedule of fees for such promotion. This schedule of fees shall require Board approval in instances where the fee from any one sponsor exceeds \$10,000. Complete recognition levels for Operational

Sponsors can be found in Appendix I

Event sponsors shall be recognized only in connection with the event, which may include any advance publicity, programs, OFIS web or e-bulletin announcements, event signage, oral thanks etc. Events accepting more than one sponsor may assign recognition levels depending on amount or amount range. This may be done by linking sponsors directly to a portion of the event, - reception or by identifying levels e.g. platinum, gold, silver, and bronze. The OFIS office shall collect information on such recognition levels from organizers to avoid unintentional inconsistencies. OFIS may establish common names and ranges for sponsorship levels with generic benefits applicable to each level of an organizational sponsorship.

Programs and events may be named after sponsors providing 60% or more of OFIS' total related costs including overhead and share of operational costs. Such naming shall always be time-limited and require advance Board approval.

In no circumstance will OFIS become involved in a situation that requires it to endorse a sponsor's product. OFIS shall recognize that members and the general public will assume OFIS has researched its sponsors and decided that the company and its products represent the highest educational and leadership. A prominent disclaimer shall therefore accompany each sponsorship recognition, noting that OFIS thanks its sponsors for their support but does not endorse their products or services.

Sponsors wishing to promote their support of the OFIS may use the name, logo, URL (live linked where possible), in accordance with contract terms regarding advance approval of the specific content and wording from the OFIS. In the absence of a signed contract, sponsors may not use the OFIS name or logo in any public material. Any unauthorized use makes the existing sponsorship agreement void and disqualifies the organization from further OFIS sponsorship until and unless the Board determines that eligibility has been restored.

OFIS will not grant exclusivity extending beyond a single event without a full examination of the benefits to OFIS. Large companies requesting exclusivity must:

- Be funding a minimum of 75% of the total related costs and share to be applied to operational costs.
- Specify the corporate division, if applicable of any exclusivity request.

Promotion

OFIS shall develop a promotional piece outlining why OFIS is a desirable recipient of sponsorship to be kept current and used by staff in contacting potential sponsors. The promotion shall be aimed at organizations wishing to enhance their reputation by supporting a respected provincial education organization and/or wishing to reach individuals with special influence on education and school governance in communities across Ontario. Event organizers and committee chairs may supplement the general piece with the benefits of their program or event - audience size and demographics.

Terms

All sponsorship agreements over \$10,000, and or over three years or that include naming rights shall be confirmed in writing by the Chair of OFIS and co-signed by the sponsor's representative. For sponsorships that do not meet this threshold the agreement will be signed by senior OFIS staff.

OFIS Staff shall draft an agreement consistent with the size and the scope of the sponsorship. In most cases a short letter with sign-back will be sufficient. The agreement shall be directly with the sponsoring company, not any agent or broker.

Even such short agreements shall include a clarification of the planned use of the support, minimum recognition the sponsor shall receive, the need to have any use of each other's logos approved in advance, and the statement the OFIS does not endorse sponsor's products or services. A sample agreement is attached for a short-term sponsorship (Appendix II).

OFIS shall develop a template contract for long-term sponsorships. Sponsorships exceeding a single event or action shall be confirmed by contract. In addition to the items stated above, the contract shall clarify relevant aspects of:

- When the sponsor will provide payment, or make promised in kind goods or services available
- Who the main contact(s) will be for each party
- Any interim or final reporting agreed upon, how the agreement shall be monitored and when reviewed.
- When the agreement terminates, and how early termination is effected
- Any minimum or maximum amount, and how determined, and any exclusivity commitment
- How any failure to meet commitments will be handled. (e.g. what happens if the event is cancelled)

Update Process

Given changes in societal views and values as well as monetary values, the OFIS Board shall review its sponsorship policy at a minimum of every 24 months.

Approved _____ [DATE]

Appendix I:

Operational Sponsorship Levels

This paper refers to partner or operational sponsorships. These financial contributions are made to enable the corporations to show support to OFIS and to align with an organization that shares similar policies and practices. These funds, less the real cost of the benefits back to the corporation, are considered discretionary money and can be used by OFIS for any purpose within approved budgets and policies. This policy does not cover event/program sponsorships, grants or contribution agreements; funds that are made available to OFIS for specific purposes as specified by the funder

Bronze - \$1000

- Thanked in OFIS fall (back to school) newsletter and once in the online forum
- Standard-sized promotional piece used in the following year's promotional package mailed to over 300 schools

Silver - \$3000

- Permission granted to list OFIS logo on your corporate website for the period of the sponsorship (min 1 year) subject to advance approval of final content and wording
- Your corporate logo/name AND product/service content listed on OFIS website for the period of the sponsorship (minimum 1 year) subject to your advance agreement of final content and wording
- Showcased in OFIS newsletter and in the online forum once per quarter (4 times a year)
- Standard-sized promotional piece used in the following year's promotional package mailed to over 300 schools

Gold - \$5,000 (*best value)

- Your participation as an exhibitor at fall and spring learning days for the period of the sponsorship (minimum 1 year) subject to your advance agreement of exhibition logistics AND an opportunity to address education leaders from across Ontario
- First referral privileges from OFIS during membership inquiries for the period of the sponsorship (minimum 1 year)
- Permission granted to list OFIS logo on your corporate website and other corporate publications for the period of the sponsorship (min 1 year) subject to advance approval of final content and wording
- Your corporate logo/name AND product/service content listed on OFIS website for the period of the sponsorship (minimum 1 year) subject to your advance agreement of final content and wording
- Showcased monthly in OFIS newsletter and in the online forum (11 times a year with 4 times a year including a sponsor submitted article)
- Standard-sized promotional piece used in the following year's promotional package mailed to over 300 schools

Platinum - \$8,000

- A permanent token of acknowledgement to be displayed in your place of business
- Invitation to meet with the OFIS Board to provide direction for the sponsorship program once per year AND a seat on the OFIS professional development working group to plan future professional

development opportunities

- Your participation as an exhibitor at fall and spring learning days for the period of the sponsorship (minimum 1 year) subject to your advance agreement of exhibition logistics AND an opportunity to address education leaders from across Ontario
- First referral privileges from OFIS during membership inquiries for the period of the sponsorship (minimum 1 year)
- Permission granted to list OFIS logo on your corporate website and other corporate publications for the period of the sponsorship (min 1 year) subject to advance approval of final content and wording
- Your corporate logo/name AND product/service content listed on OFIS website for the period of the sponsorship (minimum 1 year) subject to your advance agreement of final content and wording
- Showcased monthly in OFIS newsletter and in the online forum (11 times a year with 4 times a year including a sponsor submitted article)
- Standard-sized promotional piece used in the following year's promotional package mailed to over 300 schools

Visionary - \$10,000

- Sector exclusivity in area of Partner Sponsorships for the period of the sponsorship (min of 1 year)
- A permanent token of acknowledgement to be displayed in your place of business
- Invitation to meet with the OFIS Board to provide direction for the sponsorship program once per year AND a seat on the OFIS professional development working group to plan future professional development opportunities

Your participation as an exhibitor at fall and spring learning days for the period of the sponsorship (minimum 1 year) subject to your advance agreement of exhibition logistics AND an opportunity to address education leaders from across Ontario

- First referral privileges from OFIS during membership inquiries for the period of the sponsorship (minimum 1 year)
- Permission granted to list OFIS logo on your corporate website and other corporate publications for the period of the sponsorship (min 1 year) subject to advance approval of final content and wording
- Your corporate logo/name AND product/service content listed on OFIS website for the period of the sponsorship (minimum 1 year) subject to your advance agreement of final content and wording
- Showcased monthly in OFIS newsletter and in the online forum (11 times a year with 4 times a year including a sponsor submitted article)
- Standard-sized promotional piece used in the following year's promotional package mailed to over 300 schools

Appendix II:

Template for Short-Term Sponsorships

(date)

(sponsor contact)

(sponsor company name and address)

Dear (sponsor contact)

I am pleased to confirm the (sponsor organization) and OFIS will be co-operating in the (event/program). Thank you for agreeing to sponsor this activity by provide in (\$ and/or in kind contribution) by (timing). Your participation will help ensure its success. Your support will be recognized by (insert recognition agreed to). If for any reason (the event/program) does not take place as planned, you will be contacted to discuss appropriate changes. Please continue to discuss any details with (insert [ORGANIZATION] contact name) at (insert contact number). Kindly let us know if you cease to be the main contact person at your company. I am available at (insert contact number) if you wish to talk generally about OFIS or about other sponsorship opportunities. I must confirm that as a sponsor, you will not in any way imply that OFIS has endorsed your products or services and you will seek advance approval for each and any use of the OFIS logo, such as on your website. OFIS will do the same with respect to any use of your logo. After signing below, please send this agreement to (insert [ORGANIZATION] representative) at (insert [ORGANIZATION] email address). Again, welcome to the family of OFIS sponsors. I hope your involvement now is the start of a long and mutually beneficial relationship with OFIS.

Sincerely

(signature) [ORGANIZATION], Event Chair

(Date) (name of sponsoring organization) (signature of representative)