

SPONSORSHIP

Policy # **2142**
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Type of Policy: BOARD DISTRICT FIRE PARKS

POLICY

2142.1 It is the policy of the Cosumnes Community Services District (“District”) to actively seek sponsorships for its events, fire services, recreation programs, parks, and facilities from foundations, corporations, non-profit organizations, service clubs, and other entities that meet, enhance, or further the mission and vision of the District.

PURPOSE AND SCOPE

2142.2 To establish guidelines that govern the approval of sponsorship agreements involving District services and assets. This will help potential sponsors understand the opportunities and constraints of sponsorship.

This policy is not applicable to gifts, grants, or unsolicited donations in which no benefits are granted to the donor and where no business relationship exists.

2142.3 This policy applies to all District elected officials, executives, employees, interns, volunteers, contractors, vendors, suppliers, members of the public, and other persons who participate in District programs and services.

APPLICATION

2142.4 Definitions:

- a. Sponsorship: A mutually beneficial business arrangement between the District and a third party, wherein the third party provides cash and/or in-kind services to the District in return for access to commercial marketing potential associated with the District. Marketing partnerships may include sponsorship of one or more of the District’s programs, projects, events, facilities, or activities.
- b. Sponsor: A third-party such as an individual, foundation, corporation, government agency, non-profit, for-profit, service clubs, etc.
- c. Sponsorship Agreement: The legal instrument that sets out the terms and conditions that parties have agreed to.
- d. Sponsorship Criteria and Assessment Checklist: The District’s criteria for determining if a sponsor meets the requirements of this policy. The checklist is attached to this policy and may be amended from time to time by the General

Manager or designee.

- e. Designated Authority: District staff who have the authority to enter into a negotiation with prospective sponsors.
- f. Recognition Benefits: Opportunities are given to the sponsor to have its name/logo appear on District property or materials for a specific period as specified in the sponsorship agreement.

2142.5 Sponsorships allow the District to maintain and enhance the delivery of core services beyond the levels funded from the District's current revenue sources.

In appreciation of such support, the District will provide sponsors with suitable acknowledgment of their contributions. Recognition of support will adhere to the aesthetic values and purpose of the Districts parks, facilities, and services. Recognition shall not detract from the visitor's experience or expectations, nor shall it impair the visual qualities of the site or be perceived as creating a proprietary interest.

2142.6 The following principals form the basis of the District's consideration of sponsor proposals:

- a. The mission of the sponsorship organization should not conflict with the mission, vision, values, and goals of the District and its Departments, or any formal policies or proclamations of the Board.
- b. Sponsorships cannot be conditional on the District's performance.
- c. Sponsorships should provide a positive and desirable image to the community.
- d. Sponsorship benefits offered should be commensurate with the value of the sponsorship.
- e. Individual sponsors should not limit the District's ability to seek other sponsors.
- f. Recognition benefits to be offered do not compromise the design standards and visual integrity of District property.
- g. An evaluation of the potential sponsor and its proposal will include, but not be limited to the following:
 - 1. Products/services offered.
 - 2. Organization's record of involvement in environmental stewardship, social responsibility, and history of involvement in the community.
 - 3. Principles of the organization.
 - 4. Sponsor's rationale for its interest in the District.

5. Sponsors expectations.
6. The operating and maintenance costs associated with the sponsorship.
7. Sponsor's timeliness and/or readiness to enter into an agreement.
8. Impact on the community and District customers where the sponsorship is implemented.
9. Impact on the ability of the public to access District property and programs.

2142.7 The District shall not enter into a Sponsorship agreement with any organization that does not further enhance, promote, or support the mission, vision, values, and goals of the District and its Departments, or that presents a potential conflict of interest, which includes, but is not limited to, the following:

- a. Political candidates or political parties.
- b. Activities or products that are restricted, by law, to adults including, but not limited to, alcoholic beverages, tobacco/vaping products, firearms, and/or gambling, except where approved by the General Manager and/or designee for an adult event.
- c. Sexually explicit materials or businesses, pornography, sale of illegal drugs, and other goods/businesses/services inappropriate for promotion to a family audience and/or that are restricted by law, to adults only.
- d. Entities that practice or promote discrimination in employment practices or services on the basis of race, religion, national origin, disability, age, gender, pregnancy, (including childbirth and related medical conditions), marital status, gender identity, medical condition, genetic information, military or veteran status, sexual orientation, or any other protected characteristic under applicable law.
- e. A religious organization, including faith-based organizations or religious programs whose principal purpose is promulgating a particular religious faith, creed or doctrine.
- f. A business or organization engaged in any stage of negotiation with the District unless the contract is directly linked to a marketing sponsorship opportunity.
- g. A business or other entity engaged in litigation with the District.
- h. Organizations that operate or support activities counter to the policies of the District.
- i. Entities that would be a direct competition to the services provided by the Department which manages the event, activity, or property. Exclusions may be

made for competitors sponsoring a regional event or activity which draws attendance beyond District limits.

PROCEDURE

2142.8 These procedures have been established to ensure all sponsors are treated in an equitable and appropriate manner and that in recognizing sponsor's support, the values and purpose of a particular facility or park are not diminished.

2142.9 Sponsorship Categories. Sponsorships are appropriate for the following broad types:

- a. *Event Sponsorship*. Financial or in-kind support for an event organized by the District.
- b. *Park/Facility Sponsorship*. Financial or in-kind support associated with the design, construction, repair, and/or improvement of a particular park or facility.
- c. *Program Sponsorship*. Financial or in-kind support that facilitates the ongoing delivery of a particular District program.
- d. *Project Sponsorship*. Financial or in-kind support of a specific District project, which is usually a one-time effort. Results often include a product being developed for the District and for the public (e.g., Department Master Plan).

2142.10 Types of Recognition. Sponsors will be provided with a level of recognition that is commensurate with their contribution. Off-site recognition may include, but not be limited to: thank you letter, website, social media, newsletter, media releases, fliers, catalogs, guides, etc. On-site recognition may include, but not be limited to temporary signs, which may include the use of logos, and verbally acknowledging the sponsor during the program or event.

2142.11 Process. The process for obtaining sponsorship shall be administered by the District's Designated Authority. The Designated Authority is authorized to enter into negotiation with prospective sponsors.

2142.12 Sponsorships are arranged primarily through two processes: a) self-initiated by the potential sponsor or b) initiated by the District through a formal or informal "RFS" (Request for Sponsors) process.

Interested sponsors are encouraged to contact the District at any time to discuss potential sponsorship by submitting a Sponsorship Opportunities Interest Form. If initiated by the potential sponsor, the procedure is:

- a. Completion of a Sponsorship Opportunities Interest Form.
- b. Meet/speak with District Designated Authority.
- c. Sponsorship agreement drafted with the level of sponsorship and benefits to the District.

- d. Approval by appropriate level.
- e. Complete agreement.

2142.13 The District will work with the Sponsor in creating the sponsorship benefits. The District retains final approval over the content, placement, appearance, and wording of all benefits provided to sponsors.

The District must approve in writing the use of its logos and all other marketing associations by Sponsors for their use. All such uses by the Sponsor must be associated with the specific sponsorship and are prohibited for any other use.

2142.14 Agreement. The District will use current market research data to calculate the value for each tangible and intangible asset offered by the District to the Sponsor. Determining sponsorship costs and values will be a mixture of “value-based” system (e.g. based upon the value of the tangible and intangible marketing and brand benefits to the sponsor) and “cost-based” system, where the goal is to recover at least the costs of an event, program, project or site operations.

Sponsorships shall require an approved sponsorship agreement that contains the following:

- a. Clear statement of how the District is improving services through this funding and how the sponsorship supports the mission, vision, values, and goals of the District.
- b. Clear statement of the District’s and the sponsor’s responsibilities and roles.
- c. Details of the exchange of benefits, including a description of all fees, products, services, in-kind services or other benefits provided to the District by the sponsor, and all marketing rights and benefits provided by the District to the sponsor.
- d. Term and termination provisions.
- e. Signatures by authorized representatives of the District and sponsor.
- f. The level of approval required for sponsorship agreements is based on the amount and complexity of benefits exchanged. Approval includes evaluation by District Counsel of sponsorship agreement for compliance with applicable federal and state tax laws. Signature authority will be based upon the values set forth within the District’s procurement policy.

2142.15 Recognition of Sponsors. The following principles form the basis of the organization’s recognition of sponsors:

- a. Recognition of a sponsor will not suggest in any way the endorsement of the sponsor’s goods or services by the District.

- b. Any physical form of on-site recognition will be done in such a way that it minimizes impacts on the visitor's experiences and visitor use or routine District property operations.
- c. The form of any on-site recognition will be of an appropriate size and color and will be done in a way that minimizes the impacts on District property surroundings or any interpretive message.
- d. The General Manager and/or designee may impose additional subject-matter restrictions on advertising and sponsorship agreements consistent with applicable law and the use of District property by citizens of all ages, in particular young children and families.

2142.16 Termination. The District reserves the right to terminate an existing sponsorship agreement should conditions arise during the term of the sponsorship that results in it conflicting with this policy or if that sponsorship no longer supports the best interests of the District. A decision to terminate shall be made by the General Manager and/or designee in consultation with District Counsel.

2142.17 Ethical Considerations. Sponsorships are an important way in which the District can obtain additional resources to support the pursuit of its mission. However, sponsorships may come with unintended consequences, and, as such, all sponsorship offers need to receive careful consideration.

On occasion, the District may need to reject a sponsorship offer. Circumstances under which this may occur include:

- a. The potential sponsor seeks to secure a contract, permit, or lease.
- b. The potential sponsor seeks to impose conditions that are inconsistent with the District's and its Department's mission, vision, goals, values, policies, and/or planning documents.
- c. Acceptance of a potential sponsorship would create a conflict of interest or policy.
- d. The potential sponsor is in litigation with the District.

2142.18 Monitoring and Reporting. The District Designated Authority will track in-kind and cash sponsorships monthly; data will be reported to the Board annually.

The District Designated Authority will compile and present Post-Event Fulfillment Report to the Sponsor upon completion of the sponsorship agreement. The Post-Event Fulfillment Report will include the following information:

- a. Executive summary of all agreed deliverables.
- b. Attendance figures.

- c. On-site exposure.
- d. Document through photos, samples, and reproductions of agreed marketing.
- e. Copies of ads, media and articles in which sponsor's name or logo appears.

REFERENCES

2142.19 Sponsorship Criteria and Assessment Checklist

SPONSORSHIP CRITERIA AND ASSESSMENT CHECKLIST

The following are key analytical questions that will assist the District in deciding whether or not to pursue a particular Sponsorship and can help in negotiating a formal Sponsorship agreement.

1. Alignment with District and Department mission, vision, goals, values, and policies.

Does the proposed sponsorship:

- A. Support the District mission, vision, and values?
- B. Support the Department's mission, vision, and goals?
- C. Assist the District or Department in achieving Master Plan or Strategic Plan objectives?
- D. Align with District or Department policies?
- E. Align with the District's Commitment to Diversity policy?

2. Benefits to the District, Department, and Public.

Will the proposed Sponsorship:

- A. Increase public access to parks, facilities, or services?
- B. Help meet the needs and interests of underserved and/or diverse populations?
 - a. Will it increase user groups?
 - b. Will it increase the variety of services and programs offered?
 - c. Will it increase the capacity or expand access by diverse user groups?
- C. Improve or enhance the quality of services?
 - a. Physical improvements or added amenities to parks, facilities, etc.? How will these be maintained?
 - b. Increase safety?
- D. Provide other benefits to the public or District?

3. Budget Considerations.

Does the proposed Sponsorship:

- A. Provide a financial benefit to the District?
 - a. Does it bring in additional revenue?
 - b. Reduce operating, maintenance or capital costs?
- B. Compliment efforts by other District or Department partners?
- C. Align with Capital and Asset Improvement Plans?
- D. Leverage existing resources?
- E. Increase or decrease the District's legal liability?

4. Community Relations.

Does the proposed Sponsorship:

- A. Have the potential for controversy?
- B. Have the potential of being perceived as commercialization of District resources without offsetting public benefits?
- C. Require a public involvement process?
- D. Require a marketing or communications plan?
- E. Have the potential negative impact to neighboring communities such as increased traffic, noise, parking, etc.?
- F. Have the potential to adversely impact District resources or result in a significant change of use?

SPONSORSHIP PERFORMANCE ASSESSMENT

At the completion of a sponsorship agreement, the Sponsorship Performance Assessment must be completed by staff. The assessment will capture data to assist staff in completing the Activation Report and determine the potential for future sponsorship agreements with the sponsor.

1. Did the Sponsorship result in expected benefits to the District and/or the public?
2. Were the desired goals achieved? Are there positive, measurable outcomes? Is there data to support outcome achievement?
3. Were staff satisfied with the result of the sponsorship?
4. Were the terms and conditions of the sponsorship agreement between the sponsor and the District met and to the satisfaction of both parties?
5. Did the sponsorship bring in new income?
6. Did the sponsorship achieve revenue and expense reduction expectations?
7. Did the sponsorship result in added short- or long-term costs to the District?
8. Did the sponsorship result in added or decreased liability to the District?
9. Did the District receive any public feedback regarding the sponsorship?
10. Were users supportive, or conversely, gave no substantial negative feedback about the sponsorship?
11. Have overall expectations and goals of District staff been satisfied?
12. Do you recommend to partner again with this sponsor in the future?