



**PMI LEBANON CHAPTER**

<b>STANDARD OPERATING PROCEDURE</b>			
SOP NO. PMI-LC-002-01-18 Revision#02			Page No. 1 of 8
Effective Date: 22 Jan. 2018	<b>TITLE:</b> <b>Sponsorship Policy</b>		Superseded Date : None
Prepared by <b>VP Governance</b>	Date 5 Aug. 2017	Approved By <b>Board</b>	Date 14 September 2018
Revised By <b>VP Governance</b>	Date 19 January 2018	Approved By <b>Board</b>	Date 22 January 2018
Revised By	Date	Approved By	Date
Revised By	Date	Approved By	Date
Revised By	Date	Approved By	Date

**Attachment 01: Sponsorship Agreement**

**Document Revisions**

Changes to this policy are made as necessary under the direction of the author, checker and approver. The change log describes new topics and other changes:

<b>Revision</b>	<b>Date</b>	<b>Remarks</b>
00	5 August 2017	Draft Document For board review
01	14 September 2018	Final Revision approved
02	22 January 2018	General Revision

## Policy Distribution

This policy applies to all board members and will be distributed as directed.

## Table of Contents

1. Introduction.....	2
1.1 Generalities .....	2
1.2 Principles .....	3
1.3 Categories of Sponsorship.....	5
<b>1.3.1 Chapter Sponsor</b> .....	5
<b>1.3.2 Major Event Sponsor</b> .....	5
<b>1.3.3 Monthly Talk Sponsor</b> .....	6
2. Record Keeping .....	6
3. Sponsorship Agreement .....	7
3.1 General Terms .....	7

## 1. Introduction

### 1.1 Generalities

The purpose of this policy is to establish the framework and guidelines within PMI Lebanon Chapter for the creation of productive partnerships with other organisations or individuals.

A sponsorship is about relationship building and is a powerful way to build and strengthen partnerships. It is recognised that such alliances can provide important financial and marketing support to potential partners and supporters of PMI Lebanon Chapter while at the same time generate additional revenues to support the Chapter's objectives and mission.

Such relationships can also be fostered and reviewed between other parties seeking contact with PMI Lebanon Chapter members for the purposes of providing additional services and products which may be of value and interest to the members.

All enquiries about sponsorship and advertising with PMI Lebanon Chapter should be addressed to Director, Marketing, PMI Lebanon Chapter.

## 1.2 Principles

The following twelve principles shape our relationships with sponsors.

1. PMI Lebanon Chapter shall not enter into a sponsorship agreement that could limit its ability to carry out its full range of functions impartially. In particular, a sponsorship agreement shall be non-exclusive and not limit PMI Lebanon Chapter from entering into other sponsorship or advertising agreements.
2. There shall be no conflict between the objectives and mission of PMI and the sponsor.
3. PMI Lebanon Chapter should not seek or accept sponsorship from organizations or individuals where the acceptance of the sponsorship would jeopardize the financial, legal or moral integrity of PMI Lebanon Chapter or adversely impact upon its standing and reputation in the community.
4. Sponsorship of PMI Lebanon Chapter or its activities shall not involve explicit endorsement of the sponsor or the sponsor's products.
5. If sponsorship involves the provision of a sponsor's product, PMI Lebanon Chapter shall evaluate the product objectively against operational criteria to make sure that it meets its needs.
6. PMI Lebanon Chapter Board Members and volunteers must neither ask for nor receive any personal benefits from a sponsorship.
7. Sponsorship opportunities shall be made as widely known as possible and PMI Lebanon Chapter shall not limit itself to invited sponsors.
8. Sponsorship proposals shall be assessed against predetermined and publicly available criteria.
9. Sponsorship agreements must be based on a written agreement between the sponsor and the PMI Lebanon Chapter. The agreement shall contain at least the following clauses:
  - **Description of the Sponsorship:** a comprehensive description of the item, project or event around which the sponsorship is constructed, including a list of obligations for both parties. This includes exactly how the sponsor's name or logo will be used, whether it has naming rights, and which party owns any intellectual property developed as part of the sponsorship. PMI Lebanon Chapter has the right to be consulted before any material is developed and may subsequently withhold its approval of the use of the material. This includes the use of PMI Lebanon's name in any promotions.
  - **Terms of Agreement:** the dates for commencement and conclusion of sponsorship

- **Key Personnel:** the names of the individuals from both parties primarily responsible for the sponsorship, and to whom issues regarding the agreement are to be referred
  - **Limitations on and Approval of the Use of PMI Lebanon Chapter's Name:** The following clause limits the use of our name by the sponsor in its own internal and external promotion and advertising: "Neither party, in any situation, whether within or outside the parameters of the sponsorship, shall be deemed to be the spokesperson for, or the representative, of the other party." The use of PMI's or PMI Lebanon Chapter's word, mark, logo or crest must be stipulated in all agreements.
  - **Financial Terms and Schedule of Payments:** the total value and the payment schedule of the sponsorship agreement between the parties will be clearly identified in the agreement. Payments are only allowed by checks issued to PMILC.
  - **Obligations of the Parties to Each Other:** the specification of the responsibility for any market research or program or evaluation duties, reporting, and approvals along with specific criteria and methodologies for the evaluation of the sponsorship.
  - **Breach of Contract:** Prior to initiating formal notification of breach of contract, the parties will undertake all appropriate and reasonable efforts to resolve the matter. Should these efforts not prove successful, either party may notify the other of breach of contract in writing, sent by mail or courier with return receipt requested. Such notification will request a written response by a specific date. Non-compliance will constitute cause for dissolution of the contract.
  - **Right to Discontinue the Sponsored Program or Event:** When circumstances beyond the control of PMI Lebanon Chapter force the cancellation or substitution of a sponsored event or project, PMI Lebanon Chapter reserves the right to cancel without finding itself financially liable or in breach of contract.
  - **Indemnity of PMI Lebanon Chapter Board and Volunteers:** The sponsor by entering into a sponsorship agreement with PMI Lebanon Chapter shall not hold PMI, PMI Lebanon Chapter Board or its volunteers jointly or severally liable for any direct or indirect damages however caused through the sponsorship agreement.
10. All sponsorship agreements must be approved by the Board of PMI Lebanon Chapter and details of the agreements included in the Chapter's annual report.
  11. PMI Lebanon Chapter must make sure that sufficient resources are available to enable the promised sponsor benefits to be delivered.
  12. A current Board Member of the Chapter who is also an employee or officer of another organisation shall take no part in any negotiation of a sponsorship agreement with PMI Lebanon Chapter with that organisation.

### 1.3 Categories of Sponsorship

PMI Lebanon Chapter has two categories of sponsorship as follows.

- **Chapter Sponsor:** Sponsorship of PMI Lebanon Chapter.
- **Major Events Sponsor:** Sponsorship of a major event of PMI Lebanon Chapter.
- **Monthly Talk Sponsor.** Sponsorship of a monthly Chapter Event of PMI Lebanon Chapter excluding the AGM.

The Description of the Sponsorship clause in Principle 9 above shall include but not be limited to these three categories of sponsorship.

The details of the three categories of sponsorship follow.

#### 1.3.1 Chapter Sponsor

Maximum Number: 10 per annum

Sponsor's Benefits:

- Placement of the sponsor's logo and sponsorship status on the PMI Lebanon Chapter website 'home page'. It would be visible on opening the PMI Lebanon home page, identify the sponsor as a 'Partner', and include a link to the sponsor's web site.
- Placing the sponsor's logo and sponsorship status on any e-mail or printed newsletters that the PMI Lebanon Chapter may produce from time to time during the period of the sponsorship.
- Two free registrations to any monthly Chapter Event within one calendar year. These will be tracked and administered through standing events processes.
- The sponsor may display the Lebanon PMI Chapter's logo on the sponsors' website home page with a link to the PMI Lebanon Chapter website home page.
- The sponsor may display the text "Partner of the PMI Lebanon Chapter" and the PMI Lebanon Chapter logo on any sponsor material as approved by the PMI Lebanon Chapter.

#### 1.3.2 Major Event Sponsor

Maximum Number: 10 per major event

Term: The sponsorship is valid from the date the PMI Lebanon Chapter accepts the sponsorship to one calendar month past the event.

Sponsor's Benefits:

- Placement of the sponsor's logo on either the Chapter website's "Events" or "Training" page. It would identify the sponsor as a 'Major Event Sponsor' and include a link to the sponsor's website.
- Placement of the sponsor's logo on any printed newsletters that the PMI Lebanon Chapter may produce associated with the event.

- Two free registrations to any monthly Chapter Event within one calendar year. These will be tracked and administered through standing events processes.
- The sponsor may display the PMI Lebanon Chapter's logo on the sponsor's website home page with a link to the Lebanon Chapter's website home page.
- The sponsor may display the text "Event Sponsor of the PMI Lebanon Chapter" and the PMI Lebanon Chapter logo on any material associated with the event as approved by the PMI Lebanon Chapter.

### **1.3.3 Monthly Talk Sponsor**

Maximum number: One per monthly talk.

Sponsor's Benefits:

The sponsor may choose to do any of the following activities.

- Set up a display at a PMI Lebanon Chapter monthly event and be mentioned by the PMI Lebanon Chapter during the event.
- Provide a brief presentation at the beginning of the event. This session must include content that is of benefit to the members present.
- Accept two free registrations to the event. These will be tracked and administered through standing events processes.
- Distribute promotional materials at the event.

A Monthly talk Sponsor may agree to sponsor any number of PMI Lebanon Chapter talks.

If at any time there is more than one Monthly Talk Sponsor, the PMI Lebanon Chapter shall choose which sponsor may be the sponsor of the next monthly talk. The sponsors shall be chosen in rotation depending on when their respective sponsorship agreements were approved.

## **2. Record Keeping**

It is the responsibility of the Director, Marketing to obtain consent of the board members, manage all correspondence, negotiations and transactions related to PMI Lebanon Chapter sponsorships to maintain auditable records of them.

### 3. Sponsorship Agreement

This is a Sponsorship Agreement between PMI Lebanon Chapter and the Sponsor listed below. The Agreement is made under PMI Lebanon Chapter’s “Sponsorship Policy” version A.

Sponsorship Type	
Duration of Agreement	
Sponsor and Contact	
Contact for PMI Lebanon Chapter	
Description of Benefits	
Financial Terms	
Obligations of Parties	

#### 3.1 General Terms

1. **Limitations on and Approval of the Use of PMI’s or PMI Lebanon Chapter’s Name:** The use of PMI or our name or logos by the sponsor in its own internal and external promotion and advertising is not permitted. In general, neither party to this Agreement, in any situation, whether within or outside the terms of the sponsorship, shall be deemed to be the spokesperson for, or the representative, of the other party.
2. **Breach of Contract:** Prior to initiating formal notification of breach of contract, the parties will undertake all appropriate and reasonable efforts to resolve the matter. Should these efforts not prove successful, either party may notify the other of breach of contract in writing, sent by mail or courier with return receipt requested. Such notification will request a written response by a specific date. Non-compliance will constitute cause for dissolution of the contract.
3. **Right to Discontinue the Sponsored Program or Event:** When circumstances beyond the control of PMI Lebanon Chapter force the cancellation or substitution of a sponsored event or project, PMI Lebanon

Chapter reserves the right to cancel without finding itself financially liable or in breach of contract.

4. **Indemnity of PMI Lebanon Chapter Board and Volunteers:** The sponsor by entering into a sponsorship agreement with PMI Lebanon Chapter shall not hold PMI, PMI Lebanon Chapter Board or its volunteers jointly or severally liable for any direct or indirect damages however caused through the sponsorship agreement.

I agree to the terms of this Sponsorship Agreement:

Sponsor: \_\_\_\_\_ Date:  
\_\_\_\_\_

Board <sup>1</sup>: \_\_\_\_\_ Date:  
\_\_\_\_\_

---

<sup>1</sup> The signature of a Board Director represents the Board of PMI Lebanon Chapter.