



# PORTLAND PARKS & RECREATION

Healthy Parks, Healthy Portland

## POLICY NAME: Sponsorship

**Policy Category:** Business Development

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### Introduction

Portland Parks and Recreation (PP&R) is a bureau of the City of Portland whose services are primarily funded from the City's general fund. In recent years demands upon such funds have increased, a trend that is expected to continue.

To maintain and enhance the city's park and recreation system, Portland Parks and Recreation is actively seeking to establish alternate revenue streams that will increase its ability to deliver services to the community and/or provide enhanced levels of service beyond the core levels funded from the City's general fund. One of the alternate funding sources being pursued is sponsorship.

### Policy Statement

It is the policy of Portland Parks and Recreation to actively seek sponsorships for its events, services, parks, and facilities from individuals, foundations, corporations, nonprofit organizations, service clubs, and other entities. The purpose of such sponsorships is to increase PP&R's ability to deliver services to the community and/or provide enhanced levels of service beyond the core levels funded from the City's general fund.

In appreciation of such support, it is the policy of Portland Parks and Recreation to provide sponsors with suitable acknowledgement of their contributions. However, such recognition shall adhere to the aesthetic values and purpose of the bureau's parks, facilities, and services. In addition, such recognition shall not detract from the visitor's experience or expectation, nor shall it impair the visual qualities of the site or be perceived as creating a proprietary interest.

### Definitions

For the purpose of this policy the following definitions apply:

Advertising – the activity of attracting the public's attention to a particular product or service.

Community Center – a building in which structured and unstructured recreational and cultural activities are provided.

Corporate Slogan – a word or phrase that may be attached to a corporate name or logo, e.g., Healthy Parks, Healthy Portland.

Donations – the provision of in-kind goods and/or money for which no benefits are sought.

Interpretive Sign – a sign within a park that interprets natural, historic, and/or cultural features.

Facility – any building or structure that is located on property owned or managed by Portland Parks and Recreation.

Logo – a symbol or name that is used to brand an organization.

Park – open space owned or managed by Portland Parks and Recreation for recreational and/or natural resource values.

Park Resources – the natural and/or cultural landscape elements within a park.

Plaque – a flat memorial plate containing information that is either engraved or in bold relief.

Recognition Benefits – opportunities given to the sponsor to have its name/logo appear on park property or materials for a specified period of time.

Sign – a structure that is used to identify a specific park, to convey directions to park users, and/or to inform them of the relevant regulations and other pertinent information.

Sponsorship – financial or in-kind support from an individual or corporation for a specific service, program, facility, park or event in return for certain benefits.

Sponsorship Agreement – the legal instrument that sets out the terms and conditions the parties have agreed to.

Temporary Sign – a sign that is erected for a known period of time, usually not exceeding 12-18 months.

Zone Manager – the Tier 2 management positions within the City Nature and Services Departments and the Tier 2 management position within Workforce and Community Alliances Department that is responsible for facilities and services having a citywide impact.

## **Guiding Principles**

### **SPONSORSHIP PROPOSALS**

The following principles form the basis of the organization's consideration of sponsor proposals:

1. All sponsorships must directly relate to the intent of the community center or subject park, and its master plan.
2. Sponsorships cannot be made conditional on Portland Parks and Recreation's performance.
3. The mission of a sponsorship organization should not conflict with the mission of Portland Parks and Recreation.
4. Sponsorships provide a positive and desirable image to the community.
5. Sponsorship benefits offered should be commensurate with the relative value of the sponsorship.
6. Operating costs associated with the sponsor's proposal should not exceed 10%.
7. Individual sponsors should not limit Portland Parks and Recreation's ability to seek other sponsors.
8. Recognition benefits to be offered do not compromise the design standards and visual integrity of the park or facility.
9. An evaluation of the potential sponsor which shall not be limited to:
  - Products/services offered
  - Company's record of involvement in environmental stewardship and social responsibility
  - Principles of the company
  - Sponsor's rationale for its interest in Portland Parks and Recreation
  - Sponsor's expectations
  - Sponsor's timeliness and/or readiness to enter into an agreement

All sponsorship proposals that exceed \$500,000 will be approved by City Council.

#### RECOGNITION OF SPONSORS

The following principles form the basis of the organization's recognition of sponsors:

1. Portland Parks and Recreation appreciates all sponsorships that enable it to further its mission.
2. In recognition of a sponsor's contribution, preference will be given to providing a form of recognition that is not displayed within parks.
3. Recognition of a sponsorship shall not suggest in any way the endorsement of the sponsor's goods or services by Portland Parks and Recreation, or any proprietary interest of the sponsor in PP&R.
4. Any physical form of on-site recognition shall not interfere with visitor use or routine community center/park operations.
5. The form of any on-site recognition shall be of an appropriate size and color and shall not detract from the park surroundings or any interpretive message.
6. All sponsorship agreements will be for defined period of time having regard to the value of the sponsorship and the life of the asset being sponsored.
7. Naming of events and/or facilities within a park or community center in recognition of a sponsor is permitted providing such names are subordinate to the name of the park or the community center.

Where naming/renaming as a sponsorship benefit is to be offered in recognition of a sponsorship, the local neighborhood association will be notified of the proposal. The sponsorship proposal will then be considered by a standing committee that comprises the Director of Portland Parks and Recreation or his/her representative, a staff member from the office of the Parks Commissioner, a member of the Portland Parks and Recreation Board, and the Director of the Office of Neighborhood Involvement or his/her representative. This committee shall:

- Review the proposed request for its adherence to the policies of Portland Parks and Recreation.
- Ensure that supporting information has been authenticated.
- Take into consideration the comments of the relevant neighborhood association(s).

The standing committee will then present a recommendation to the Parks Commissioner who may either accept or reject any proposal. The Parks Commissioner may also seek to refer the matter to the Parks and Recreation Board for advice and/or convene a public meeting to gain additional information prior to taking the matter to City Council for a final decision.

#### **Procedures & Guidelines**

These procedures and guidelines have been established to ensure all sponsors are treated in an equitable and appropriate manner and that in recognizing a sponsor's support, the values and purpose of a particular community center and/or park is not diminished. The guidelines and procedures contained within this policy do not apply to gifts and/or grants for which there is no benefit or recognition.

#### SPONSORSHIP CATEGORIES

Sponsorships are appropriate for the following broad types of activities:

- Events – financial or in-kind support for an event organized by Portland Parks and Recreation on PP&R property.
- Park/Facility Development – financial or in-kind support associated with the design and construction of a particular park or recreational or cultural facility. Projects within this category will be typically be of a one-time nature.
- Program Delivery – financial or in-kind support that facilitates the ongoing delivery of a particular citywide or site-specific program.

#### TYPES OF RECOGNITION

Sponsors will be provided with a level of recognition that is commensurate with their contribution. In acknowledging a sponsor, preference will be given to an off-site form of recognition that may include

one or more of the following:

- A thank you letter.
- Publicity through Portland Parks and Recreation's website, newsletters, and/or media releases, and through the sponsor's corporate newsletter, annual report, and/or website.
- Events such as a press conference, photo opportunity, ground breaking or ribbon cutting ceremony.
- Mayoral and/or Commissioner acknowledgement at civic functions.
- Commemorative items such as a framed picture or plaque.
- Register of sponsors that is accessible to the public either online or at Portland Parks and Recreation administrative offices and community centers.
- Acknowledgement on printed materials such as recreational and environmental program catalogs.
- Inclusion of the individual's name or company name and logo on a sponsorship recognition wall at a community center or the administrative offices of Portland Parks and Recreation.

Where on-site recognition is to be provided, types of recognition may include:

- Temporary signs, which may include the use of logos, acknowledging a sponsor during the construction or restoration of a particular facility, park or an event.
- Interpretive sign, which may include the use of logos.
- Permanent plaque or sign (permanency is limited to the life of the asset).
- Naming of a particular facility within a community center or park where the sponsorship covers the majority (>60%) of the cost of the particular facility or structure.

#### DETERMINING TYPES OF RECOGNITION

Decisions as to the type of recognition to be provided to a sponsor under \$10,000 shall be made by the Sponsorship Coordinator. For sponsorships over \$10,000, decisions shall be made by the Marketing and Business Development Manager, unless it involves naming of a facility within a community center or park, in which case, the PP&R Naming Policy procedures will apply. In determining the type and extent of recognition benefits, current market research data will be used to determine the value for each tangible and intangible benefit offered to the sponsor.

#### DETERMINING DESIGN STANDARDS FOR VARIOUS TYPES OF RECOGNITION

**Design and Location of Temporary Signs and Plaques:** Recognition of a sponsor shall be permitted on either a temporary sign or a sign that is of a directional, informative or interpretive nature. In such circumstances the sponsor's name and/or logo shall be designed so that it does not dominate the sign in terms of scale or color. The Sponsorship Coordinator shall determine approval of a sponsor's name and/or logo on signs. Likewise, the Sponsorship Coordinator shall also approve the design and content of plaques.

The siting of temporary signs and plaques shall be determined between the Sponsorship Coordinator, the relevant Zone Manager, and a Park Planner. In the event of consensus not being reached, the Marketing and Business Development Manager's decision shall be final.

**Design and Location of Sponsorship Boards:** The Sponsorship Coordinator shall determine the design of sponsorship boards. In developing a suitable design, the Sponsorship Coordinator shall consider a format that allows for the recognition of sponsors using small name plates, plaques or tiles so sponsor details can be added or removed easily.

The Sponsorship Coordinator, in consultation with the relevant Zone Manager and an Architect, shall determine the location of sponsorship boards within facilities. In the event of consensus not being reached, the Marketing and Business Development Manager's decision shall be final.

**Design and Information Requirements for Website:** The Sponsorship Coordinator, in consultation with the Web Manager, shall determine the design and information to be posted on the bureau's website as it relates to sponsor recognition.

## SPONSORSHIP AGREEMENT

All sponsorship offers shall be the subject of a sponsorship agreement. An example of such an agreement is attached.

## THE SPONSORSHIP PROCESS

All sponsorship opportunities shall be sought out and developed under the guidance of the Marketing and Business Development Unit. In October each year, the Sponsorship Coordinator, in consultation with all managers, shall develop a sponsorship plan that includes a prioritized sponsorship opportunities list for the purpose of soliciting sponsorships for the forthcoming year.

This list shall be approved by the Senior Management Team and subsequently communicated to the Portland Parks Foundation by the Marketing and Business Development Manager to facilitate an integrated approach to the procurement and management of sponsorships by the two organizations.

All unsolicited sponsorship proposals shall be referred to the Sponsorship Coordinator, who shall be responsible for their evaluation and the provision of a recommendation to the Marketing and Business Development Manager as to whether the proposal should be accepted or rejected.

## PROPOSALS UNDER \$10,000

The development of sponsorship proposals and the procurement of a sponsor for proposals identified on the prioritized sponsorship opportunities list that are less than \$10,000 shall be handled by Zone Managers in consultation with the Sponsorship Coordinator.

To ensure a consistent and coordinated approach, prior to approaching a potential sponsor Zone Managers shall:

1. Consult with the Sponsorship Coordinator as to the content and layout of the proposal document, recognition benefits to be offered, and the organizations, companies, and/or individuals to be approached.
2. Submit the sponsorship proposal to the Sponsorship Coordinator for approval.

Upon securing a sponsor, Zone Managers will liaise with the Sponsorship Coordinator to execute the necessary sponsorship agreement and benefit recognition provisions.

Ongoing administration of the sponsorship agreement and the management of the sponsor's relationship with the bureau shall be the responsibility of the relevant Zone Manager.

## PROPOSALS OVER \$10,000

Proposals over \$10,000 shall be the responsibility of the Sponsorship Coordinator and the Marketing and Business Development Manager, who shall be responsible for preparing, evaluating, and managing sponsor relations for these sponsorships.

## TERMINATING SPONSORSHIPS

Portland Parks and Recreation reserves the right to terminate any sponsorship should conditions arise during the life of that sponsorship that results in the sponsorship conflicting with this policy or the sponsorship is no longer in the best interests of Portland Parks and Recreation. Decisions to terminate a sponsorship shall be made by the Marketing and Business Development Manager in consultation with the Manager of Strategy, Finance and Business Development.

## ETHICAL CONSIDERATIONS ASSOCIATED WITH SPONSORSHIPS

Sponsorships are an important way in which Portland Parks and Recreation 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 Portland Parks and Recreation may need to reject a sponsorship offer. Circumstances

under which this may occur include:

- The potential sponsor seeks to secure a contract, permit or lease.
- The potential sponsor seeks to impose conditions that are inconsistent with Portland Parks and Recreation's mission, values, policies, and/or planning documents.
- Acceptance of a potential sponsorship would create a conflict of interest or policy, e.g., a sponsorship from a tobacco company.
- The potential sponsor is in litigation with the City of Portland.

#### MONITORING AND REPORTING SPONSORSHIP PERFORMANCE

Fundamental to improving the management and performance of Portland Parks and Recreation's sponsorship activities is the need for an effective program of review and reporting. Accordingly, the following performance indicators have been established and will be reported upon annually to the Parks and Recreation Board and to City Council:

- Number of active sponsorships
- Dollar value of active sponsorships
- Number of proposals presented to potential sponsors
- Number of sponsorship proposals declined by potential sponsors

#### **Related Policies, Procedures & Forms**

Naming Policy

#### **Appendix**

Sponsorship Agreement

Sample: Annual Sponsorship Needs List

Sample: Sponsorship Recognition Plans

Sample: Letter

#### **Additional Comments**