

## Corporate sponsorship guidelines

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Sponsorship is an exciting, dynamic, creative and ever-changing industry. We're lucky to be a part of it. But like all jobs, there are parts that are definitely less sexy than others. At the bottom of this list is the creation of a sponsorship policy. But just because one of the less sexy parts of this job doesn't mean it's optional, because whether you're a sponsor or a sponsorship seeker, there's a strong policy like Giant, a sponsorship safety network that will make your life and your job very easy. Politics versus strategy you need both sponsorship strategy and sponsorship policy. Many organizations on both sides of the equation try to wedge both of them into one document, but this is a mistake. Strategy is your game plan. This is how you are going to achieve your marketing and business goals with different target markets. You can refer to different strategies to achieve different goals or connect with different target markets or different brand lines. Politics is the rules of the game that apply in all objective, branded and targeted countries. It is a short document - usually 4-5 pages - that creates a framework in which your strategies should exist. It is likely to be reviewed every year or two, but it is unlikely that much will change in one year or the next. It must be signed at the highest level of your organization, becoming basically an organizational law. Why corporate sponsors need a policy there are a number of main reasons that corporate sponsors absolutely need a bulletproof sponsorship policy, and many of these reasons are about saving you from the biggest headaches in your work. It defines what sponsorship is and why you do it This is an opportunity for you to make crystal clear that you are doing sponsorship to achieve marketing goals - to change the perception and behavior of your target markets. It's not a donation, it's not about warm fuzzies, it's a strategic marketing investment that should reap the benefits. So here we are. It defines no-go areas If there are types of sponsors that you absolutely cannot do, these would be defined. Note that I said absolutely can not, because there may be circumstances that you would consider some sponsorship, which may, at first glance, seem like a bad idea. Is the winery sponsoring a children's charity? You'd think not, but what about their annual gala dinner? My advice here is to keep this list very short. There are other ways - through this process (see below) - to determine suitability. It outlines the process The largest component of your sponsorship policy is a process plan that new and resuming sponsorships are evaluated, facilitated, formalized, leveraged, managed, and measured. She also in itself a brief rationale for each of the steps. Why, for example, you tend to get a buy-in from a variety of different different before committing? One or two sentences are the rationale for this. What's more, as a justification for any move and you try to turn it into a strategy. This whole piece process is crucial, not only to outline what you do all day - that so much in your company probably don't understand - but also to ensure your whole approach is consistent, objective, and consistent with your great business approach. Below you'll find a couple more reasons that outlining the process will make your life easier. This deters the sponsorship of pet projects One of the most useful results of outlining the process is about pet projects. If you've ever had a senior executive or regional manager spending marketing funds on your favorite team or charity or what you have - without proper evaluation - you know what a headache these white elephants can be. The process outlined in your policy will invite everyone in the company to put potential sponsorship in the funnel at the beginning of the process, but it will require that all of them go through the same rigorous evaluation process. Does it reduce the perceived risk have you ever noticed that everyone thinks they are an expert on sponsorship? And many of them, especially senior management, may want to micromanage the process? It is often driven by the irrational fear that sponsorship is risky. When done well, it's actually one of the least risky of all the media marketing, but a lot of people don't really understand that and think they should control every little decision. When you create a policy, it's all the time telling your entire company that you know what you're doing and look... just LOOK on the rigorous, well thought out, signed-process that those sponsorships go through to charging. Once your colleagues know that you know the rules and they agree that the process is sound, they will back off. And thank God for that. Why sponsorship seekers need a policy These justifications are not much different from the justification for the sponsor's policy, but the benefits to your role and your organization are somewhat different. It defines what sponsorship is and why you do it This is your great chance to say that you just don't do it for money. Other benefits include access to new markets, access to sponsor leverage activities, and value-added sponsors for the fan experience. You should also outline that sponsors do not consider these free money, and that you must meet and exceed their commercial expectations, and behave in a way consistent with any other commercial opportunity they may have. For some organizations this may be obvious, but many organizations - I speak to you of charities, culture and government - this is clear to your entire organization may be the most valuable part of the entire document. It sets out the process as a sponsor of politics, politics, a component of your sponsorship policy will be a process plan by which new sponsors are identified, researched, approached, negotiated, formalized, managed, serviced and updated. It also includes a brief rationale for each of the steps. Curbs the expectation that sponsorship is easy or fast As part of the process, you also need to outline the typical lead-time you need to achieve all the steps leading to the sale. You also have to determine the timing in which your sales window is closed, as continuing sales will make you look desperate and unlikely to be successful or you a realistic price. (For more on this, see How to Get a Fire-Sale Sponsor to Resume at a Realistic Level.) Stops handshake deals (and other counterproductive interventions) Have you ever had your senior executive or board member make a handshake deal with a sponsor? If so, then at least one of the following probably also happened: They sold it too little - maybe even less than it would cost to deliver. They sold a category that you could sell for a lot more money. They sold his buddy at the top of the corporate ladder, but the brand is actually a bad match for you. They promised benefits that you can't deliver, either because you've already promised them exclusively to another sponsor, or because you don't really have that benefit to sell. They sold it at C-level, meaning that this sponsorship dog is now going to be inflicted on a marketing team that doesn't like it, and isn't that fun for you to drive? The policy will make it clear that your expectation from senior executives and/or the board is to provide an introduction and a high level of understanding to potential sponsors and you will take it from there. It defines roles in the federal structure If you have regional or local affiliates, your policy should specifically outline how national sponsorship will be delivered: How are you going to get a buy-in and participate from all regions. What are the expectations in terms of providing benefits to the national sponsor. As national sponsorship income will be divided between the national office and the regions. All of this can be done in many different ways, but consistency is key, so it applies to your politics. It touches your budget It is crucial. You should outline that sponsorship should be evaluated to cover both the cost of the sale and the cost of service, and still have enough profit to put back into your event or program. Many boards and senior executives think, We need \$20,000, so let's raise \$20,000, leaving you nothing with which to deliver sponsorship. (For more information about See the basics of sponsorship pricing.) For non-profit organizations, you should also be absolutely clear that sponsorship is an undistributed means. It doesn't matter which of your programs or events sponsors the sponsor, as long as deliver benefits around this particular investment, you are not required to put money into that particular bank. It's money to cover overheads or whatever money you need, and it's not a business sponsor where the money goes. Making politics easy there is a lot more to sponsorship policy than I was able to cover here. For the more, I suggest you pick up one of these two books: Both of these include the whole process for sponsorship and lots of tools and templates. They also include great sections on policy, including a checklist that will make creating your first project very simple. Do you already have a policy? This can be a great way to double-check you cover everything important. Need more help? If you could use some additional support, I provide sponsorship coaching, sponsorship consulting, sponsorship training. If you are interested in any of these services, please review the materials and find me a line to discuss: Kim Skildum-Reid admin@powersponsorship.com AU: No 61 2 9559 6444 USA: No 1 612 326 5265 Contact Local Resources and Experience Find Stay in the course of the latest non-profit resources and trends by signing up for our free electronic newsletters. Approved by the December 9, 2008 Introduction to the 21st Century, public health will face some of its biggest challenges. If current trends continue, many existing public health problems will be more widespread, from HIV/AIDS and tobacco-related diseases to chronic diseases in our ageing population and domestic and community violence. At the same time, rising costs and cuts in public funds could further jeopardize public health and stretch the public health system. The Canadian Public Health Association (CPHA) should have the financial resources to continue providing high-quality programmes and expand its reach through important new initiatives. To fulfil its mission, the CFA will continue to protect resources from external sources rather than relying on grants and contributions agreements from the federal government. In September 2006, the CPHA Board of Directors approved corporate relations/corporate sponsorship policies to guide CPHA's cooperation with the private sector. This Corporate Sponsorship Policy replaces the document, a document dated September 2006. This policy has been strengthened to describe specific criteria and a review and oversight process to assess potential relationships with legal entities. This policy is designed to protect the mission and integrity of CPHA while supporting the Association's fundraising efforts. This policy was designed with the following considerations: CFA's approaches to authors should be seen as opportunities making friends and public health advocates in the long run. The criteria for review should be reasonable and realistic. Oversight review and oversight process don't be too bulky. Over time, the review process will build a body of knowledge to accept and extort sponsorship. This policy will be revised in a year and then as needed. The reassessment will take into account the CPHA's experience in policy application. It is expected that methods for a more effective review and/or gaps in the criteria or review process will be identified. As a result, the Policy will be amended as needed. The policy applies to all sponsors received by CPHA, requested or unsolicited. Government contributions agreements, grants and contracts, as well as grants from independent foundations are not classified as sponsorship agreements and do not need to be evaluated. Definitions For the purposes of this policy will be defined as: Donation: Free or Charitable Contribution or Gift, usually to a charity or government agency. Statement: Official and explicit endorsement or promotional statement for a product or service of the corporation. Sponsorship: A sponsorship agreement is a business agreement under which a private sector partner undertakes commitments to resources (cash and/or resources per look) to support a particular project or activity, but does not share the profits or underlying risks of the project. The private sector contributes to an event, program or even a capital project and benefits (e.g. specific image and marketing opportunities) from related advertising. Sponsorship can occur when two partners (e.g. CPHA and private sector sponsor) share a goal and usually a private sector sponsor wants visibility. The sponsorship agreement covers specific performance indicators. The sponsor provides resources (e.g. money, staff, products, or services) and receives benefits (such as marketing or advertising opportunities). Note: Sponsorship does not include paid advertising in publications such as the Canadian Journal of Public Health or the CPHA Annual Programs. The general assumptions of the three general assumptions will form the acceptance of all sponsors. To them are: CPHA will request and accept support only for projects and activities that correspond to the mission of the Association. The adoption of sponsorship should contribute to and not hinder the CFA's ability to act in the public interest at any time. The name, logo and other intangible intellectual assets of CPHA must be protected at any time. The initial funding assessment of the Major Determinants in the sponsorship evaluation will be its value and from whom it is received. The proposed dollar amount usually determines the level of the review. Also, regardless of the amount of sponsorship in dollars, high-profile sponsorships that include recognition of the entire Association or can be potentially controversial, review and recommendations of the Corporate The Responsibility Working Group (CSRWG) and the Board of Directors are also reviewing the approval. For small sponsorship (or promotional) opportunities, employees can request a CSRWG review if the question arises whether the values and principles of the sponsoring organization are consistent with those of CPHA. It is expected that all sponsors, especially from the corporate sector, who will sponsor any amount, will comply with the CPHA Corporate Sponsorship Principles (see annex) and the criteria stated in this policy. High Profile Sponsorship All Sponsorship for High Profile, Association of All Recognition, whatever amount must be considered by CSRWG to support sponsor policies and submitted recommendations to the Board of Directors through the Finance Committee. The Board of Directors must review and approve all decisions related to the recognition of potential sponsors of the Association, which are associated with the high-profile recognition of the entire Association to ensure that these decisions retain the credibility and reputation of the Association. Sponsorship valued at \$25,000 or more All sponsorships of \$25,000 or more will be considered by CSRWG for the sponsor's accession to the criteria as stated in this policy. CSRWG will periodically report its findings to the Board of Directors through the Finance Committee. The Finance Committee will make final decisions on the sponsors' commitment to the sponsorship policy of between \$25,000 and \$99,999. The Finance Committee will recommend to the Board of Directors for the Board's final decision on whether to join the sponsor's sponsorship policy of \$100,000 or more. Sponsorship valued at less than \$25,000 All sponsorships under \$25,000 will be raved for the affiliation of the sponsor to the policy by staff applying the criteria outlined in this document, including: Unlimited sponsorships (i.e., sponsorships that are not related to programs or activities); Sponsorship made in support of established CPHA programs or activities; and sponsorships in support of new programs or events. Criteria for reviewing sponsorship in general, the purpose of the review is to determine the balance of benefits to the public in relation to the risks and costs of collaborating with the sponsor. In each case, the following conditions should be taken into account in determining the benefits and risks associated with sponsorship. Do these proposed uses of sponsorship coincide with CFA's mission and priorities? Issues to consider in determining this congruence include: How is the proposed use of sponsorship related to CPHA's mission and priorities? Why does the organization want to sponsor CPHA? How will the benefits derived from the intended purpose of sponsorship be correlated with the CFA resources required to meet the intended objective? In practice fits into the adopted state policy of CPHA? Recognizing that socially responsible practices are the cornerstone of CFA policy and that effective corporate citizenship should embody socially responsible practices, the following issues are included in the issues to be taken into account when assessing the benefits and risks associated with receiving sponsorship from external organizations, especially corporations: the types of basic products or services produced or provided; Note: Sponsorship will not be accepted by tobacco companies, alcohol companies or manufacturers of firearms and weapons of mass destruction. If the sponsoring corporation is part of a corporate conglomerate that has links to tobacco, alcohol or the manufacturer of firearms or weapons of mass destruction, the sponsor corporation and the relationship between the sponsor corporation and the conglomerate will be reviewed. Health and safety conditions where products or services are manufactured; Employment practices, including commitment to diversity and the living wage; Commitment to the environment; Record compliance Marketing and advertising practice; Research and development policies and practices; Human rights record; Relevant sponsor positions in public policy; Record support for public health organizations or public health issues and organizations; Other activities in the past will be weighed in connection with public policy and the public reputation of the CFA. It is recommended that staff be moderately assessed as the prospect is determined or self-named, as in the case of undesirable requests for partnership with the CFA. The assessment will be based on current knowledge, including websites, newspaper reviews and contacts with relevant CFA leaders. CPHA members contacted will be held at the privacy level as it relates to the CPHA's discussion of pursuing potential sponsors until the information is made public. If necessary, CPHA will use the services of EthicScan Canada Limited, a Toronto-based business ethics consulting firm, a corporate responsibility research center, and an educational resource center whose mission is to assist organizations and individuals in more ethical behavior. EthicScan monitors the social, labor and environmental performance of 1,500 companies in Canada. Researched and independently monitored organizations include public and private Canadian corporations, non-governmental companies and foreign multinationals operating in Canada. Analysis of corporate social responsibility includes environmental performance, progressive personnel policy, philanthropy and social responsibilities, sustainability management, military production, sensitive business, gender and family issues, and ethical sources and trade. Are they expectations regarding the control, oversight and results (s) of sponsorship and/or project to which funds acceptable to CPHA apply? As stated in the Corporate Sponsorship Principles, CPHA will only accept funds when CPHA has control over the content of the activities and when CPHA has and maintains full control over all funds. Issues to consider: does the CFA exercise editorial control over the content of educational materials and publications and contribute to their dissemination? Will the CPHA be able to review and approve public statements about the project, its findings and/or its implications? Will CPHA control funds at any time? Are expectations for results, responsibilities, implementation methods and duration of funding feasible and pleasant? (Any special expectations of the sponsor must be clear and documented.) Is the sponsor's expectations for recognition or recognition of their support acceptable to CPHA? As stated in the Principles of Corporate Sponsorship, confirmations will be limited to the company's name, logos, slogans, which are an established part of the identity of the supporter, trade names, addresses and phone numbers. Issues to consider: Is the name of a CPHA affiliated corporation acceptable to a sponsor and a proposed project defined by CPHA? What public recognition awaits the sponsor? Is recognition suitable for the amount of sponsorship? Is there any product endorsement? Will the adoption of sponsorship create any real or obvious conflicts of interest, and will the impact and/or benefits of taking sponsorship outweigh the risks of partnering with the sponsor? When considering the following issues, the CPHA recognizes the need to adhere to its principles and weigh the benefits and risks of taking sponsorship from a sponsor rather than weighing the only option of not accepting the actual dollar sponsorship. Issues to consider: Are there any personal, financial or professional benefits for employees, CPHA members or other volunteers who create a conflict of interest? What is the impact of sponsorship and benefits on public and public health? Does the image of the sponsor or distract from the CPHA? Do the consequences and/or benefits outweigh the risks of collaborating with a potential sponsor? The CSRWG sponsorship review process must consist of four (4) members of the Finance Committee and two additional members of the Association. With a sponsorship of \$100,000 or more, the recommendations will be sent to the full board of directors for final approval. CSRWG and the Board of Directors will apply the criteria and procedures described in this document to assess sponsorship. The role of the CSRWG Corporate Social Responsibility Working Group (CSRWG) of the CSRWG Finance Committee will be For: Consideration of all sponsors of \$25,000 or more to ensure that sponsors meet the policy criteria; A final decision to join the sponsor's sponsorship policy of \$25,000-\$99,999; submission to the Full Board of Directors through the Finance Committee of the results of the sponsorship review of the amount of \$25,000-99,999 and recommendations for the Board to consider a sponsorship of \$100,000 or more; Consideration of all sponsors who ensure broad acceptance and recommendations to the Council; Identify more effective review procedures and/or gaps in the process; and a proposal to the Board of Directors to make policy changes. Sponsorship reviews can be made through conference calls or emails. If CSRWG cannot reach a consensus, a majority vote will be the final decision (on sponsorship of \$25,000-\$99,999) or a recommendation to the Board of Directors (on sponsorship of \$100,000 or more). Note: In order for the review process to support resource development efforts, the process may need to be initiated before the final sponsorship negotiations are completed. In such cases, CSRWG will be asked to make a fact-based recommendation and apply a decision to expedite the final recommendation as the negotiations are completed. The Role Board of Directors Of the Full Board of Directors will receive a CSRWG report for sponsorship of \$25,000-\$99,999 and consider CSRWG's recommendations in making a final decision on all sponsorships of \$100,000 or more. In the event that the Council could not reach a consensus, the final decision would be taken by a majority vote. The Board of Directors will make final decisions on the proposed policy changes based on CSRWG recommendations. It is important that there is enough time for review to ensure that staff have time to prepare materials for CSRWG and conference calls to be held. At the same time, it is imperative that the review process be completed effectively and expeditiously. It is recommended that this process be completed within a six-week period. Documentation All CSRWG reviews of sponsorship opportunities should be documented. More detail should be given to documenting difficult decisions, especially those where consensus has not been reached. Staff must prepare statements for the sponsor and the Board of Directors on the agreed use of funds and report results for both limited and unlimited sponsorship. A general, positive statement is recommended for unlimited sponsorship, for example: CPHA will put funds for use to improve public health and to further our mission. CPHA also agrees to provide periodic updates to the sponsor describing how the funds are used. Staff must fill out statements for The Board of Directors of Sponsorship that does not require formal consideration, for example: CPHA has received \$US from the X Foundation for Y activities; this is in line with CPHA's sponsorship policy. The criteria and mechanism for expedited sponsorship reviews are below \$100,000, from previously approved sponsors, to support approved or established projects, and in which there are no emergency obligations or provisions that can be expedited. In these circumstances, review materials may be faxed or emailed to all CSRWG members with a short term. Multi-year sponsors, for many years, must be evaluated by CSRWG on an annual basis to ensure that the criteria are still met, in particular that risk/benefit analysis requires continued relationships. This process must be documented. Changes in THE evaluation of CSRWG sponsorship will be sent to the Board of Directors for consideration. Third-party sponsorship granted by a third party for CPHA activities or activities that are affiliated with or disclosed as a CPHA function must comply with CPHA principles for corporate sponsorship and corporate sponsorship policy. CPHA staff should be informed of the original source of the sponsorship, its purpose and how sponsorship will be encouraged. If the sponsorship is above the \$25,000 level, the review will be conducted by CSRWG. Sponsors are encouraged to recognize sponsors publicly. To ensure that CPHA sponsors are recognized consistently and appropriately within the program, guidelines have been developed. As stated in the Principles of Corporate Sponsorship, confirmations will be limited to the company's name, logos, slogans, which are an established part of the identity of the supporter, trade names, addresses and phone numbers. CPHA will not provide product approval. The following policies apply to the recognition of sponsors in print and electronic media. The name CPHA and/or logo should appear first and be of equal or larger size than sponsors. The name and/or CPHA logo should be as visible as the sponsor's name and/or logo. Sponsors must be listed in alphabetical or alphabetical order within sponsorship ranges. It is proposed that variations on the following formulation be used as an opening statement for the list of authors: CPHA gratefully recognizes the support received for xyz from the following participants Of the Role of Personnel Director of Communications and Development, in consultation with the senior management team and with ultimate responsibility, falling to the CHIEF Executive Officer or her/his appointed, is responsible for: the consideration of the sponsor under \$25,000; Making a final sponsorship decision of less than \$25,000, background and affiliation sponsors prospects in a reasonable reasonable. Determining whether CPHA's core policies are related to sponsorship or sponsor. Cost/results/financing analysis; Filling out documentation for considerations and recommendations/solutions to CSRWG; Filling out documentation of each sponsorship's obligations and obligations. Filing in periodic results and accountability reports; Annual compilation and provision to the Board of Directors and the public disclosure of a list of all CFA sponsors; and the annual compilation and provision to the Board of Directors of a detailed report on the cost, benefits and impact of each sponsorship completed in the previous 12 months. The principles of the CPHA Corporate Sponsorship Application will focus on goals consistent with its strategic priorities and will comply with the following Corporate Sponsorship Principles in attracting all sponsors. These principles will be discussed with all sponsors in the early stages of the discussions. The principles of commercial support or sponsorship of CPHA will always remain independent on public health and issues. CPHA will request and accept support only for projects and activities that correspond to the Mission of the Association. CPHA will only accept funds for information and education activities when content must be determined or verified by the CPHA or an independent public health professional body appointed by CPHA. CPHA will maintain full control over all funds provided by commercial supporters for educational activities. CPHA does not allow commercial products to be advertised as part of continuing education activities. CPHA's policy is not to provide approval for products or services. Confessions for commercial support will be limited to the company's name, logos or slogans, which are an established part of the supporter's identity, trade names, addresses and phone numbers. CPHA's intangible intellectual assets, including the Association's name and logo, will be protected at any time. Sponsors are not allowed to use the CPHA name or logo for commercial or commercial purposes or in connection with the promotion of any product. CPHA will be vigilant at all times to avoid any real or obvious conflict of interest in accepting sponsorship. Any situation that may be an exception to this policy or these principles will be reviewed by the Chief Executive Officer in consultation with the Chairman of the Board of Directors. Together, they must interpret this policy in good faith. Faith. toyota corporate sponsorship guidelines

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