

 TRUST WAIKATO <small>TE PUNA O WAIKATO</small>	<h1>Sponsorship</h1>	
Section	Policy Manual Section 1.4	
Version/Date	4.0/21 March 2011	
History	Policy approved	
	Draft Policy prepared	12/28 November 2007
	Final Policy adopted	17 December 2007
	Updated Policy adopted	21 March 2011
Review Schedule	Three yearly or as required	
Purpose	<i>The Sponsorship Policy outlines the criteria and process for the use of Trust Waikato sponsorship funds for community organisations and events.</i>	

1.0 Introduction

1.1 Sponsorship is the negotiated provision of funds, goods and/or services to organisations in exchange for advertising, publicity and/or other benefits.

For Trust Waikato, sponsorship:

- usually takes the form of cash support in exchange for agreed acknowledgment;
- may be between Trust Waikato and one or more organisations or events; and
- does not include direct commercial dealings between Trust Waikato and other organisations or simple donations of funds, goods and services.

1.2 The Trust sponsors events and organisations from time to time where one of the following benefits can be delivered:

- a. generic community support for and awareness of the Trust.
- b. an increased profile among community groups.
- c. an increased understanding of the nature and scope of projects that the Trust wishes to support.

1.3 In deciding on sponsorships the Trust Board and staff endeavour to ensure that the events/organisations/facilities that are sponsored are representative of the types of groups and activities which are typically supported by the Trust by way of donations, and are consistent with the Trust's strategic priorities and donation focus.

2.0 Criteria

- 2.1 Each sponsorship will be considered on its merits. The following factors will, however, be taken into consideration when determining a sponsorship decision:
- a. The Trust's primary means of supporting community groups, projects and events is through donations.
 - b. The normal Trust criteria about the management, operation and accountability of a group should apply at least equally to a group being considered for sponsorship.
 - c. The Trust may from time to time offer a sponsorship to a group in addition to making a donation to the group. In such circumstances the Trust clearly separates the two matters. Donations are assessed and decided in relation to the Trust's donation policy.
 - d. The Trust prefers to enter into long term sponsorship arrangements for significant facilities and events. However, the Trust also recognises there is value in sponsoring one-off community events that strongly support the Trust's donation focus and where the sponsorship helps raise awareness of Trust Waikato in particular communities.
 - e. In deciding on sponsorships, the Trust endeavours to ensure a representative geographic mix of sponsorships.

3.0 Sponsorship Process

- 3.1 Organisations are advised to talk with the Communications Advisor at Trust Waikato about any possible sponsorship opportunities.

A proposal from the organisation will be requested if the event or project fits the Trust's criteria and there is sufficient sponsorship budget remaining.

- 3.2 Where the recommended sponsorship amount is greater than \$5,000, a proposal will be presented to the Trust Board in the form of a report by the Communications Advisor, with the endorsement of the Chief Executive and a clear recommendation to Trustees. If a proposal is successful, a formal agreement detailing the sponsorship rights and obligations (see 4.0 and 5.2, below) will be drawn up between Trust Waikato and the organisation.
- 3.3 For recommendations up to \$5,000, the Chief Executive is authorised to approve the sponsorship proposal, as provided for in the Delegations of Authority policy.

If a proposal is successful, a letter from Trust Waikato will be drawn up specifying the conditions of the sponsorship (see 4.0, below).

4.0 Sponsorship Acknowledgement

- 4.1 The extent of acknowledgment should reflect the level of sponsorship.
- 4.2 Each sponsored organisation or event will be required to promote Trust Waikato in the following ways:
- a. Approved use of the Trust Waikato logo on promotional material.
 - b. Appropriate signage opportunities, using signage supplied by Trust Waikato.
 - c. Where appropriate, Master of Ceremonies (MC) acknowledgement at the event.
 - d. Acknowledgement of Trust Waikato support in any report of the organisation or event.

Where a sponsored organisation, facility or event receives significant funding of greater than \$5,000, the following additional promotion is expected, where deemed appropriate:

- e. Naming rights for the organisation, facility or event.
- f. Invitations to meet with the organisation and/or to attend events.
- g. Where appropriate, invitations to Trustees or staff to speak/present on behalf of Trust Waikato.
- h. Acknowledgement of Trust Waikato's sponsorship in media releases.

5.0 Accountability and Review

- 5.1 Within 3 months of the sponsorship being completed, or at a date specified in the letter or agreement described in section 3.0, above, the organisation must submit a report to the Trust. The report should confirm that the conditions of the sponsorship have been met, and describe the benefits to the community of the event, facility or organisation, in relation to the Trust's sponsorship.
- 5.2 In addition, all sponsorships of greater than \$5,000 are to be reviewed as specified in the formal agreement required in section 3.2.

6.0 Budget

- 6.1 The sponsorship budget is set annually as part of the Trust's normal budgeting process.
- 6.2 Sponsorship expenditure is disclosed publicly in the Trust's annual financial statements.

- 6.3 The sponsorship amount is negotiated as the minimum amount which can be given that will ensure a successful event and appropriate recognition for the Trust.

7.0 Donation of Promotional Items

The Trust also has a supply of promotional products such as balloons, bags, note pads, pens, drink bottles, t-shirts and umbrellas, purchased using the promotional budget. Trust staff allocate these products as appropriate.

Policy		Sponsorship
Version Control		
1.0	Policy	
2.0	Draft Policy discussed	26 November 2007
3.0	Final Policy adopted	17 December 2007
4.0	Updated Policy adopted	21 March 2011
Review Schedule		
A	Three yearly (budget reviewed annually)	April 2014