

Ontario Healthy Workplace Coalition Sponsorship Guidelines

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Purpose:

These guidelines have been developed to provide the Ontario Healthy Workplace Coalition (OHWC) with best practices for acquiring and managing sponsors and sponsorship arrangements.

Certain questions need to be addressed when soliciting sponsors, assessing sponsorship proposals and negotiating sponsorship agreements, including:

- What if any is the level of risk associated with the sponsorship?
- What is the potential for real or perceived conflicts of interest?
- Should the program accept an unsolicited sponsorship proposal?
- What is the best method for soliciting sponsors?
- What should be included in a sponsorship agreement?
- How would the OHWC evaluate the effectiveness of a sponsorship relationship?
- How would the OHWC disengage from a sponsorship relationship of which it feels is no longer meeting the OHWC objectives, what is the exit strategy?

Sponsorship Defined:

Sponsorship is different from philanthropy or donations, where no commercial advantage is sought. The OHWC should be fully aware of the benefits to be attained by each party as part of any prospective sponsorship recruitment, as a critical means to determine compatibility and synergy potential of the arrangement. Sponsors typically seek commercial advantages such as:

- Access to target markets
- Ceremonial / event involvement
- Exclusivity
- Future sponsorship options
- Leveraging other marketing promotional activities through the sponsorship
- Promotional and merchandising
- Publicity and advertising opportunities, including signage.

Sponsorship Strategy:

Sponsorship strategies need to set out the objectives of sponsorship activities and clearly establish procedures for soliciting, evaluating, assessing level of risk, approving and exiting sponsorship bids or relationships.

The integrity and credibility of the OHWC and its members shall be the overriding consideration in all sponsorship activities. It is in the best interests of both the OHWC and the sponsor to ensure that the OHWC remains a trusted and credible source of information for all stakeholders.

The OHWC recognizes that sponsorship must be pursued only as it does not impede the following core principles:

- editorial independence
- institutional integrity
- consistency with the OHWC's mission, vision and values

This sponsorship policy is applied by the OHWC to ensure adherence to these core principles. Where there is a sponsorship relationship between OHWC and a third party, this relationship shall be transparent and apparent to members and users of OHWC products and services.

Furthermore, sponsorship strategies are guided by a number of fundamental principles:

- Sponsorships should be compatible with OHWC objectives;
- Organizations should be screened to ensure full disclosure of who the organization is, including divisions, branches and subsidiaries. This should also consider what branding is to be used, with a minimal focus on product or services of the sponsorship organization.
- Sponsorship is a commercial exchange, therefore each sponsorship proposal should have a measurable value, outcomes and clear performance targets;
- Sponsorship should enhance the OHWC's image and reputation;
- The risk associated with each sponsorship needs to be assessed and managed;
- The solicitation process must be fair, open and transparent;
- A sponsorship arrangement must be documented in a contract; inclusive of categories to define purpose, scope, application, terms and timelines, steps to extend, renew and exit from the contract.
- The OHWC should consider creating Sponsor Champions for each major/premier sponsor with responsibility for relationship maintenance during the agreement.

Setting Performance Outcomes and Targets:

Measurable outcomes and targets confirm value for money and the effectiveness of sponsorship programs. Targets should be part of a sponsorship program approval process, with performance measured regularly against targets and both parties to an agreement working together to achieve the targets.

Defining Potential Parties

Potential sponsors should share the same objectives and goals of OHWC in terms of vision related to healthy workplace promotion.

Organizations that represent product and services that would be considered detrimental to the OHWC should be excluded from sponsorship, this could include but not be limited to:

- Tobacco, alcohol, other substances that are viewed as unfavourable to personal health
- Discriminatory and/or hate related messaging
- Exploitive, violent, pornographic or sexual related product an/or messaging
- Gambling and other similarly alternative behaviour activities

- Weapons related product or services
- Services or product not viewed as relevant to OHWC objectives and goals

Individual parties or organizations willing to provide donations and/or funds to the OHWC should be encouraged to make general contributions rather than specific to a particular program, activity or event. This would allow the OHWC to retain discretion as to who funds are used in the best interest of OHWC.

In developing relationships with the private and the broader public sectors, the OHWC's reputation and principles must be ensured. All proposed relationships must be evaluated for real or perceived conflict of interest either for the Board of Directors or for the members of the organization. Relationships will be avoided with all enterprises whose activities are incompatible with the OHWC's work.

Assessing Level of Risk:

Other than a proposed sponsor's compatibility with Coalition objectives and an open and transparent acquisition process, there can be other risks associated with a sponsorship arrangement. The following decision filter tool can be used to assess the level of risk associated with a sponsorship arrangement, as part of the recruitment and selection process. If a question is answered 'yes' to one or more of these questions, a more in-depth review of the potential sponsor and the arrangement should be conducted to assess the level of risk exposure: high, medium, low.

Level of Risk Test:

	Sponsorship Risk Criteria	Yes/No	Risk H/M/L
1.	Is there any doubt about the sponsor's capacity to deliver on its commitments?		
2.	Would an association with the sponsor cause public controversy?		
3.	Would the OHWC appear to be endorsing a sponsor's products or services?		
4.	Could the sponsorship arrangement expose the OHWC to liability?		
5.	Is the value of the sponsorship support disproportionately large, compared to on-going operating expenses, and the value of other sponsor support?		
6.	Is the sponsorship proposal a multi-year arrangement?		
7.	Is the sponsorship unsolicited?		

Develop a Risk Management Plan:

Where risks have been identified and the program wishes to proceed with a sponsorship arrangement, the next step is to develop a risk management plan. The plan should clearly state each risk and include an action plan to reduce or mitigate the risk. The plan should include early warning signals.

The OHWC should consider developing a Code of Conduct/Ethics which should be included in any sponsorship agreement which would stipulate the conditions and behaviours considered appropriate and those actions that would not be acceptable of the term of the sponsorship.

Obtain Legal Advice in Developing the Sponsorship Agreement:

Make sure to record all sponsorship agreements in writing. The content of an agreement will vary depending on the complexity of a sponsorship arrangement. Assessments that are high value, complex and/or involve risk require a formal contract which details specific terms and conditions.

Exit Strategy

A critical aspect of sponsorships is the process to be used to guide sponsorship parties through the steps to be followed to extract a party no longer wishing to participate in the relationship. The grounds for conduct, termination, notice, timelines and penalties that could be incurred should be developed and reviewed with all parties prior to the sponsorship agreement being initiated.

Terms for Renewal, Revision and Extension

Sponsorships should consider how extensions, renewals and revisions within the relationship are to be administered. Opportunities to review the contract should be established as milestones within the relationship as a means to ensure the expectations of stakeholders are being met and where possible enhanced. Are there opportunities to expand or bundle sponsor exposure in multiple events, publications and activities? This would allow sponsors to see the longer term benefits of aligning themselves with the OHWC.

Sponsorship Benefits

The OHWC should be clear on the benefits to be provided to prospective sponsors and should also consider the potential of providing a stepped progression of benefits to be derived as determined by the level of participation, contribution and value of that individual or organization. Contributions in terms of other means besides monetary terms should also be incorporated in the sponsorship formula to allow for those individuals or groups that would offer alternative resources to the organization. This may include volunteer hours of stay, facilities for meetings, presentations, annual meetings, infrastructure, information technology, storage (both physical and electronic), printing and literature production. These are examples of areas particularly important to the OHWC.

Sponsorship agreements should clearly define what benefits the sponsor will experience with consideration to OHWC acknowledgement of support, inclusion of sponsor logo or branding in promotions and cross promotion of allowing/not allowing OHWC logo and branding related to sponsor promotions and activities.

The OHWC reserves the right to not link, or to remove links, to other websites.

OHWC logos may not appear on any other websites, including the sponsoring organization's website, or promotional material, without prior written approval.

Sponsors may refer to the fact that they have sponsored a portion of the OHWC in their promotional material and efforts, but no characterization of the sponsorship relationship shall be taken or used as evidence of OHWC endorsement of the sponsor or of any of the sponsor's products or services. The OHWC will work with the sponsor to develop appropriate wording.

The OHWC should ensure that in any sponsorship agreement committed to, the OHWC would retain full control over programs, activities or events where sponsors participate.

The following chart represents a means to identify the benefits that could be managed in accordance with the level of participation a sponsor is prepared to commit to.

Potential Sponsorship Benefits

Promotion	Platinum	Gold	Silver	Bronze
One (1) exhibit space at annual event	Yes	Yes	Yes	
Premier recognition on the event web site (logo) hyperlink to your website	Premier	Yes	Yes	Yes
Premier recognition on sponsor banner at event (logo)	Premier	Yes	Yes	Yes
Premier recognition in PowerPoint presentation at all plenaries (logo)	Premier	Yes	Yes	Yes
Premier recognition in final program (logo)	Premier	Yes	Yes	Yes
Complimentary advertisement in final event program	Full Page	Half Page	No	No
Opportunity to introduce a plenary session	Yes	Yes		
Promotional insert included in delegate kits (subject to approval)	Yes	Yes	Yes	Yes
Complimentary registration(s) to event	3 comps	2 comps	1 comp	2 for 1
Acknowledgement by OHWC Chair at opening and closing of event	Yes			
Promotional item to be distributed on-site (subject to approval)	Yes			

Other Sponsorship benefits that could be considered might include:

- Participation in Round Table Discussions and work of the standing committees
- Access to other networks as available to the OHWC.

Additional Benefits for Directed Sponsorship:

- Recognition highlighting sponsored event/item on signage in communication materials (program, web site and signage)
- Recognition in the final program – (logo)
- Opportunity to introduce sponsored session

Options where sponsors may want to direct their contributions as part of OHWC events could include but not be limited to:

- Networking Breakfast
- Wellness Activity
- Luncheon
- Showcase Reception
- Delegate Bags
- Concurrent Session(s)