

POLICY NCAM-02

Policy Type: Archives & Museum

Subsection: Finance

Policy Title: Northumberland County Archives and Museum Sponsorship Policy

Policy Number: NCAM-02

Policy Approved By:

Effective Date:

Revised:

Applicable To: All members of Council, staff, volunteers, interns and placement students who represent and/or participate in activities and functions on behalf of Northumberland County Archives and Museum. All donors and sponsors providing funds to NCAM operations, programs, and capital expenses.

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1.0 Policy Statement

Northumberland County Archives and Museum (NCAM) welcomes mutually beneficial sponsorships that are consistent with its mandate, supplement Council-approved initiatives, and are considered to be in the public interest.

1.1 Objective(s)

This policy establishes protocol that will guide NCAM in evaluating, soliciting, managing, and reporting on sponsorship opportunities that support exhibitions and programs and preserve and promote the archives and museum's collections. Types of sponsorship and fundraising can include, but are not limited to, corporate sponsorships, individual donations, grants, memberships, fundraising events, naming rights, in-kind contributions, or crowdfunding campaigns.

1.2 Definitions

Donation: a gift or contribution of cash, goods or service given voluntarily toward an event, project, program or corporate asset as a philanthropic act.

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Naming Rights: is the naming of a facility, space or object, after a person or group or through a sponsorship in which a company purchases (cash or other revenue support) the exclusive right to name an asset (facility, room, bench, etc.) for a specific period.

Sponsorship: is a mutually beneficial business arrangement or partnership between the Corporation of the County of Northumberland and an external company, organization or enterprise wherein the external party contributes funds, goods, or services to a municipal project, initiative or service in return for recognition, acknowledgement or other promotional consideration for a specified period of time.

2.0 Sponsorship Agreements

Agreements shall not in any way invoke future consideration, influence, or be perceived to influence the day-to-day business of the County. The value of the agreement must be consistent with the level of recognition or acknowledgement of the sponsor. Nothing may be provided by the County except as expressed in the agreement.

NCAM and/or the creator of any exhibit or program content will maintain intellectual property rights.

2.1 Guidelines for Sponsorship Acceptance

Criteria for accepting sponsorships and donations must align with NCAM's mission, values, and ethical standards. The County must evaluate all such proposals on an individual basis based on the content of the proposal and the target audience. Factors for consideration are the sponsor's reputation, the nature of their business, and any current or potential conflicts of interest.

External organizations or individuals may partner with NCAM in providing programs, events, facilities or activities where such a partnership:

- Is mutually beneficial to both parties.
- Is consistent with the vision, policies and goals of the Corporation of the County of Northumberland and NCAM.
- Is arranged for a fixed term.
- Complies with all federal and provincial statutes, municipal by-laws, corporate policies, and procedures.

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- Does not imply endorsement of the company or its products and services and should prohibit partners from making statements which suggests a company's products and services are endorsed by the Corporation of the County of Northumberland.
- Does not result in or is perceived as giving any preferential treatment outside of the partnership agreement.
- Does not cause a municipal employee to receive any product, service or asset for personal use or gain.

2.2 Restrictions for Sponsorship

The County will not solicit, or accept, naming rights, sponsorship, advertising or donations from companies or individuals that, in the sole discretion of the County, are incompatible with NCAM's goals, mission, values, and ethical standards. Examples include, but are not limited to:

- Third parties that are not in good standing with the County (i.e. currently in violation of a bylaw, under litigation against the County, owe money to the County, or are otherwise disqualified from doing business with the County).
- Third parties that in any manner, portray, promote or condone stereotyping of any group or any form of discrimination prohibited by the Ontario Human Rights Code.
- Third parties that produce, distribute, sell, or promote products or services that may reflect negatively on the County or whose reputation could prove detrimental to the County's image.
- Opportunities that present a real or potential conflict of interest for the County or for the potential sponsor or donor.

Sponsors and donors will not influence exhibition or program content or interfere in the NCAM curatorial team's designs, interpretive plans and goals.

The sponsorship must not create an ongoing financial obligation for the County beyond the term of the agreement.

The County reserves the right to reject any or all unsolicited sponsorships, advertising and donations offered to the County.

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2.3 Agreement Preparation

NCAM staff will prepare each agreement in consultation with the Municipal Solicitor.

Sponsorship and naming agreements are subject to provisions of the Municipal Freedom of Information and Protection of Privacy Act.

2.4 Signing Authority

The CAO, Warden, County Clerk and Treasurer/Director of Finance have the authority to bind the corporation as a statutory officer and are authorized to commit the County to a contract through the execution of a legal agreement. The agreement is to be signed according to delegated approval authorities set out in current Procurement By-laws. Council endorsement may be required in specific instances as determined by the CAO.

2.5 Recognition and Benefits

The recognition and benefits that sponsors will receive is based on their level of contribution and established prior to signing the agreement. This may include acknowledgment in promotional materials, signage at the museum, invitations to exclusive events, or other tailored benefits. Sponsorship activation and fulfillment shall not proceed prior to the execution of an agreement.

2.6 Monitoring and Evaluation

NCAM staff are responsible for monitoring the achievements of sponsorship agreements, objectives, and performance standards. The County reserves the right to terminate an existing sponsorship agreement should conditions arise that make it no longer in the best interests of the County.

2.7 Amendments, Extensions and Renewals

Amendments, extensions or renewals to an agreement may be made when terms and conditions of the agreement have been complied with and it is in the best interest of the County. Changes must be approved by the appropriate authority as set out in current Procurement By-laws.

3.0 Financial Management

The County Finance Department is responsible for:

- validating documentation supplied by sponsors.

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- confirming receipt of the contribution and ensuring accuracy of amounts and/or instalments according to the agreement.
- tracking subsequent payments/ instalments and notifying NCAM staff of deviations from the agreement.
- applying proper GAAP and PSAB accounting treatment for sponsorship revenues and their associated expenses.
 - ensuring revenues are recorded in the proper period and matched to the expenses incurred, for each agreement.
 - identifying terms of the agreements when they relate to restricted or unrestricted contributions.
- ensuring accuracy of financial reporting as it relates to these sponsorship agreements.
- issuing tax receipts (where applicable). Official receipts for income tax purposes shall be authorized by the Treasurer or designate for eligible gifts and gifts in-kind made to the County if requested by the donor and in accordance with Canada Revenue Agency guidelines. Receipts will be made in the name of the donor only.

NCAM staff will be responsible for:

- maintaining accurate records of all real and projected revenues, designating them within NCAM's budget and crediting them to the appropriate accounts.
- Monitoring and evaluating sponsorship agreements and tracking the revenue and expenses associated with each agreement.
- maintaining a donor and sponsor database to keep track of activity and levels of corporate involvement.
- providing Council with an annual report summarizing NCAM's sponsorship activities.

4.0 Administration

With the approval of the CAO and support of Communications, Finance, and the Municipal Solicitor, NCAM staff will be responsible for:

- Ensuring that the opportunity for naming rights, sponsorship, and donations are widely marketed.

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- Setting and monitoring pricing levels and offered benefits, negotiating and approving agreements, managing and serving corporate partners.

4.1 Sponsor Stewardship

NCAM staff will be responsible for establishing and nurturing relationships with potential sponsors and donors that is aligned with County core values and ethics and in accordance with this policy and the respective sponsorship agreements.

NCAM will continually develop strategies for nurturing relationships with sponsors and donors to encourage long-term support such as regular communication, personalized acknowledgments, and updates on the impact of their contributions.

5.0 Policy Review

NCAM-02 Sponsor and Donor Policy will be reviewed, at a minimum, every 3 years.