

OUT-GOING SPONSORSHIP GUIDELINES

1. Introduction

Out-going sponsorship refers to a commercial agreement between La Trobe University and a sponsored organisation. The sponsorship may involve La Trobe's support of an individual program/event or of an on-going activity.

Sponsorship may be in the form of financial or 'in kind' support. In kind support involves La Trobe University providing non-financial support such as presenters, facilities or equipment.

Out-going sponsorship is an important element in La Trobe University's overall marketing strategy and in its engagement with its local communities. It provides a vehicle by which the University can promote its core business and further develop its services, systems and programs.

La Trobe University requires any organisations receiving sponsorship from the University to enter into an agreement that details the responsibilities and expectation of both parties, and sets clear targets based on La Trobe University's marketing objectives.

For a sponsorship to be considered, the aims and goals must be clearly set out prior to the commencement of the program and the activity must be rigorously reviewed against La Trobe University's corporate, marketing and public relations sponsorship criteria (see 2.2).

These guidelines are intended to both assist applicants applying for sponsorship and provide criteria for the University in assessing these applications.

2. Guidelines

La Trobe University will consider and evaluate applications for sponsorships according to the following guidelines.

- 2.1 Sponsorships must reflect the University's core priorities of teaching, learning and research, as outlined in the University's Strategic Plan (2008-2012).
- 2.2 The University will only recommend and implement activities that can be shown to fulfil **one or more** of the following corporate, marketing or public relations objectives:
 - 2.2.1 The sponsorship will enhance the reputation of the University locally, nationally, or internationally.
 - 2.2.2 The sponsorship will build, maintain or enhance brand awareness in the University's key target markets.
 - 2.2.3 The sponsorship will create undergraduate or postgraduate student recruitment opportunities or enhance educational pathways.
 - 2.2.4 The sponsorship will reinforce La Trobe's position as a leading Australian teaching and research university.
 - 2.2.5 The sponsorship will engender and further develop relations with the community and/or community organisations.
- 2.3 The University will endeavour to allocate sponsorships over a wide range of disciplines and interests that are within the University's purview.
- 2.4 "Not for Profit" organisations may receive priority consideration.
- 2.5 The immediate and/or future benefits and estimated return to the University, whether financial and/or otherwise, should be determined in each sponsorship agreement.

- 2.6 Sponsorships allowing naming rights for the University and/or exclusive sponsorship by an educational body will be highly regarded.
- 2.7 The University will not approve sponsorships which are considered to fall under the following categories:
- Political or religious bodies (excluding community service agencies)
 - Gambling, gaming or betting events or venues
 - Organisations linked with the tobacco, drugs or alcohol industry
 - Sexual services or sex industry venues
 - Products or services that denigrate, exclude or offend certain community groups
 - Products or services not consistent with the University's image, standing and presentation
 - Any sponsorship which may be considered to be a conflict of interest for the University.
 - Sponsorship of individuals (other than La Trobe students and employees who are undertaking an event/activity of national or international significance).
- 2.8 The University will undertake a regular review of all sponsorship agreements to ensure that targets have been achieved and objectives met.
- 2.8.1 At the conclusion of the sponsorship agreement where the value of the sponsorship exceeds \$2 000 an evaluation of the sponsorship should be undertaken. The program may be evaluated by using the Sponsorship Evaluation Form (appendix C).
- 2.8.2 Where the sponsorship program is ongoing, it should be evaluated annually using the evaluation form (appendix C).

3. Procedures

- 3.1 Applications for **sponsorships over A\$2 000**, regardless of the extent or type of funding or potential funding source, must be submitted to the University for consideration and approval as a business case on the **attached proforma (Appendix A)**.
- 3.2 The proforma should be returned to:
- Executive Director
Division of Marketing & Engagement
La Trobe University
Victoria 3086, Australia
- Phone: +61 3 9479 3356
Email: dme@latrobe.edu.au
Fax: +61 3 9479 1387
- 3.3 Applicants for **sponsorships under A\$2 000** must submit a letter detailing how the contribution satisfies conditions 2.1 and 2.2 and they must attach the terms of agreement to the same address.
- 3.4 Sponsorships may be considered at any time during the year.
- 3.5 The University will assess the application and will advise the parties concerned as soon as possible.
- 3.6 The University may consult other personnel/groups/external organisations in relation to the application.
- 3.7 Sponsorships will be limited to the available funds and the University reserves the right to reject applications based on short and longer term budgetary planning.
- 3.8 Sponsorships will be valid for the terms of the agreement only.
- 3.9 Requests for renewal (where appropriate) are not guaranteed and require the applicant to re-submit an application/business case, as per Appendix A, approximately 8 weeks prior to the conclusion of the existing agreement.

APPENDIX A

Application for Out-going Sponsorship

Name of Organisation/Event/Activity/Individual	
Contact Person	
Position Title	
Address	
Phone	
Email	
Fax	

1. Description of the organisation to be sponsored (briefly describe the organisation and its key objectives):

2. Description of sponsorship (briefly describe the nature of the activities for which the sponsorship is being sought; please specify date/s if the sponsorship relates to an event):

3. Background to sponsorship (please outline relationship history)

4. Details of sponsorship (please define the key benefits the University is being offered e.g. logo on promotional collateral, material in show-bag, joint marketing opportunities)

5. Does this sponsorship reflect La Trobe's core priorities of teaching, learning and research?

6. Does this sponsorship meet La Trobe's corporate, marketing and public relations objectives?

If so, how and which one(s)? (Cf. Guidelines for Out-going sponsorship, 2.2)

7. Who is the target audience for the sponsorship?

8. Are there any risks for the University associated with i) taking the sponsorship up
ii) declining the sponsorship?

9. Are there other sponsors of this event/organisation? If so, who?

10. At what level is their sponsorship? (please circle)

Principle

Major

Minor

Other (specify) _____

11. Are there any other educational sponsors of the event/organisation? If so, please specify who and their level of sponsorship.

12. How would the value of this sponsorship be measured (e.g. media coverage, event attendance, enhanced La Trobe University brand awareness)?

13. What is the financial cost of this sponsorship to the University?

Minimum investment: A\$_____ Maximum investment: A\$_____

Other: _____

14. Are there any in-kind requirements relating to this sponsorship (e.g. utilisation of a La Trobe venue, security staff, portorage)?

15. If so, please estimate the financial value of the 'in kind' support.

16. Are there any staff resourcing requirements that the University would be required to meet? (Please specify the number of La Trobe staff that would be required, the type of activity and their required availability in terms of date/time.)

17. How much do you estimate promotional activities will cost La Trobe University?

18. What additional activities will La Trobe University need to undertake to make the most of its investment?

19. What is the **total investment** that will be required by La Trobe in terms of sponsorship fee, estimated in-kind costs and promotional costs?

20. Is this a one-off activity or an on-going commitment?

21. If on-going, what is the commencement date?

DD/MM/YY

Completion date?

DD/MM/YY

22. Do you consider there to be any potential conflict of interest with regards to this sponsorship? If so, please specify.

APPENDIX B

Assessment of Sponsorship Applications (Internal Office Use Only)

The following checklist has been developed to assist with the assessment of sponsorship applications and to ensure that all applications are evaluated in accordance with guidelines.

This checklist should be **attached to the University records file** created for the application.

Name of Organisation/Event/Activity	
Key Contact Person	
Address	
Phone	
Email	
Fax	

Evaluating the Organisation/Event/Activity

1. Is the organisation reputable and professional? Yes / No

2. Are they experienced in provision of the activity or program for which they are requiring support? Yes / No

3. Is the organisation well known in the community? Yes / No

4. Is the organisation a "Not for Profit" body? Yes / No

5. Does the organisation/event/activity fall into any of the following categories? (If yes, please indicate which.) Yes / No
 - Political or religious bodies
 - Gambling, gaming or betting events or venues
 - Organisations linked with the tobacco, drugs or alcohol industry
 - Sexual services or sex industry venues
 - Products or services that denigrate, exclude or offend minority community groups
 - Products or services not consistent with the University's image, standing and presentation
 - Individuals (other than La Trobe students and employees who are undertaking an event/activity of national or international significance).

6. Is there a conflict of interest between the sponsored organisation or its associates and La Trobe University?

7. Will this sponsorship affect any other sponsorships or partnerships that the University already has in place? Which other business units may benefit from this sponsorship?

Evaluating the Corporate, Marketing and Public Relations Benefits

8. Does the sponsorship reflect the University's core priorities of teaching, learning and research? Yes/ No

9. Does the sponsorship fulfil **one or more** of the following corporate, marketing or public relations objectives:

- The sponsorship will enhance the reputation of the University locally, nationally, or internationally. Yes / No
- The sponsorship will engender and further develop relations with the community and/or community organisations. Yes / No
- The sponsorship will build, maintain or enhance brand awareness in the University's key target markets. Yes / No
- The sponsorship contribution will create undergraduate or postgraduate student recruitment opportunities. Yes / No
- The sponsorship will reinforce La Trobe's position as a leading Australian teaching and research university. Yes/ No

10. Are the immediate or future benefits to the University clearly outlined in the business case? Please outline the major benefits here.

11. Is the reach of the sponsorship appropriate considering investment? (Please indicate audience quality and size).

12. If an event, is the timing beneficial for our target audience?

13. Are there naming rights associated with the sponsorship? Yes/No
If no, are there many other sponsors and could any be considered to be La Trobe competitors?

14. Is there an opportunity to communicate our key brand messages in promotional collateral?

15. Are there likely to be media opportunities? Local or national media?

16. Can the results of the sponsorship be measured effectively and easily? If not, should clearer targets be incorporated in the business case/proposal and re-submission requested?

Evaluating the Business Impact

17. What are the immediate and/or on-going financial costs associated with this sponsorship?

A\$ per annum (incl/excl GST); beginning on MM/DD/YY
and ending on MM/DD/YY.

OR

A\$ one-off payment (incl/excl GST)

18. What are the other costs associated with this sponsorship? Does La Trobe have the internal resources to support the sponsorship? (Please specify La Trobe staff resources, on-campus venue utilisation, support from security or ICT staff etc.)

19. Have all impacted business units been consulted regarding service provision (if applicable)? (Please indicate staff member and date of consultation).

20. What costs will be set aside for promotion of the sponsorship? (These costs may include merchandising, signage, advertising, public relations and promotional activities; as a guide, the University should allow at least \$1 for supporting every \$1 spent through sponsorship.)

21. Which fund and cost centre will be utilised for the sponsorship?

Fund: _____ Cost Centre: _____

22. Which staff member will be responsible for management of the agreement, including reviewing the agreement to ensure that targets have been achieved and objectives met?

Name: _____ Position Title: _____

Business Unit: _____

Phone: _____ Email: _____

Recommendation

I recommend this sponsorship be considered by La Trobe University.

Name:

Signature:

Please forward a copy of the guidelines, business case (Appendix A) and assessment (Appendix B) to the appropriate staff member (listed below) for final approval.

OR

I do not recommend that La Trobe University supports this sponsorship.

Name:

Signature:

Approval

Approval is required by the:

Executive Director (Marketing and Engagement) - for commitments up to A\$25,000

or

Deputy Vice-Chancellor (International & Future Students) - for commitments up to A\$50,000

or

Vice-Chancellor - for commitments over A\$50,000.

I approve this sponsorship

Name:

Signature:

OR

I do not approve this sponsorship

Name:

Signature:

Administration

- University records file created
- Copies of all correspondence relating to the application should be kept on the central records file.
- Copy of business case, checklist and signed approval forwarded to Legal Services for formal agreement establishment (if applicable)
- File reference no: _____
- Applicant notified of decision on DD/MM/YY

APPENDIX C

Evaluation of sponsorships

To ensure the sponsorship can be effectively evaluated please complete the following.

1. Name of sponsorship _____

2. Area/organisation sponsored _____

3. What is the objective of the sponsorship activity/event? (What will be achieved?)

Has the objective been achieved? Yes No

If no please provide a reason

4. What is the target audience for the event?

Does this match the University's target Audience? Yes No

If no please provide a reason why

5. How did the University/staff/students/the community benefit from this sponsorship activity?

6. Was there any media coverage as a result of the event? Yes No

If yes please describe:

7. What was the value of the sponsorship program/event? Was it monetary or presenting a favourable image?

8. Would you recommend that this sponsorship activity be sponsored again in the future? Yes No

If no, why

Please include any other comments or future recommendations

Date: _____

Signed: _____ Name: _____

Please provide a completed copy of this evaluation form to the Executive Director, Marketing and Engagement