



Canada's Capital University

Policy Name:	Corporate Sponsorship Acceptance Policy
Originating/Responsible Department:	University Advancement
Approval Authority:	Senior Management Committee
Date of Original Policy:	May 2019
Last Updated:	
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Contact:	Chief Advancement Officer

STATEMENT OF POLICY

Carleton University is committed to excellence in teaching and research and to the fundamental principles of academic freedom. As such, Carleton will accept sponsorship by institutions, corporations, organization or foundations to help it achieve its academic mission, and to enhance its programs and services to students, staff, faculty and alumni.

I. SPONSORSHIP DEFINITION

A Sponsorship is a marketing-oriented, contracted financial alliance between Carleton University and a corporation, organization or foundation. Per the Canada Revenue Agency (CRA), "Sponsorship occurs when a business makes a donation toward the cost of a charity's activity or event and, in return, the charity advertises or promotes the business's brand, products or services".

Funds provided to the University through sponsorships are not eligible for charitable income tax receipts in accordance with Canada Revenue Agency Regulations and Guidelines. A Sponsorship is not a donation or a private grant.

II. SCOPE

This policy applies to all departments and individuals, including but not limited to staff, faculty, students and volunteers, involved in the identification, cultivation, solicitation, fulfillment and stewardship of sponsors and the acceptance of Sponsorship funds for Carleton University.

III. PRINCIPLES OF SPONSORSHIP ACCEPTANCE

The following principles will be considered before a Sponsorship is accepted by Carleton University. The Department of University Advancement is responsible for ensuring that the University abides by these principles. The Sponsorship will:

- Support the university in achieving its academic mission, and enhancing its programs and services to students, staff, faculty and alumni;

- Not in any way limit or impose conditions on academic freedom;
- Comply with federal, provincial or municipal law, and the Ontario Human Rights Code;
- Not be accepted if it will result in unwarranted or unmanageable expense to the University;
- Not be accepted if entering into business relationships or accepting external support will compromise Carleton's reputation or commitment to its academic mission and essential values;
- Not be accepted if it will jeopardize the University's charitable status;
- Not be accepted if it requires the University to provide any special consideration including, but not limited to, admission to the University for the corporate partner or designate, or improperly benefit any individual or group, or requires that Carleton University deviate from its normal hiring, promotion and contracting procedures.

IV. PROCEDURES/ROLES AND RESPONSIBILITIES

- All Sponsorship relationships with Carleton University must be written agreements and must be approved through the Department of University Advancement to support the prospect identification, prospect clearance, solicitation, asset valuation and fulfillment processes.
 - Sponsorship packages and assets will be vetted through the Department of University Advancement to ensure institutional coordination and consistent valuations.
- Sponsorships will be recorded with the Department of University Advancement to support a coordinated relationship-based approach that supports revenue generation. Such recording includes the name of the company or organization where a contractual sponsorship agreement exists and the appropriate Carleton University employee contact.
- Sponsorships under \$5,000 will be vetted through Advancement and approved by the department head.
- Sponsorships over \$5,000 but under \$100,000 are approved by the Chief Advancement Officer and appropriate Dean, departmental representative or equivalent.
- Sponsorships over \$100,000 but under \$1 million dollars are approved by the Chief Advancement Officer and the Vice-Presidents.
- Sponsorships of \$1 million dollars and over are approved by: the Chief Advancement Officer; the Vice-Presidents; the President and Vice-Chancellor; and the Chair of the Board of Governors and/or the Executive Committee of the Board of Governors at the discretion of the Board Chair.

- In-kind sponsorships may be accepted by the aforementioned parties based on their value to the university.
- Sponsorships that include category or institutional exclusivity, or sponsorship agreements signed for 3 or more years, require the approval of the Chief Advancement Officer and appropriate Vice-President.
- Carleton University additionally reserves the right to end a sponsorship agreement at the President's discretion if it constitutes a significant and continuing impairment to the university's reputation.

V. ELIGIBILITY

The following are examples of the types of Sponsorship agreements that are covered under this policy:

1. Permanent and long-term naming opportunities connected to specific buildings and spaces within the Carleton University campus;
2. Program sponsorship tied to a university-wide initiative;
3. Project sponsorships tied to symposia and other time-limited projects;
4. Event sponsorships;
5. Materials and equipment sponsorship;
6. Digital sponsorships.

The policy does not apply to sponsored research or academic projects.

VI. SPONSORSHIP REVENUE

Carleton University will use Sponsorship revenue to achieve its academic mission, and/or to enhance its programs and services to students, staff, faculty and alumni. Sponsorship revenue will be directed to support initiatives that are aligned with the intended audience by the corporate partner as agreed to by the Chief Advancement Officer and appropriate Vice-President in the sponsorship agreement.

VII. RESPONSIBILITY TO SPONSORS

Carleton University values corporate partnerships in support of its mission, vision and values. The Department of University Advancement helps sponsors to design sponsorship programs that meet each sponsor's business objectives within the context of the University's needs and priorities.

The University has an ethical responsibility to every corporate partner. All staff, volunteers and professional representatives acting on behalf of the University will conduct themselves in accordance with accepted professional standards of accuracy, truth and integrity.

At all times, advisors working with sponsors or prospective sponsors to the University will keep all information, data, or other communications strictly confidential.

Sponsorship contracts or letters of agreement will be developed in consultation with the University's legal counsel and the appropriate staff person.

VII. RELATED POLICIES

Advertising Policy

Alcohol Policy

Commemorative Naming Policy

Commercial Activities Policy

Gift Acceptance Policy

Gifts in Kind Policy

Philanthropic Naming Policy

Research and External Support Fund Creation and Amendments