



PROJECT MANAGEMENT INSTITUTE
Washington DC Chapter, Inc. (PMIWDC)

A Consistent Leader Serving the Project Management Profession in the Washington, DC Metropolitan Area

Policy Title:	Sponsorship Program
Board sponsor(s):	VP PR/Marketing
Background	The PMIWDC Chapter Board (Board) found it necessary to consider relationships with other organizations and to establish a uniform approach to the sponsorship program. For this reason, on July 24, 2006, the Board chartered the <i>Sponsorship and Advertising Committee</i> to “develop clear policies on sponsorship and advertising, based, in part, on existing policies, but expanded to include activities and events not currently covered.” This revised policy builds on the 2006 sponsorship policy and incorporates changes made to the 2009 operational framework
Purpose:	The purpose of the sponsorship policy is to: <ul style="list-style-type: none"> • Promote consistent implementation of PMIWDC Chapter objectives and administrative processes of the sponsorship program • Achieve Board awareness and solicit participation • Identify responsible parties (e.g., sponsors, sponsorship leads, consultants) • Communicate guiding principles for sponsorship acquisition and servicing • Establish reporting and communication expectations
Scope:	This policy applies to the sponsorship program implemented by the Board for purposes of acquiring and maintaining sponsor partnerships. It does not represent policies that govern advertising.
Policy Description:	<ol style="list-style-type: none"> 1. Guiding Principles: Sponsors may be acquired for all Chapter meetings and events, including, but not limited to, PM Tools, breakfast meetings, career fairs, professional development events, luncheon meetings, and golfing events. <ol style="list-style-type: none"> a. New Events: Event Managers or a Board member shall present proposed sponsorship levels and benefits to the responsible VP and the President Elect. b. Preexisting Events: Event Managers or a Board member shall notify the responsible VP about changes to existing sponsorship levels and benefits offered to sponsors. The notification shall include justification and shall be approved by the responsible VP and President Elect. This includes an offer of a sponsor table to speakers in exchange for speaker fees or pro bono speaker arrangements, and applies to all Chapter events. c. Sustained Corporate Sponsor: The sustained sponsorship program consists of three levels, with benefits ranging from three to twelve months. (See supporting documents.) Chapter and sponsor benefits begin the month after the sponsor payment is received. d. In kind Sponsorship: A sponsorship in kind is when the sponsor provides products or services rather than actual money. The Chapter may acquire in kind sponsorships and shall state the value of the product or service. The Chapter’s Corporate Volunteer Program is an example of an in kind sponsorship. (See supporting documents.) e. Renewal: In January of each fiscal year, levels and benefits for preexisting events and sustained corporate sponsor levels shall be revisited by the VP PR/Marketing, reviewed by the President-elect, and approved by the Board. 2. Responsible Parties: Board Members, Sponsors, Sponsorship Committee Chair, Event Managers, volunteers, PMR, and consultants shall follow sponsorship policy and procedures established or approved by the VP PR/Marketing . Deviations shall be pre-approved by the VP PR/Marketing and the President-elect. 3. Reporting and Communication: No later than March of each fiscal year, the VP PR/Marketing shall communicate Sustained Corporate Sponsorship and other Sponsorship Program offerings and their respective benefits to the Board, Chapter members, and sponsors. Each quarter, the responsible VP will work with Potomac Management Resources (PMR) to report on the status of all sponsors acquired year-to-date.



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Exclusions:	<p>The Chapter <i>shall not</i>:</p> <ul style="list-style-type: none"> • Endorse products or services of any other organization (except PMI or PMI Components) • Co-brand products, services, or events of any other organization (except PMI or PMI Components) • Co-sponsor services or events of any for-profit organization • Enter into an agreement with organizations that neither promote the project management profession nor abide by the PMI member code of ethics • Provide access to the PMI member directory as a Sponsor benefit • Agree to mass distribution to PMIWDC members as a Sponsor benefit • Include email advertising as a Sponsor benefit
Approvals and Contracts	<p>New Sponsorship Offerings: When agreements are not consistent with standard, preexisting Chapter sponsorship offerings, the sponsor, Event Manager or Committee Chair, and a voting Board member shall come to an agreement on the terms expressed as “PMIWDC benefits to Sponsor” and “Sponsor benefits to PMIWDC”. The <i>Sponsorship Agreement</i> shall then be approved by the VP PR/Marketing, President Elect, and a voting Board member.</p> <p>Preexisting Sponsorship Offerings: At least 15 business days before an event, the Event Manager or Committee Chair shall submit the <i>Sponsorship Agreement</i> for review by the VP PR/Marketing, President Elect, and a voting Board member.</p>
Accountability and Responsibility	<p>Board members and Event Managers are encouraged to recommend Chapter sponsors or sponsorship programs in compliance with this policy and taxation rules.</p> <p>The VP PR/Marketing has primary authority for the Sponsorship Program.</p>
Disclosures:	<p>When a sponsor is recommended either directly or indirectly, Board members, Event Managers, or Committee Chairs, or PMIWDC members shall disclose past, present, and future relationships with the company or its primary sponsor representative.</p> <p>In the interest of full disclosure, the Chapter sponsorship policy and information about specific sponsorships shall be made available to the membership.</p>
Policy Review and Evaluation:	In January of each fiscal year, the Board shall review and approve changes to the sponsorship policy.
Date Approved by Board:	November 11, 2008
Effective Date:	November 11, 2008
Supporting Documents:	<p>See also the following companion references:</p> <ol style="list-style-type: none"> 1. PMI Member Code of Ethics 2. PMI Sponsorship and Taxation Rules
Revision History	<p>November 11, 2008 June 12, 2007</p>