



TITLE: PARTNERSHIPS, SPONSORSHIPS, DONATIONS, AND CO-OPERATIVE VENTURES

Date issued: August 1998

Last Revised:

Authorization: Senior Staff: 5 May 1998

1.0 OBJECTIVE

To regulate education-business partnerships and agreements intended to advance the mutual interests of the partners.

2.0 DEFINITIONS

In this procedure,

- 2.1 A **partnership** is an agreement founded on the concept of mutual benefit wherein an enduring relationship is sought to develop gains for both partners. The primary basis of an educational partnership is the exchange of human and/or physical resources to expand opportunities for student learning.
- 2.2 **Sponsorship** is an agreement between the Board/a school/an association and a company or community-based organization through which the sponsor provides financial or resource support in exchange for advertisement within the school or Board.
- 2.3 A **donation** is a voluntary gift made by an individual or group for philanthropic reasons which may be in the form of cash, goods or services.
- 2.4 A **co-operative venture** is an agreement between the Board and a company or community-based organization to participate in an education-business venture that will involve co-development of products or services related to education.

3.0 RESPONSIBILITY

The Director of Education

4.0 PROCEDURES

- 4.1 The *Ethical Guidelines for Business-Education Partnerships* of the Conference Board of Canada (1995) will be followed. The purpose of these ethical guidelines is to provide a code that partners can apply to regulate themselves and advance their mutual interests. These guidelines support business-education relationships that:
- a) enhance the quality and relevance of education for learners;
 - b) mutually benefit all partners;
 - c) treat fairly and equitably all those served by the partnership;
 - d) provide opportunities for all partners to meet their shared social responsibilities for education;
 - e) acknowledge and celebrate each partner's contributions through appropriate, non-commercial forms of recognition;
 - f) are consistent with the ethics and core values of all partners;
 - g) are based on the clearly defined expectations of all partners;
 - h) are based on shared or aligned objectives that support the goals of the partner organizations;
 - i) allocate resources to complement and not replace public funding for education;
 - j) measure and evaluate partnership performance to make informed decisions that ensure continuous improvement;
 - k) are developed and structured in consultation with all partners;
 - l) recognize and respect each partner's expertise;
 - m) identify clearly defined roles and responsibilities for all partners; and
 - n) involve individual participants on a voluntary basis.
- 4.2 To protect the interests of the Board and its schools and students, all education-business relationships will adhere to the following principles:
- a) all such relationships will be designed to support the curriculum and to enhance the quality and relevance of learning and desired educational outcomes;
 - b) commitment will come from the highest level(s) of the partnering organization(s);
 - c) fairness and equity of opportunity for schools and students will be pursued;
 - d) all aspects of a relationship will be consistent with the policies and procedures of the Board. For example, any products or business-sponsoring activities within the Board or its schools must be environmentally safe and consistent with a healthy lifestyle and Canadian values. Controversial products and services are

to be avoided. Specifically, sponsorships associated with products prohibited from sale to minors are not permitted;

- e) inappropriate promotion of a product or business and/or exploitation of relationships to reach students as a captive audience or as a means to communicate with parents are not permitted;
 - f) all expectations, benefits, and exchanges of resources will be known and governed by a signed agreement. Where an education-business relationship results, it will be managed on behalf of the Board by the appropriate supervisory officer;
 - g) where financial considerations are involved as a result of an education-business relationship, revenue opportunities for the Board/school/association will be optimized. The Board/school portion of any revenue accruing from such a relationship will be deposited in an account to be used for the enhancement of the Board's, or where applicable, the school's or association's, programs or investment in future projects;
 - h) any agreement which exceeds \$2,000 will be approved by the appropriate supervisory officer;
 - i) all agreements will provide for appropriate means to acknowledge or recognize the contribution to the Board/school/association; however, such agreements must not allow for direct marketing strategies with individual students (for example, preferred access to cafeterias, marketing surveys, sampling promotions, product references or advertising). Acceptable recognition includes such practices as the display of banners or plaques, acknowledgment in programs, recognition on communications and media releases, logos on uniforms, gymnasium and outdoor playing field signage, promotional use of official phraseology, and commemorative certificates; and
 - j) all education-business relationships and other agreements must be recorded in a central database accessible to administrative staff.
- 4.3 All financial contributions to schools must be held in a separate school account in accordance with Board Procedure PR.616.FIN: Accounting For School-Generated Funds.
- 4.4 Formal Partnerships
The following additional guidelines will apply to formal partnerships:
- a) a formal educational partnership agreement with the primary objective of promoting the interests of school(s) and students may be entered into by the Board and/or one or more schools with a corporation, business, labour group, civic organization, or other entity for the sharing of resources (human, material or financial);

- b) in the nature of the partnership, there will be the opportunity for the partner to become an ally and advocate of the Board and by extension public education;
- c) any direct involvement by students in a workplace setting must be for reasons which are educationally relevant and consistent with principles governing Co-operative Education;
- d) the written letter of agreement between the partners will include:
 - (i) the goals and objectives of the partnership;
 - (ii) the roles and responsibilities of the partners;
 - (iii) a detailed delivery model including activities and timelines, if appropriate;
 - (iv) the contributions and/or financial commitments of the participants to the partnership;
 - (v) an understanding of indemnification of the Board/partner for any claims arising out of the partnership; and
 - (vi) the means of sharing the outcomes or results of the partnership.

4.5 Commercial Sponsorships

- a) The following additional guidelines will apply to commercial sponsorships:
 - (i) sponsorships are categorized as:
 - (A) school-based agreements involving one school; or
 - (B) Board or association agreements involving schools in the system;
 - (ii) a sponsorship prospectus or sales package that defines the event/promotion to be marketed, for example sponsorship in the area of athletics, will be reviewed on an annual basis by the appropriate supervisory officer;
 - (iii) a database of prospective sponsors may be established;
 - (iv) sponsorship agreements may be established for specific programs (for example, athletics, yearbook) or events (for example, school plays, tournaments) and/or may occur in conjunction with fundraising events (for example, Jump Rope for Heart);
 - (v) sponsors will not receive exclusive access to all schools or the Board for an indefinite period of time. The length of sponsorship should be extensive enough to allow the name association for a corporate partner with the activity ample opportunity for public recognition and awareness in the community and in the media;
 - (vi) long-term commercial sponsorships of up to a maximum of three years' duration must be (i) approved by Senior Staff prior to signing an agreement; (ii) monitored on an ongoing basis during the life of the agreement by the appropriate principal, department head and supervisory officer(s); and (iii) reviewed by Senior Staff at the end of the three-year period;
 - (vii) when entering into an agreement, all expectations, benefits and exchange of resources will be known and governed by a signed agreement, Form OCDSB 614, in which the sponsor's expectations will be clearly stated, and which will include the following:
 - (A) names of representatives of the sponsor with whom the school/Board/association will work;

- (B) a description of the sponsored program or event;
 - (C) the length of the agreement;
 - (D) the contributions or commitments of the participants to the project or event;
 - (E) objectives for promotional value and financial contributions; and
 - (F) a statement regarding appropriate public recognition.
- b) Sponsors may not request or receive exclusive access to schools or the Board, that is, competitors may not be excluded at the request of the sponsor.

4.6 Donations

The following additional guidelines will apply to donations:

- a) all donations which are consistent with Board policies and procedures and have been deemed acceptable to the Board must be distributed according to the wishes of the donor;
- b) the value of donations must be determined centrally through the Superintendent of Business. A receipt for cash donations or goods will be provided to the donor upon request. A receipt for income tax purposes may also be possible;
- c) all donations will become the property of the Board and will remain under the Board's control;
- d) any equipment (for example, computer equipment) that does not conform to Board standards will not be added to Board inventories and will not be supported by Board training, technical support, or repair services;
- e) the conditions of the donation will be outlined in a letter of understanding signed by the Board and will include:
 - (i) the Board's assessment of the value of the donation;
 - (ii) any information related to the installation, where appropriate; and
 - (iii) details of acknowledgment, where applicable.

4.7 Co-Operative Ventures

The following additional guidelines will apply to co-operative ventures involving the co-development of products or services related to education that are expected to be marketable and hence generate revenue:

- a) each venturer will identify all those who will be involved in the project as part of the initial agreement. Participation is understood to be voluntary;
- b) any direct involvement by students in a workplace setting must be for reasons that are educationally relevant and consistent with principles governing Co-operative Education;
- c) any and all potential for exploiting students as contributors to the venture is understood to be unacceptable. Students will be compensated fairly for any work they do beyond classroom activities to develop the product;

- d) the value of all Board staff time and resources involved in the venture will be calculated and known at regular intervals. This information, along with other relevant data, will be included in a quarterly progress report to the Director of Education;
- e) the joint venturers will develop a business plan setting out:
 - (i) the goals and objectives of the joint venture;
 - (ii) the nature of the product or service;
 - (iii) the roles and responsibilities of all partners ;
 - (iv) a detailed marketing plan;
 - (v) a detailed plan for all other business activities including timelines, resource requirements and budgets;
 - (vi) partners' contributions;
 - (vii) ownership of any intellectual property developed by the venture;
 - (viii) a breakdown of the shares of the venture for each of the partners;
 - (ix) a formula for sharing of revenue;
 - (x) indemnification of the partners for any claims arising out of the joint venture; and
 - (xi) the conditions for termination of participation in the venture.

5.0 REFERENCE DOCUMENTS

The Education Act, 1998, ss. 170, 171, 183, 184, 196, 249

Ethical Guidelines for Business-Education Partnerships, 1995: The Conference Board of Canada

Ontario Regulation 298 s. 25

Board Policy P.045.GOV: Partnerships, Sponsorships, Donations, and Co-operative Ventures

Board Policy P.052.SCO: Fund-raising in Schools

Board Procedure PR.540.SCO: Fund-raising in Schools