

Original Approval Date: January 25, 2016

Most Recent Approval Date: August 20, 2019

Parent Policy: [Reputation and Relationship Management Policy](#)

Sponsorship Procedure

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| Office of Administrative Responsibility: | University Brand and Marketing – University Relations |
| Approver: | Vice-President (University Relations) |
| Scope: | Compliance with this University policy extends to all academic, support and excluded staff, postdoctoral fellows, and academic colleagues as outlined and defined in the Recruitment Policy (Appendix A and Appendix B: Definitions and Categories); undergraduate, graduate and Faculty of Extension students; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers. |

Overview

Sponsorship activities offer opportunities to build and reinforce relationships with external communities, particularly the business community, as well as, to diversify university revenue sources. In seeking or accepting sponsorships from non-university entities, the university recognizes that external support of its events, programs and activities in the form of sponsorship offers sponsors broad access to various audiences, and that access to such audiences is a valuable asset. The university also acknowledges that there is an inherent value to the sponsor in a visible relationship with a top Canadian research-intensive university. Finally, the university acknowledges that as a public university that serves the public good, its reputation is a valuable asset. To protect the image, identity and reputation of the university, sponsorship activities must be consistent with the university's mission and values.

This procedure applies to all sponsorship recognition of individuals or organizations

- on all leased and/or owned university property,
- at university events,
- of programs or groups (e.g. athletic teams), or
- in all university media (print or digital).

Purpose

Establish a framework and guidelines for the creation of appropriate and productive partnerships between the university and its sponsors (e.g. corporations, foundations, individuals and other non-government organizations). This procedure brings consistency in sponsorship recognition and practice, and proper reporting of sponsorship revenues.

PROCEDURE

In consideration of a sponsorship, the following principles must be followed:

- The sponsorship enhances the public image of the University of Alberta, and its reputation and standing. There should be no more than a minor risk that acceptance of the sponsorship may harm the university's reputation, due to the sponsor's identity or the identity of its affiliates. Before approving a sponsorship, University Brand and Marketing will carefully consider the possible conflicts with the university's mission and values.

- There is no real or perceived **conflict of interest, conflict of commitment** or **institutional conflict** between the sponsor and the university.
- The specific sponsorship that is proposed, including monies, in kind services etc. must **benefit** the university and the sponsored event.
- The sponsorship benefits to be received by the sponsor correspond with the level of benefit which is received by the university from the sponsor.
- Sponsorship opportunities are to be non-exclusive; the university does not favour a sponsor in a particular industry sector to the exclusion of its competitors when approaching sponsors. In the event that the university wishes to offer an exclusive sponsorship, such as an exclusive media sponsorship, all risks should be considered and the benefits to the university must be commensurate to the exclusivity.
- The sponsor allows the university to use the sponsor's trademark in association with the sponsored event. The university does not grant a license of its own trademarks (which include the name and the logo) to a sponsor either in association with the sponsored event or for any other purposes of or uses by the sponsor.
- The following table outlines the various responsibilities and tasks required when considering a sponsorship:

| | Single Sponsorship under \$5,000 | Single Sponsorship \$5,000 or more | Total Value of all Sponsorship campaigns of \$10,000 |
|--|---|---------------------------------------|--|
| Unit submits sponsorship request form to University Brand and Marketing prior to approaching potential sponsors and at least one month before event. | No but encouraged to consult at the faculty-level | Yes | Yes |
| Approval required by the Office of the University Brand and Marketing | No | Yes | Yes |
| Signing Authority | Relevant Dean or VP (or delegate). For University-wide sponsorships: VP University Relations – agreements are sent to University Brand and Marketing. The signatory has responsibility for sponsorship acknowledgement and contract stewardship. Faculties are encouraged to choose a single designate for all sponsorships. | | |
| Acknowledgment and Stewardship | Relevant Dean or VP. For University-wide sponsorship: VP University Relations | | |
| Sponsorship Agreement Required | encouraged to consult at faculty-level | Yes | only for individual contracts over \$5,000 |
| Other Documentation Needed <i>(in case where no Agreement)</i> | Yes [any material or correspondence] | N/A | |
| Issuing of Business Receipt | Recipient units are responsible for receiving (depositing), recording and receipting sponsorship payments. | | |

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| Inclusion of Sponsorship for fundraising counting purposes | Office of Advancement. Please send copies of Sponsorship Agreement, Copies of Deposit and journal entry coding to RecSec@ualberta.ca for inclusion in fundraising totals. |
| Approval of sponsorship signage, logos, and other relevant marketing material | University Brand and Marketing All sponsorship related signage, including digital signage, should be approved in advance by University Brand and Marketing. The signage is consistent with the relevant university policies and procedures. |

LIMITATIONS AND RESTRICTIONS

- The university reserves the right to accept or reject sponsors based upon alignment with the university's mission and values. The university will use its discretion in making such assessments. Sponsorships are available for approved university purposes only.
- This procedure is not meant to apply to philanthropic naming opportunities; these should follow the naming policy.

DEFINITIONS

Definitions should be listed in the sequence they occur in the document (i.e. not alphabetical).

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| Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. [▲ Top] | |
| Sponsorship | A non-university entity provides funding to the university and, in return, receives advertising or promotion of its brand, products or services (or an equivalent benefit). * This definition has been adapted from the CRA definition. |
| Conflict of Interest | A situation in which there is or may be perceived to be a divergence between the private financial benefit or financial interest or personal benefit of a person, family member, or an outside party, and that person's obligations to the University, such that an impartial observer might reasonably question whether related actions to be taken or decisions made by the person would be influenced by consideration of the person's own interests. |
| Conflict of Commitment | A situation whereby the external or personal activities, undertakings or relationships of a person are so demanding or organized in such a manner or are otherwise such that they may interfere with the person's obligations to the University or to others or institutions that are separate from the University but to whom the person owes an obligation because of their relationship to the University. |
| Institutional Conflict | A situation in which the University, or an institution, has an existing relationship with a party with which the University or the institution proposes to enter into an activity such that an impartial observer might reasonably question whether the existing relationship might prejudice |

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| | decisions of the University or an institution with respect to the activity. |
| Benefit | Any item or service provided to a sponsor in return for the sponsorship of a University activity, event, or program. Examples may include, but are not limited to, recognition/acknowledgment, event tickets, food and beverages, merchandise, or access to University services (i.e. meeting rooms, event material, etc.). |
| Total Value of Sponsorship Campaign | Total contribution (sponsorship) for a single event. There may be more than one sponsor for the same event. For example, three sponsors with a value of \$10,000 each sponsored an event. So the total value of sponsorship will be \$30,000. |
| Acknowledgment | Term used to signify the recognition of sponsorship support. Typical acknowledgment may include logo placement and/or sponsor information in the materials associated with a university event or activity being supported by the sponsor. |
| Donation | Term defined by Canada Revenue Agency as a voluntary transfer of cash or property to the university that is made without expectation of any benefit of any kind accruing to the donor or any individual or organization designated by the donor. A donation is eligible for an official charitable donation receipt issued by the Office of Advancement. |

FORMS

Should a link fail, please contact uappol@ualberta.ca. [[▲Top](#)]

[Sponsorship Request Form](#)

[Sponsorship Agreement Template](#)

RELATED LINKS

Should a link fail, please contact uappol@ualberta.ca. [[▲Top](#)]

[CRA](#)

[Counting Practices for Philanthropic Support Procedure](#)

[Donation Acceptance policy](#)

[Financial Services Guide: General financial information: sponsorship revenue](#)

[Contract Review and Signing Authority Policy](#)

[Trademarks and Licensing Policy](#)

[Naming Policy](#)

[University Mission](#)