MCPB Agenda Item #3 June 5, 2014

MEMORANDUM

DATE:

May 22, 2014

TO:

Montgomery County Planning Board

VIA:

Mary R. Bradford, Director of Parks Many R. Bradford, Director of Parks Many R. Mike Riley, Deputy Director of Parks

FROM:

Kate Stookey, Chief, Public Affairs & Community Partnerships Division

Debbie Rankin, Executive Director, Montgomery Parks Foundation

SUBJECT:

Corporate Sponsorship Program Implementation Plan

Staff Recommendation: Approve the implementation of the Corporate Sponsorship Program as outlined in the staff memo.

BACKGROUND

On January 31, 2013, the Planning Board adopted the Parks Corporate Sponsorship Policy (see circle page 14). This policy was adopted to enable the Montgomery County Department of Parks (Montgomery Parks) to establish mutually beneficial relationships with community organizations and area businesses.

Corporate sponsorship is a business relationship in which two entities exchange "things" of value. The value to the sponsor is typically public recognition, publicity and advertising and marketing opportunities that include the sponsor's name, logo, message and products or services. The value to the sponsored entity is typically cash or in-kind products and services which are budget-relieving and enhance or promote current programs and offerings.

Montgomery Parks' sponsorship efforts have mostly been piecemeal, scattered, and limited to one event or program at a time. There has been no strategic or coordinated approach. Recognizing that our substantial assets, when effectively bundled, strategically leveraged and sold, are likely to yield significant revenue, we issued a Request for Proposals (RFP) in May 2013 to identify a consultant to help us develop a formal framework and program and establish clear guidelines for a comprehensive, consistent and system-wide approach to sponsorship.

The contract was awarded to IEG, LLC, in July 2013. IEG is an expert in the sponsorship arena, with over 30 years of national and international experience developing sponsorship programs for organizations in the private, non-profit and public sectors (you can visit their website at www.sponsorship.com).

Over the past several months, we have worked closely with IEG to:

- Inventory appropriate sponsorable assets within the park system;
- Analyze the viability of the identified assets;
- Create customized, multi-tier sponsorship packages with associated benefits and terms;
- Project anticipated revenue; and
- Determine the staffing levels and resources required to successfully rollout the program.

A Sponsorship Steering Committee, currently comprised of representatives from every division within Montgomery Parks, has been formed to act as an advisory and coordinating committee and actively support the corporate sponsorship program moving forward. More information on this working group can be found in the section on Program Management on **circle page 9**. The recommendations set forth in this staff memo were vetted and approved by the Steering Committee.

GUIDING PRINCIPLES

Corporate Sponsorships must:

- Comply with Montgomery Parks' Corporate Sponsorship Policy;
- Align with Montgomery Parks' mission and values;
- Substantially benefit Montgomery Parks, its programs and/or initiatives;
- Enhance or improve the park visitors' experience; and
- Avoid or minimize adverse impact on the park visitors' experience and the visual qualities of the park environment.

In anticipation of community concerns and sensitivity, our goal is to establish recognition benefits that provide sponsors with visibility and exposure without cluttering the existing park environment. Signage and advertising messages must be appropriate and in keeping with the sponsored asset or program. As is stated in the policy document, M-NCPPC "...intends to preserve its rights and discretion to exercise full editorial control over the placement, content, appearance, and wording of Naming Rights, Advertising Rights, Sponsorship Benefits and related messages." Examples of sponsor recognition signage and communications similar to those we would implement are included on circle pages 22-24.

PROGRAM GOALS AND OBJECTIVES

The goal of the Corporate Sponsorship Program is to facilitate mutually beneficial, relationship-based sponsorships with local, regional, and national commercial businesses and non-profit organizations in an effort to enhance, expand and sustain park assets and programs for the benefit of the public we serve.

The objectives of the Corporate Sponsorship Program are to:

- Develop year-round, fully integrated, multi-tiered, department-wide sponsorship packages;
- Establish and negotiate a fair market value for each sponsorship package level;
- Coordinate all sponsorship sales efforts through a single entity, the Montgomery Parks Foundation;
- Maximize cash and in-kind support for the many facilities and programs within Montgomery Parks;
- Provide sponsors with visibility through on- and off-site sponsorship recognition and advertising messages; and,
- Increase awareness of M-NCPPC Montgomery Parks and its programs and services among new audiences.

SPONSORSHIP LEVELS AND PACKAGE TERMS

IEG has recommended the creation of three sponsorship packages: Mission Sponsor, Community Sponsor and Event/Facility Sponsor. The first two are year-round packages; the third category was developed in recognition of the many loyal, smaller sponsors that have supported single events in the past and to allow for site-specific advertising opportunities outside of the sponsorship program, where feasible and appropriate (e.g., dasher boards at ice rinks).

The pricing, terms, anticipated number of sponsors, and associated recognition and benefits for each sponsorship package are outlined on the following pages. A quick snapshot of the differences between the various levels can be found on **circle page 25**.

IEG has also provided sample case studies showing highlighting examples of sponsorships in other park systems in the US. These are attached on **circle pages 26-31**.

Mission Sponsor

This is the highest level, year-round sponsorship package.

Pricing: \$100,000 per year

Length of Term: Three years

Exclusivity: Category exclusivity in the Mission Sponsor category and

selected Sponsored Platform(s) (see circle page 32 for the

chart of Sponsored Platforms)

Recommended Number of

Sponsors at this Level: 4-6

Recognition and Benefits:

• First choice of title or presenting sponsorship of one Program Platform

- Presenting Sponsor status of one Community Event
- Supporting Sponsor status of remaining Community Events
- Right to use M-NCPPC Montgomery Parks marks/logos in marketing materials to promote association as Mission Sponsor
- Right to develop cause-related fundraising/promotional campaigns to support Montgomery Parks in coordination with Montgomery Parks Foundation
- Right to send information to Montgomery Parks mailing list one time per year (sent by Parks; list not provided to sponsor)
- Right to send information to sponsored event, program or venue list one time per year (sent by Parks; list not provided to sponsor)
- Logo inclusion in all received value-in-kind advertising of sponsored Program Platform and Community Events
- Recognition on Montgomery Parks website, including rotating logo/banner ad on homepage, sponsorship page, and any pages related to selected Program Platform(s) and Community Events
- Inclusion in promotional messaging related to selected Program Platform and Community Events on Facebook and Twitter four times per year
- Acknowledgement as Mission Sponsor in Program Guide one time per year
- Annual spotlight/editorial feature in e-newsletter one time per year
- Inclusion of promotional offer in e-newsletter one time per year
- Logo recognition/mention as Mission Sponsor in monthly e-newsletter, Park Map,
 Program Guide, Regional/Recreational Park Brochures, and other publications related to selected Program Platform(s) and Community Events

- Day-of on-site Mission Sponsor recognition signage during selected Programs and Community Events
- Year round on-site Mission Sponsor recognition signage at signature parks and facilities (see Appendix)
- Year-round advertising signage at sports complexes, including dasher boards at Wheaton Ice Arena and Cabin John Ice Rink, outfield banners at regional/recreational athletic fields, and other designated locations (see Appendix)
- Right to tabling/sampling displays at select regional/recreational parks up to 15 days per year
- Right to tabling/sampling displays at events related to selected Program Platform(s) and Community Events up to two days per event

Community Sponsor

The Community Sponsor package also offers year-round rights and benefits, but with less reach and exposure than the Mission Sponsor level.

Pricing:

\$40,000 per year

Length of Term:

Two years

Exclusivity:

Category exclusivity in the selected Sponsored Platform(s)

Recommended Number of

Sponsors at this Level:

6-8

Recognition and Benefits:

Presenting sponsorship of one Program Platform not selected by a Mission Sponsor

- Presenting Sponsor status of one smaller park-owned event
- Supporting Sponsor status of two Community Events
- Right to use M-NCPPC Montgomery Parks marks/logos in marketing materials to promote association as Community Sponsor
- Right to develop cause-related fundraising/promotional campaigns to support Montgomery Parks in coordination with Montgomery Parks Foundation
- Right to send information to sponsored event, program or venue list one time per year (sent by Parks; list not provided to sponsor)
- Logo inclusion in all received value-in-kind advertising of sponsored Program Platform and Community Events
- Recognition on Montgomery Parks website, including rotating logo/banner ad on Events
 Calendar page, Things to Do page, and Programs and Classes page, and any pages
 related to selected Program Platform(s), Presenting Sponsor Event, and selected
 Community Events
- Inclusion in promotional messaging related to selected Program Platform, Presenting Sponsor Event and selected Community Events on Facebook and Twitter two times per year
- Acknowledgement as Community Sponsor in Program Guide one time per year
- Inclusion of promotional offer in e-newsletter one time per year
- Logo recognition/mention as Community Sponsor in publications related to selected Program Platform(s), Presenting Sponsor Event, and selected Community Events
- Day-of on-site Community Sponsor recognition signage during Presenting Sponsor Event and selected Community Events
- Year round on-site Community Sponsor recognition signage at signature parks and facilities related to selected Program Platform(s)

- Year-round advertising signage at Cabin John Ice Rink, Wheaton Ice Rink, and Wheaton Sports Pavilion
- Right to tabling/sampling displays at select regional/recreational parks up to 5 days per year
- Right to tabling/sampling displays at events related to selected Program Platform(s) and Community Events up to one day per event

Event/Facility Sponsor

The Event/Facility Sponsor package includes rights and benefits to single, smaller events <u>or</u> advertising rights at select facilities and is not year-round.

Pricing: \$2,500 - \$10,000

Length of Term: Negotiable (pending length of event or advertising agreement)

Exclusivity: N/A

Recommended Number of

Sponsors at this Level: Unlimited

Recognition and Benefits:

 Presenting Sponsor status of one smaller park-owned event, if not already presented by Mission or Community Sponsor

- Supporting Sponsor status of one Community Event
- Right to make promotional offer to program/event participants one time per year
- Logo inclusion in all received value-in-kind advertising of sponsored program or event
- Recognition on Montgomery Parks website pages related to sponsored event or program
- Inclusion in promotional messaging related to sponsored program or event on Facebook and Twitter two times per year
- Logo recognition/mention in all collateral and promotional materials related to sponsored event
- Day-of on-site Sponsor recognition signage during sponsored program or event
- Right to tabling/sampling display at sponsored event or programs, 3-5 times per year

OR

 Right to display advertising and promotional messages at select facilities for an agreed upon term

PROGRAM MANAGEMENT

Administration

Administration of the Corporate Sponsorship Program will mirror that of the Individual Park Naming and Dedication Program. The Montgomery County Parks Foundation (Foundation) will administer the program in coordination with Montgomery Parks, negotiate all contracts in coordination with the Steering Committee (see below) and collect all income (cash and in-kind) associated with Corporate Sponsorship opportunities. See the Program Budget section for more information on how the income will be returned to Montgomery Parks.

Manager of Corporate Partnerships

Successful implementation of the corporate sponsorship program will require a full-time, dedicated Manager of Corporate Partnerships. This position will be responsible for the overall strategy, sales and servicing of the program on a year-round basis. All prospective leads for sponsorship at all levels would be referred to this individual for follow up and cultivation to ensure negotiation, approval and recognition benefits follow department policy and are appropriately coordinated at the department level. This position would report directly to the Foundation Executive Director.

A detailed job description can be found on **circle page 33**. Should the Planning Board support the implementation of the Corporate Sponsorship Program as outlined in this document, the Manager of Corporate Partnerships will need to be hired immediately. Initial tasks include the development of a sales and marketing plan, development and production of marketing and promotional materials, establishing relationships within the business community and with community-based organizations, promotion and marketing of the sponsorship packages to prospective sponsors, and negotiating sponsorship agreements.

Administrative and Legal Support

Implementation will require considerable and progressively more administrative and legal support to assist in the preparation and negotiation of contracts, coordination of fulfillment for benefits and recognition, database entry and report generation, and other duties related to the management and servicing of 26 or more corporate relationships. Costs to cover this support are estimated in the budget section of this document.

Sponsorship Steering Committee

As referenced earlier in this memo, a Sponsorship Steering Committee has been formed to act as an advisory and coordinating body and actively support the sponsorship program moving forward. The objectives of this working group are to:

- Recommend potential events, programs and facilities for sponsorship;
- Identify and develop opportunities for sponsor recognition and advertising;
- Determine ways in which sponsors can drive attendance, enhance visitor experience, and reinforce the Montgomery Parks brand;
- Identify and refer prospective sponsors to the Foundation;

- Work with the Foundation to identify appropriate budget-relieving in-kind income opportunities for negotiating purposes;
- Help ensure fulfillment of sponsor benefits; and,
- Actively promote the sponsorship program internally and externally.

This committee is co-chaired by the Executive Director of the Foundation and the Chief of the Public Affairs and Community Partnerships Division of Montgomery Parks and will be managed by the Manager of Corporate Partnerships. The committee will meet monthly until the program is ready for market, at which point meetings will be held on a quarterly basis. All meetings will be open to Montgomery Parks' staff and Foundation staff and trustees.

The Sponsorship Steering Committee is comprised of the following members:

- Executive Director, Montgomery Parks Foundation (co-chair)
- Public Affairs & Community Partnerships, Division Chief (co-chair)
- Manager, Corporate Partnership, Foundation (organizer)
- Enterprise Division, Chief or designee
- HFEE Division, Chief or designee
- Park Planning & Stewardship Division, Chief or designee
- Northern Region Division, Chief or designee
- Southern Region Division, Chief or designee
- Public Affairs & Community Partnerships Division, Volunteer Services Manager or designee
- Parks Directorate (as available)

PROGRAM BUDGET

Based on the valuation from IEG, LLC, Montgomery Parks can expect to generate close to \$1 million in sponsorship revenue once the program is up and running at full capacity. A breakdown of the revenue projection can be found on **circle page 35**. This assumes a dedicated Manager of Corporate Partnerships is in place to implement and manage the program with sufficient legal and administrative support provided.

Anticipated expenditures are outlined in the chart on the next page and include staffing and materials costs to support and promote the program.

	Year 1*	Year 2	Year 3	Year 4 and Beyond
Projected Income	\$200K	\$390K	\$690K	\$980K
Anticipated Expenditures	\$90K-\$150K	\$90K-\$180K	\$90K-\$190K	\$90K-\$200K
Manager, Corporate Sponsorships position	\$50K-\$75K base no commission	\$50K-\$75K base plus commission	\$50K-\$75K base plus commission	\$50K-\$75K base plus commission
Administrative and Legal support	\$20K	\$30K	\$40K	\$50K
Promotional Materials	\$40K	\$30K	\$30K	\$30K

^{*} Year 1 begins when the program is market-ready; see the timeline on circle page 13.

The Foundation will collect all income (cash and in-kind) associated with Corporate Sponsorship opportunities.

- Sponsorship <u>income in the form of in-kind</u> equipment, gear or services will be received and documented by the Foundation and made available as quickly as possible to the designated unit, section or division within the department.
- Sponsorship <u>income in the form of cash</u> will be received and documented by the
 Foundation and used to cover the costs of administering the program and fulfilling the
 recognition benefits associated with sponsorship agreements. Any remaining
 unrestricted net revenue will be held by the Foundation for future use as determined by
 the Director of Parks or designee.

It is Montgomery Parks' intent to direct the incremental net revenue generated through the Corporate Sponsorship Program to support the programs, activities and services valued by the public but not identified as core priorities for tax funding by our cost recovery pyramid (see circle page 36) and introduce new opportunities to connect the public with enjoyable recreational opportunities that encourage healthy lifestyles. Tax funding is and will continue to be used to cover the costs of our core ongoing park maintenance and operations as defined by the cost recovery pyramid; corporate sponsorship is unlikely to ever generate sufficient revenue to be considered a replacement for tax funding.

In addition to in-kind and cash income, relationships with Mission and Community sponsors will increase awareness of Montgomery Parks' facilities, programs and services among the

sponsor's customers and users which is likely to translate into increased use, participation and revenue for the department.

The Manager of Corporate Partnerships would be hired as a term-contract employee of Montgomery Parks and would report directly to the Executive Director of the Foundation. Standard compensation for these types of positions typically includes a lower base salary and a variable commission for any agreements signed. Our recommendation would be to hire this position with a base salary and no commission in the first, building year of the program, and reevaluate transferring employment to the Foundation and adding commission for year two and beyond. Funding to cover the base salary is available in FY15, but dedicated funding would need to be included as appropriate in the FY16 budget.

While budget-relieving in-kind income is valuable and will free up resources for other department priorities, 25% of the sponsorship value will be required as cash income to ensure the hard costs of the program are covered (e.g., staff costs, brochure and signage costs, etc.) and do not adversely impact the department's operating budget.

PROSPECTS

IEG, LLC has conducted research and provided recommendations on the industry categories and companies most likely to support Montgomery Parks through sponsorship. This information can be found on **circle pages 37-45**. Specific lists of companies and sponsored properties within Montgomery County have also been provided.

Once the Manager of Corporate Partnerships is hired, s/he will review this information, create a prospect database, and begin to market and promote the program through outreach and targeted sales calls. Without this dedicated position in place, the program will be unable to move forward.

PROPOSED TIMELINE

		April	May		June		July	₹	August	Septe	September	ğ	October	November	ber
		7 14 21 2	28 5 1	12 19 26	2 9	9 16 23 30	7 14 21	21 28 4	4 11 18 25	7	8 15 22	29 6	13 20 27	_	3 10 17 24
Activity	Responsibility														
Establish Sponsorship Steering Committee	Parks/Foundation														
Steering Committee Meetings								Para to							
Finalize Corporate Sponsorship Implementation Plan	Steering Committee														
Planning Board approval of Implementation Plan	-														
Hire Manager, Corporate Sponsorships (MCP)	Foundation														
Develop Sales and Marketing Plan	MCP, Steering Committee														
Develop Marketing and Promotional Materials	MCP														
Go to market	MCP														

The Maryland-National Capital Park and Planning Commission Montgomery County Department of Parks

Corporate Sponsorship Policy

I. PURPOSE AND SCOPE

The purpose of this policy (**Policy**) is to establish guidelines to govern the Maryland-National Capital Park and Planning Commission (**Commission**) in the development and management of a program in Montgomery County of:

- Naming or renaming Park Assets or Park Programs (as defined below) to signify the name of a Legal Entity (as defined below) in exchange for providing financial or material in-kind support; and
- 2. Entering into sponsorship agreements with Legal Entities (as defined below) under which the Commission recognizes the sponsoring entity in exchange for providing financial or material in-kind support for a specified Park Asset or Park Program (as defined below).

On December 1, 2011, the Planning Board adopted an Individual Park Naming and Dedication Policy that does not relate to the Legal Entities covered under this Policy.

This policy is not applicable to gifts, grants or unsolicited donations undertaken for charitable purposes without a naming or sponsorship arrangement and, further, does not apply to individuals or Legal Entities that have been issued a park permit for a specific event.

II. DEFINITIONS

Planning Board: The Commission's Montgomery County Planning Board.

Commission: The Maryland-National Capital Park and Planning Commission.

Department: The Montgomery County Department of Parks.

Foundation: The Montgomery County Parks Foundation, Inc.

Definitive Agreement: The binding written agreement made by and among the Commission, Foundation, and the appropriate Legal Entity to confer a Naming Right, Advertising Right or Sponsorship Benefit in compliance with this Policy.



Park Asset: Parks amenities such as recreation/athletic fields, playgrounds, pavilions, trails, structures and other facilities, buildings, rooms, landscaping, art or other physical features, in each case, owned, operated or managed by the Commission in Montgomery County, Maryland, and deemed eligible jointly by the Commission and the Department for Naming Rights and/or Advertising Rights and by the Department for Sponsorship Benefits. Entire parks, regardless of classification, are excluded and not eligible for Naming Rights, Advertising Rights or Sponsorship Benefits.

Park Program: (a) Recreational or interpretive programs, services or similar events that are owned, operated or managed by the Commission in Montgomery County, Maryland; or (b) functions, programs or services provided by the Department in connection with Department operations and deemed eligible by the Department for Naming Rights, Sponsorship Benefits and/or Advertising Rights.

Governmental Entity (Entities): The Government of the United States, the State of Maryland, another state, or any agency, unit, political subdivision or instrumentality thereof.

Legal Entity (Entities): A corporation, unincorporated association, limited liability company, partnership, trust, foundation or other legal entity (whether organized for profit or not) that is engaged in commercial activity and not an individual or Governmental Entity.

Naming Right: A commercial benefit of specified duration that: (a) is established subject to the terms of a Definitive Agreement which conforms to this Policy and (b) obligates the Commission to signify the name, trade name or trademark of a designated Legal Entity as part of the name of the Park Asset(s) or Park Program(s) specified in the Definitive Agreement.

Advertising Right: A commercial benefit of specified duration that: (a) is established subject to the terms of a Definitive Agreement which conforms to this Policy and (b) obligates the Commission to allow the promotion of the services, products or activities of a designated Legal Entity within the property of the Park Asset(s) specified in the Definitive Agreement.

Sponsorship Benefit: A commercial benefit of specified duration that: (a) is established subject to the terms of a Definitive Agreement which conform to this Policy and (b) obligates the Commission to identify the name, trade name or trademark of a designated Legal Entity as a "sponsor" of the Park Asset(s) or Park Program(s) specified in the Definitive Agreement.



III. POLICY STATEMENT

The Planning Board has determined that this Corporate Naming and Sponsorship Policy is necessary and appropriate to provide revenue for the benefit of the Commission that is essential to develop, maintain, improve, expand, support, preserve, fund, encourage and sustain its Park Assets and Park Programs for the fiscal benefit of users and the community at large.

In an effort to utilize and maximize the community's resources, it is in the best interest of the Commission to create and enhance relationships with corporations and other organizations through commercial sponsorships and naming arrangements. This goal can be accomplished by providing local, regional, and national businesses and other commercial enterprises a method to become associated and involved with the many facilities, activities and programs provided by the Commission. The Commission delivers quality, life-enriching activities to a broad base of the community. This translates into exceptional visibility for sponsors and supporters. It is the goal of this policy to further these opportunities for the ultimate benefit of the public.

IV. GENERAL PROVISIONS: NAMING RIGHTS, ADVERTISING RIGHTS, AND SPONSORSHIP BENEFITS

- A. <u>Editorial Discretion</u>. The Commission intends to preserve its rights and discretion to exercise full editorial control over the placement, content, appearance, and wording of Naming Rights, Sponsorship Benefits and related messages. It is the intent of this policy to provide sponsors with visibility through sponsorship recognition and advertising messages and avoid or minimize adverse impact on the park visitors' overall experience and the visual qualities of the park environment.
- B. <u>Eligibility Criteria</u>. Except as provided directly below for the purpose of a Governmental Entity:
 - a. Naming Rights, Advertising Rights, and Sponsorships must be for a commercial purpose and the promotion of any non-commercial enterprise is not permitted in the limited forum created by this policy.
 - b. Naming Rights, Advertising Rights or Sponsorship Benefits are further limited to the promotion or recognition of commercial enterprise and commercial activities that do not compete, impair or conflict with, the mission, policies, goals or operations of the Commission, the park system or designated Park Assets or Park Programs.
 - Naming Rights, Advertising Rights, or Sponsorship Benefits for a Governmental Entity may be considered for non-commercial purposes,



including proprietary and governmental functions of the entity involved; provided, however, that any promotion or recognition of a Governmental Entity must not compete, impair or conflict with the mission, policies, goals or operations of the Commission, the park system or designated Park Assets or Park Programs, and must otherwise comply fully with the conditions and requirements applicable generally in this Policy to a Legal Entity.

- d. Naming Rights, Advertising Rights or Sponsorship Benefits must not include depictions, words or phrases that are reasonably deemed to be harmful or otherwise developmentally inappropriate for the purpose of communication with, or public display to, children under six years of age. Examples of depictions, words or phrases that may be rejected under this Policy are those which:
 - Are sexually suggestive or obscene;
 - Promote unlawful discrimination on the basis of race, ethnicity, religion, or any other classification protected by law;
 - Connote inappropriate violence or intimidation;
 - Relate events, activities or behaviors that are criminal or otherwise violate law (including without limitation, violations or applicable environmental, controlled substance or safety laws); or
 - Promote activities or products that are reasonably determined to be detrimental to the public health or safety.
- C. <u>Combinations Authorized</u>. A Definitive Agreement may include the combination of Sponsorship Benefits, Advertising Rights and Naming Rights.
- D. No Abrogation of Governmental Authority. A Definitive Agreement shall not confer on any person the enforceable power to direct, or implied power to direct, the Commission, the Department, the Planning Board or any Commission employee on matters of policy or any other governmental process, and any provision in such an agreement which purports otherwise is void *ab initio*. Without limiting the generality of the foregoing, the Planning Board will not consider an existing or future Naming Right, Advertising Right or Sponsorship Benefit in connection with the adjudication of any planning, zoning, subdivision or other regulatory activity authorized under the Land Use Article of the Maryland Annotated Code or the Montgomery County Code.
- E. <u>No Property Interest in Park Assets</u>. A Definitive Agreement shall not confer on any person an enforceable right, entitlement, or other property interest of any sort



relating to the use, possession or control any Park Assets, real or personal properties (including, without limitation, an exclusive right to use any Park Asset), except as to a limited and non-exclusive right to use Commission trademarks or other intellectual property which may be authorized in the Definitive Agreement (Section IV(D) below). The specific or periodic use of any Park Asset by a party to a Definitive Agreement may only be authorized by park permit evaluated and approved by the Department in the ordinary course, and such use shall be subject to the party's strict compliance with the terms of any such permit and the Definitive Agreement. A Definitive Agreement may impose on the Department reasonable operating, maintenance or performance standards applicable to a Park Asset, and the Department may agree to undertake reasonable efforts to achieve compliance with those standards.

- F. No Rights of Control Over Park Programs. A Definitive Agreement shall not confer on any person the enforceable power to direct or control, or implied power to direct or control, the Commission, the Department, the Planning Board, or any Commission employee or agent, relating to the operation of any Park Program, or otherwise limiting the discretion to operate a Park Program in a manner that comports with applicable laws, best practices, or the Commission's best interests, as determined in the Commission's sole, exclusive and unreviewable discretion. A Definitive Agreement may impose on the Department reasonable operating or performance standards applicable to a Park Program and the Department may agree to undertake reasonable efforts to achieve compliance with those standards.
- G. Compliance With Law and Regulations Required.
 - [1] A Naming Right, Advertising Right or Sponsorship Benefit pertaining to a Park Asset may not be granted for any venue unless the use or occurrence of the specific products, services, conduct or activity associated with that name: (1) would be lawful for both Commission employees and patrons, (2) would not violate Commission rules and regulations, and (3) would not conflict with the orderly operation of the Park Asset, all as determined for the specific venue where the Naming Right is intended for public display or dissemination. By way of illustration, and not in limitation, a Naming Right may not be granted for a Legal Entity associated with cigarettes or alcoholic beverages for any Park Asset where smoking or consuming those beverages is prohibited, respectively.
 - [2] A Naming Right, Advertising Right or Sponsorship Benefit pertaining to a Park Program may not be granted unless the use or occurrence of the specific products, services, conduct or activity associated with that sponsor: (1) would be lawful for both Commission employees and patrons, (2) would not violate Commission rules and regulations, and (3) does not conflict with the specific Park Program, activity, facility or audience, all as determined for the program or venue where the Sponsorship Benefits are directed for public display or dissemination. By way of illustration, and not in limitation, a Sponsorship



Benefit for a product with substantial health risks may conflict with a Park Program intended to promote the health of children or youth, and may not be granted on that basis.

- H. No Endorsement. The Legal Entity entitled to a Naming Right, Advertising Right or Sponsorship Benefit shall not imply, suggest or publicize any inference to indicate that the Commission (Planning Board or Department) officially or otherwise commercially endorses the purchase and/or consumption of any product, service, activity or conduct. Any permission granted for a Legal Entity to use the Commission's name, logo or other intellectual property in connection with a Naming Right, Advertising Right or Sponsorship Benefit must be non-exclusive and specifically authorized under a Definitive Agreement, and the entity must expressly warrant its strict compliance with the terms of such use as granted.
- I. <u>Disputes</u>. Any applicant for a Naming Right, Advertising Right or Sponsorship Benefit who is aggrieved by a decision of the Foundation or Department may appeal that decision to the Planning Board. The Planning Board will provide the applicant with an opportunity to be heard and consider the basis of appeal on the merits. After due consideration, the Planning Board will provide its decision on the appeal in writing and that decision will be final.

V. GUIDELINES: NAMING RIGHTS AND ADVERTISING RIGHTS

- A. Fiscal Benefit. A Naming Right or Advertising Right will be granted for a Park Asset only if (a) the fiscal benefit derived by the Commission is substantial and commensurate with the value of the specific Park Asset involved, its physical or geographical significance, or the cost to repair, renovate or maintain that Park Asset, and (b) the Naming Right or Advertising Right does not conflict or impair compliance with any outstanding or potential tax-exempt bond obligation related to the Park Asset as determined by the Secretary-Treasurer for Commission-issued bonds or by the County Finance Director for County-issued bonds. A Naming Right will be granted for a Park Program only if the fiscal benefit derived by the Commission is appropriate in relation to the cost of operating the Park Program. The sufficiency of any fiscal benefit to be derived for a Naming Right will be determined at the discretion of the Director of the Department in consultation with the Secretary-Treasurer of the Commission, as appropriate.
- B. <u>Duration</u>. Each Definitive Agreement granting a Naming Right pertaining to a Park Asset must specify an appropriate term. A Naming Right pertaining to a Park Program (including an event) should be of an appropriate duration determined in relation to the specific program involved and the fiscal benefit derived by the Commission.



- C. <u>Brevity</u>. Where facility, building, landscape area, programs, or other related Commission asset is named for a Legal Entity, the name used should normally be the shortest name possible.
- D. <u>Limitations on Naming Rights</u>. Naming Rights will not be considered for entire parks regardless of classification. Only Park Assets that are facilities within parks (such as dog parks, ice rinks, playgrounds, etc.) will be eligible for Naming Rights.
- E. <u>Commercial Content For Advertising</u>. Subject to the eligibility criteria set forth above in this Policy, the design, layout and content of any Advertising messages must be commercially reasonable under the circumstances and approved by the Department prior to placement.

VI. GUIDELINES: SPONSORSHIPS

- A. <u>Fiscal Benefit</u>. Sponsorship Benefits will be granted for a Park Asset or Park Program only if the fiscal benefit derived by the Commission is appropriate. The sufficiency of any fiscal benefit to be derived for a Sponsorship Benefit will be determined in the discretion of the Director of the Department. The fiscal benefit derived from any Sponsorship should, at a minimum, be sufficient to cover:
 - All or a proportionate percentage of annual maintenance and/or program expenses for the Park Asset or Park Program being sponsored during the full term of the sponsorship;
 - Direct expenses incurred by the Department, including design, production and installation costs for signage and other recognition benefits; and,
 - An administrative fee for the Foundation of up to 12%.
- B. <u>Commercial Content For Sponsorships</u>. Sponsorship recognition messages may identify the Legal Entity but must not constitute advertising. Subject to the eligibility criteria set forth above in this Policy, the following content is ordinarily deemed appropriate:
 - The legally recognized name, trade name, or trademark of the sponsoring organization.
 - The sponsor's organizational slogan.
 - The sponsor's product or service line, described in brief, generic, objective terms.
 - Brief contact information for the sponsor's organization, such as phone number, address, or website.



VII. ADMINISTRATION

Pursuant to a written agreement between the Foundation and the Commission approved by the Planning Board and Foundation for the purpose of incorporating and implementing this policy, the process for Corporate Naming and Sponsorships will be administered by the Foundation in coordination with the Commission and the Department. This process includes, but is not limited to the marketing of Corporate Naming and Sponsorship opportunities, renaming, advertising, negotiating terms of Definitive Agreements, and presenting those agreements to the Commission or Department, as outlined below, for approval.

The Foundation is authorized to enter into negotiation with prospective sponsors for Park Assets and Park Programs deemed eligible by the Director of the Department and the Secretary-Treasurer per the criteria outlined in this policy. Terms negotiated by the Foundation must be approved by the Director of the Department and, if so approved, by the Executive Director or designee, prior to the execution of a Definitive Agreement. Signature authority for Definitive Agreements is designated as outlined below:

- A) Definitive Agreements for Park Assets that include Naming Rights require signature authorization by the Commission's Executive Director.
- B) Signature authority for Definitive Agreements for: (a) Park Programs that include Sponsorship Benefits, Naming Rights and/or Advertising Rights and/or (b) Park Assets that include Sponsorship Benefits and/or Advertising Rights may be delegated to the Director of the Department in writing by the Executive Director.

Each Definitive Agreement must include provisions for termination at will by the Commission under appropriate circumstances determined in the sole discretion of the Commission's Office of General Counsel, including without limitation, in the event (a) the Legal Entity or Governmental Entity becomes insolvent or files for bankruptcy, (b) a court or administrative tribunal of competent jurisdiction finds the entity has violated a law or regulation pertaining to unfair business or employment practices, or (c) activities involving moral turpitude.

The development of tiered sponsorship levels identifying the various Park Assets and Programs available for sponsorship and associated recognition benefits and standards will be subject to public review and presented to the Planning Board for approval before the program is implemented. At this time, thresholds for various levels of approval authority will be established for the Planning Board, Commission and Department.

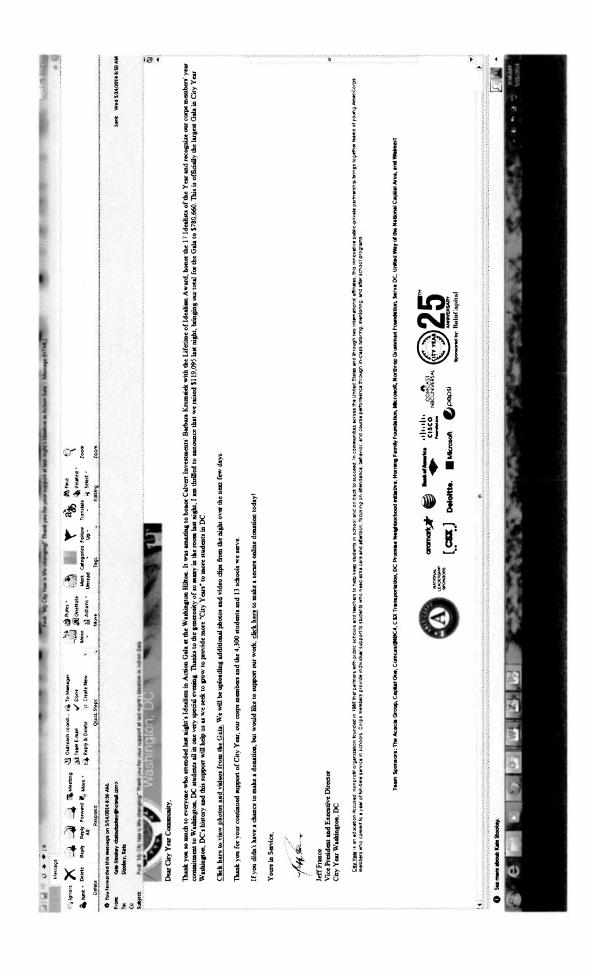
Commencing six (6) months after the adoption of this policy by the Planning Board and every six (6) months thereafter, the Foundation and the Department will provide to the Planning Board, a description of the Definitive Agreements that have been approved and Park Assets and Programs that have been sponsored as a result of this Policy.

The Department is authorized to promulgate appropriate standards, policies and regulations necessary to effectuate the purpose of this policy.









	PACKAGING ST	RATEGY SNAPSHO	Г	
SPONSOR LEVEL	# OF PARTNERS	CONTRACT TERM	PROMOTIONAL TIMEFRAME	ANUUAL COMMITMENT
Mission Partner	4 to 6	3 Years	Year-Round	\$100,000
Community Partner	6 to 8	2 Years	Year-Round	\$40,000
Program/Event Sponsor	Unlimited	2-3 months	Program/Event Timeframe Only	\$2,500 - \$10,000

Program/Event Sponsor	Unlimited	2-3 months	Program/Event Timeframe Only
			the state of the s
DICHTS & BENEFITS	SORED PLATFORM	STREET.	Start Book of
RIGHTS & BENEFITS		ar / ijri	ST SHOPE
	, anssio	OMM	VEW.
SPON	SORED PLATFORM		
Category Exclusivity across MCP	0		
First choice of title or presenting sponsorship of one MCP year- round program, event or event series	•		
Presenting Sponsor status of one Community Event	•	100 TO 10	
First option to pursue venue naming rights	•		
	NOTIONAL RIGHTS		
License to use MCP marks and logos in advertising, promotions and/or packaging	•	•	•
Use of sponsored platform marks and Logos	•	•	
Make special offer to MCP audiences	•	•	
Conduct awareness/promotional campaign	•	•	
Run one or more pre-approved MCP-endorsed fundraising offers	•	•	With the state of the state of
Pass through or conduct a joint promotion with MCP pre-		•	•
approved retailers, vendors or business partners Co-create/co-brand informational materials/content in	_	_	THE RESIDENCE AND ADDRESS OF THE PERSON NAMED IN
connection with marketing or program platform	•	•	THE PARTY NAMED IN
Promotional/Activation Fund	\$5,000	\$2,500	THE SECOND SHIPLES SHOWING REPORT
	NTENT ACCESS		
Joint Press Release announcing relationship Opportunity to include MCP materials in Sponsor's promotional		_	
communications	•	•	BOOK REPORTED
Access to MCP subject matter experts	•	•	
Access to MCP campaign quotes/content for company press releases	•	•	2 - 3 - 3
Photo opportunities with MCP executives/staff/speakers at VIP	•	•	
functions	_	Service Continue Town	
Opportunity to provide content on MCP website Opportunity to create microsites to educate consumer about		EIS CE	NEG BURNERS
brand's relationship with MCP	. •		自然的情况 然为1000000000000000000000000000000000000
	ACCESS & NETWOR	KING	
pportun ost roun or ocus group audiences	•		
	_	Name and Address of the Owner, where the Owner, which is the Owner, where the Owner, which is the Owner, where the Owner, which is the Owner, whic	STATE OF THE PARTY
Opportunity for sponsor to present relevant	•	•	
Industry/recruitment/education content at in-person meetings Opportunity to develop opt-in survey to diseminate to MCP		Acres de la Constantina del Constantina de la Co	
audlence or segment of audience			MOTES PLONE
Opportunity to include company question in MCP surveys		DO STREET TOTAL	
Access to MCP audience research results		0	THE SEA OF SEA OF SEA
IIP volunteer/participation opportunities Ticket/Hospitality/Facility Rental Fund	\$5,000	\$2,500	THE PERSON NAMED IN
	ING LIST/INSERTS	, V2,500	
Use of MCP mailing list	1	探测器处理	NAME OF STREET
Use of Recreational Department mailing that	1	Control of the Contro	SECTION AND DESCRIPTION OF THE PERSON OF THE
Use of community event maili	1	BHILIDANIC SCHOOL	1
	ANTEED VISIBILITY		
sor ID in all received VIK advertising of sponsored	•		CONTRACTOR OF THE PARTY OF THE
component and community event	NUMBER OF STREET	2834	To be
Sponsor banner ad on: MCP Homepage	0	P VIOLET STORY	
Brookside Nature Center	•		
Events Calendar Page	• 1	0	the second second
Things to Do Page	•	•	The second second
Programs and Classes Page		CONCUMBER OF STREET	THE RESERVE
Sponsor editorial feature on MCP website Presenting Sponsor iD on MCP website on all pages describing	1 1	Harris Briefle	
Sponsored Program/Events	•		
Presenting Sponsor ID on MCP website on all pages describing	•	To the same	
sponsored Community Event			53 11 32 12 13 13 1
Opportunity to create contests/podcasts/videos/live chats in	•		2000
connection with marketing platform or co-created initiatives ID on MCP Facebook & Twitter pages		2	PET SCHOOL SPICE
ID on third-party partner's Facebook & Twitter pages	4	2	2
Shared Thank You recognition in E-newsletter for Presenting	1		
Sponsor Community Event			Art Constant
Annual spotlight/feature in Montgomery County Guide 10 on sponsor recognition signage at Nature Centers	1	NAME OF TAXABLE PARTY.	MANAGER AND THE PARTY OF THE PA
Advertising signage at Ice Rinks and Sports Pavillon		•	
D on sponsor recognition signage at:	BIOLINES O	NAME OF STREET	
Black Hitl Regional Park	0	0	The State of
Cabin John Regional Park		•	September 1
Little Bennett Regional Park	IPLING/DISPLAY		
SAM light to lease retail apace at parks and facilities	ii dito/bisplat	0	THE PERSON NAMED IN
Distribution of sponsor materials in Community Centers &			Charles of the
Nature Centers	-	-	经通过 医神经性
Temporary display booth at select regional/recreational parks	15	5	CONTRACTOR OF THE PARTY OF THE
Sampling/Displey booth at select Community Events			
Sampling/Displey booth at during:			以 在的数据包括
Garden of Lights Festival	2	1	WEST STATE OF THE STATE OF
Wings of Faricy	2	1	有限的特殊等的
Outdoor Concert Series OPPORTUNITY TO	PROVIDE PRODU	T IN-KIND	TALE STATE OF THE
portuni o na tin connection w	PROVIDE PHODO	CI IN-MINU	THE SAME STATE AND ADDRESS OF THE
sponsorship and sponsored platform	_	•	DESCRIPTION S
introductions to third-party purchasing officials involved in MCP- related businesses	•	•	THE PROPERTY OF
	L		and the last of th

Dominion and Virginia Department of Conservation and Recreation

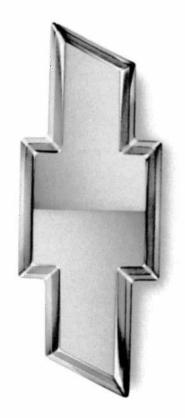
- Dominion gave \$300,000 for the naming rights to a specific project within Virginia State Parks
- The project was to provide touchscreen information kiosks
- Virtual tours of the park
- Access GPS-based trail information
- Printable guides and maps
- Wildlife spotting guides
- Opportunity for Dominion to bring cutting edge technology to park visitors and enhance their experience





CASE STUDY: CHEVROLET AND CALIFORNIA STATE PARKS

- Chevrolet provided free charging stations for electric vehicles at two high-profile state parks in California
- Instillation of the charging stations is a part of the "Cool Parks" initiative by California State Parks
- Seeks to educate park
 visitors and motivate the
 broader public about climate
 change





CASE STUDY: VERIZON WIRELESS AND GEORGIA DEPARTMENT OF NATURAL RESOURCES

Verizon Wireless provided funding for tools and supplies to the Boy Scouts to perform maintenance of trials, cleaning up waterways and building bridges and park benches



In return Georgia recognized Verizon Wireless in publicity materials and on the Georgia Department of Natural Resources website





DEPARTMENT OF NATURAL RESOURCES

CASE STUDY: AT&T AND CITY PARKS **FOUNDATION**

- AT&T was the presenting sponsor of SummerStage
- A free performing arts festival in Central Park and parks throughout the 5 boroughs
- AT&T provided free charging stations for festival attendees
- AT&T provided free WiFi service at all SummerStage locations





CASE STUDY: PARK SERIES

RIVER FLICKS

- Movie series in Hudson River Park in NYC presented by AT&T, sponsored by GoGo Squeez
- As part of its mobile-marketing initiative, the GoGo Squeez mobile playground provided samples to attendees
- Brand was able to engage with children and showcase their brand attitude (fun) with those in attendance



Hudson River Park





CASE STUDY: SOUTHWEST AIRLINES AND PIEDMONT PARK

Sponsorship supports Park Care and Conservation and includes a hospitality area at the park.

- Southwest Porch at Park Tavern
- Southwest Skating Rink
- Southwest-inspired Menu Items at Park Tavern restaurant





MISSION PARTNER: RIGHTS AND BENEFITS

SPONSORED EVENTS AND PROGRAMS

sponsorship of one (1) Montgomery Parks year-round program, Mission Partners will have first choice of title or presenting event or event series

COMMUNITY	Garden of Lights	Wings of Fancy	Harvest Festival	Children's Day	Haunted	Outdoor Concert Series	Other
EDUCATION	Lectures	Workshops					
NATURE, CONSERVATION & ENVIRONMENT	Classes	Hikes/Tours	Programs	Public/Community Gardens	Green Matters Symposium	Nature Centers	
EQUESTRIAN SPORTS & PROGRAMS	ressons	Camps	Showing	Clinics			
ADULT SPORTS & PROGRAMS	Ice Hockey	Ice Skating	Tennis	Soccer			
ARTS & CULTURE PROGRAMS	Arts	History	Underground Railroad Experience	Emancipation Day	History in the Parks	Archeology Program	
YOUTH SPORTS & PROGRAMS	Ice Hockey	Figure Skating	Tennis	Soccer	Baseball/ Softball	Lacrosse	
FITNESS & HEALTHY LIFESTYLE	Cooking	Fitness Classes	Running				

Manager, Corporate Partnerships

Montgomery Parks Foundation

The Manager of Corporate Partnerships will be responsible for the identification, cultivation and solicitation of new corporate sponsorship opportunities that align with Montgomery Parks' mission and objectives. The Manager should support the program in the capacities outlined below:

Major Duties and Responsibilities

- In partnership with the Executive Director of Montgomery Parks Foundation and Public Affairs & Community Partnerships Division Chief; formulate and execute annual sponsorship strategies including planning, implementing, evaluating and enhancing the affinity partner program
- Create a master strategic partnership contract template for each corporate marketing package level to use for all deals
- Develop and monitor long and short-term goals to increase marketing-based partnership revenue
- Ensure that sponsorships are coordinated across all relevant departments
- Plan and conduct annual meeting(s) with each high-level partner at their respective offices to evaluate sponsorship
- Help plan and conduct annual Montgomery Parks Sponsorship Summit
- Work with appropriate staff and Planning Board to ensure that sponsor relationships are well maintained

Position Details

- Reports directly to Executive Director of Montgomery Parks Foundation
- Serves as central liaison between internal departments and appropriate third-party agencies
- 100% of time dedicated to creating and sustaining corporate sponsorship relationships

Strategy/Management (20%)

- Manage communications related to corporate sponsorships for all audiences: visitors, members, donors, staff, board, etc...
- Report on corporate marketing sponsorships and sales pipeline
- Work with appropriate staff to conduct visitor/attendee surveys regarding attitudes and awareness of partners and report results to internal stakeholders and partners. Cross-reference research needs with other departments to avoid overlapping efforts

Sales (70%)

- Serve as lead sponsorship salesperson
- Tailor sales materials, packages, marketing platforms and activation ideas based on conversations with each company and conduct additional research on prospects as needed
- Work with various internal departments and third party agencies to coordinate pitches and prevent unintentional overlap of corporate solicitations
- Identify, prioritize and pitch new potential sponsors
- Implement partner screening process and develop key messages around approved sponsorships
- Negotiate all corporate sponsorships with prospects

Servicing (10%)

- Serve as liaison and main contact for all sponsors
- Oversee servicing and fulfillment

- Work to renew all sponsor agreements as needed
- Work with other departments and third party agencies to coordinate fulfillment of sponsor benefits
- Track partner objectives, marketing platforms, spends and activation efforts
- Produce customized fulfillment reports for each partner, outlining marketing benefits delivered
- Create Corporate Marketing Partnerships Steering Committee and lead regularly scheduled meetings

Qualifications

- 7-10 years in related field with background in development and sponsorship sales
- Extensive knowledge of/connectivity to corporate sponsorship community, to include national affiliations
- Four-year degree. Business Administration, Finance, Marketing or related area of study desired
- Knowledge of park properties, festivals and events and government agency experience preferred
- Experience selling five-and-six figure corporate sponsorship deals
- Other Requirements as Defined by Montgomery Parks

Conditions:

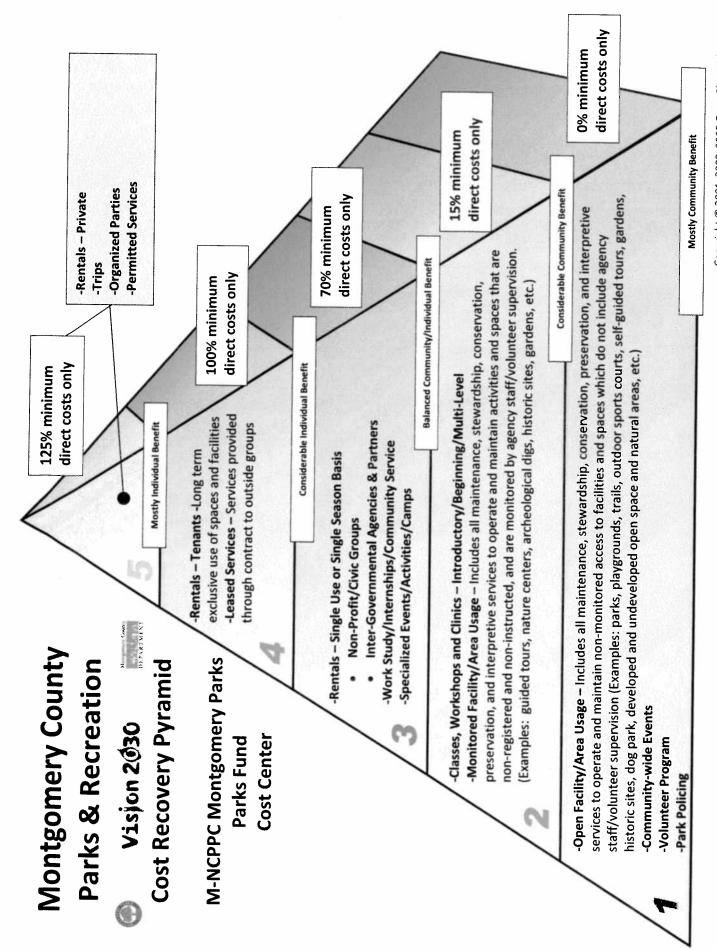
- This is a salaried/exempt M-F position with occasional evening and weekend hours required
- Successful candidate is required to hold a valid driver's license and have the ability to travel a minimum of 10% per week.

Other:

Writing samples may be requested of candidates selected to interview

BREAKDOWN OF SPONSORSHIP REVENUE

Year	Opportunity	# of Partners	Fee	Total
2014	Mission Partner Community Partner Program/Event Sponsors	- 04	\$100,000 \$40,000 \$5,000	\$200,000
2015	Mission Partner Community Partner Program/Event Sponsors	040	\$100,000 \$40,000 \$5,000	\$390,000
2016	Mission Partner Community Partner Program/Event Sponsors	4 % 0	\$100,000 \$40,000 \$5,000	\$690,000
Annual Revenue Potential	Mission Partner Community Partner Program/Event Sponsors	9 8 7	\$100,000 \$40,000 \$5,000	\$980,000

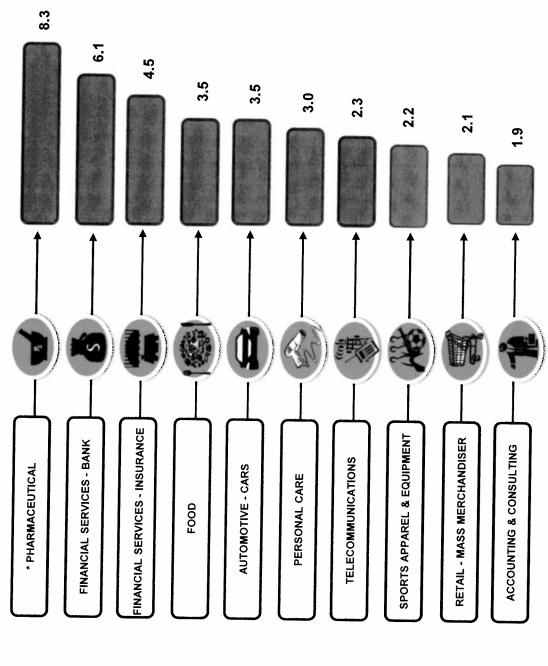


ABOUT THE DATA

Parks. IEG researched properties across the United States. IEG also properties that share common attributes with Montgomery County researched properties in the Washington, D.C. DMA to provide a To create this report, IEG compiled a custom set of data from snapshot of sponsorship activity for the area.

Conservancy, National Park Foundation, United Way of America, National Parks Conservation Association and American Forests Properties featured in the data set include Appalachian Trail among 458 other organizations. The Washington, D.C. data set includes the AT&T National (PGA), Blossom Festival and John F. Kennedy Center for the Performing Smithsonian Institution, Washington Redskins, National Cherry Arts among other properties.

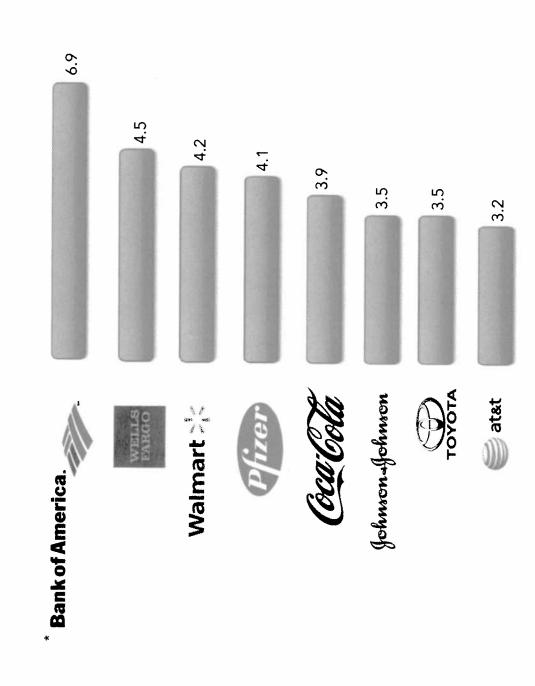
MOST ACTIVE CATEGORIES SPONSORING CAUSE-RELATED PROPERTIES



*Explanation of Index: Pharmaceutical companies are 8.3 times more likely to sponsor causes than the average of all other sponsor categories in this data set.

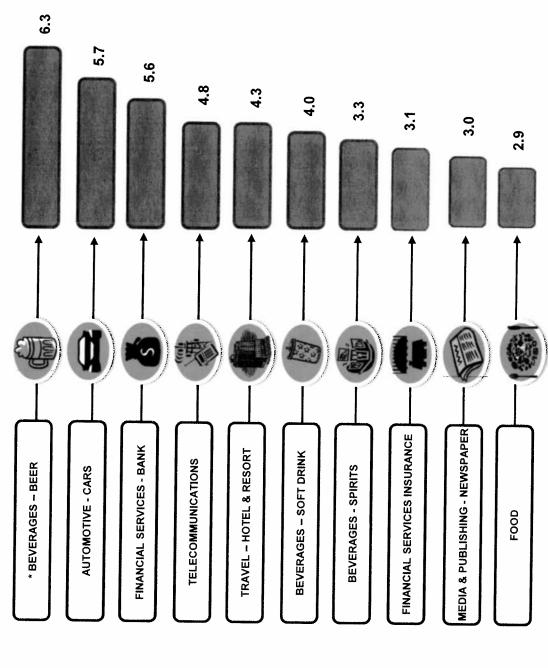


TOP CORPORATE OWNERS SPONSORING CAUSES



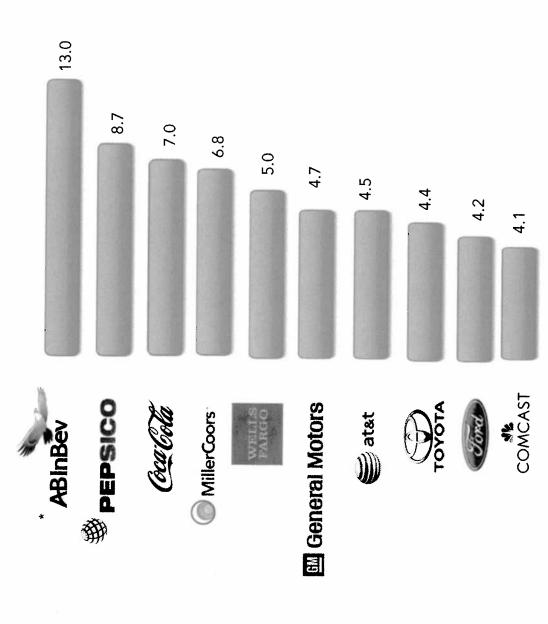
*Explanation of Index: Bank of America is 6.9 times more likely to sponsor causes than the average of all other companies in this data set.

MOST ACTIVE CATEGORIES SPONSORING FESTIVAL & EVENT PROPERTIES



alcohol in parks, except at some events centers, we wanted to provide the most accurate data from our database. *Explanation of Index: Beer companies are 6.3 times more likely to sponsor festivals and events than the average of all other sponsor categories in this data set. While IEG recognizes that Montgomery Parks does not allow

TOP CORPORATE OWNERS SPONSORING FESTIVALS & EVENTS

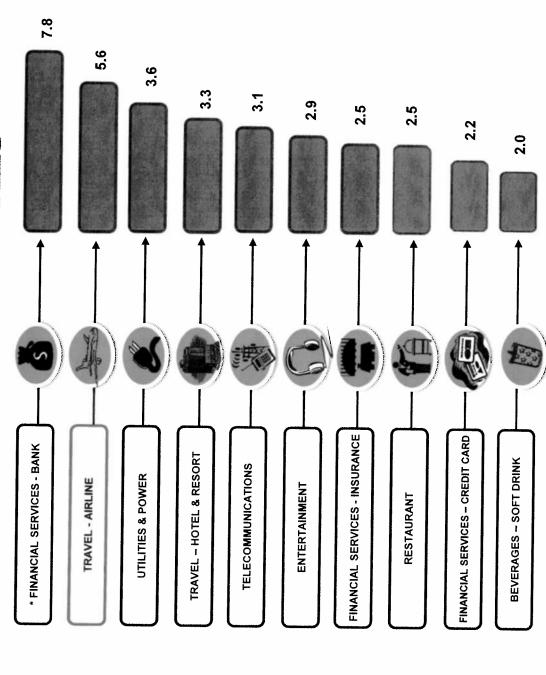


*Explanation of Index: Anheuser-Busch InBev is 13.0 times more likely to sponsor festivals and events than the average of all other companies in this data set.



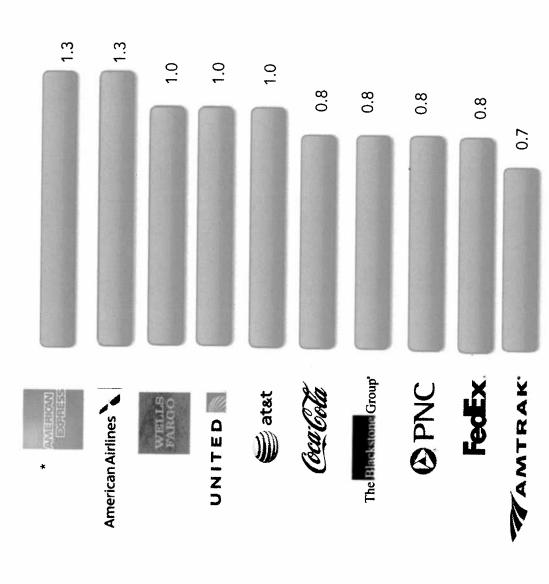
ű,

MOST ACTIVE CATEGORIES SPONSORING GOVERNMENT/CVB PROPERTIES



*Explanation of Index: Financial Services companies in the bank sector are 7.8 times more likely to sponsor Government/CVB categories than the average of all other sponsor categories in this data set.

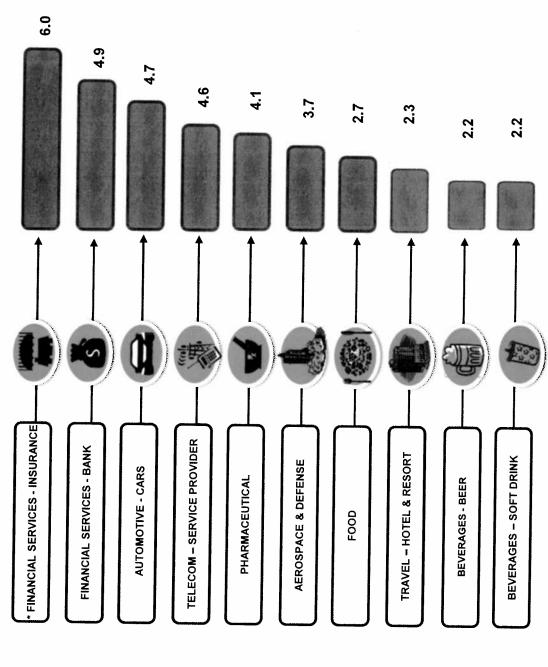
TOP CORPORATE OWNERS SPONSORING GOVERNMENT/CVB



*Explanation of Index: American Express Co. and AMR Corp. are 1.3 times more likely to be sponsors of Government/CVB than the average of all other companies in this data set.



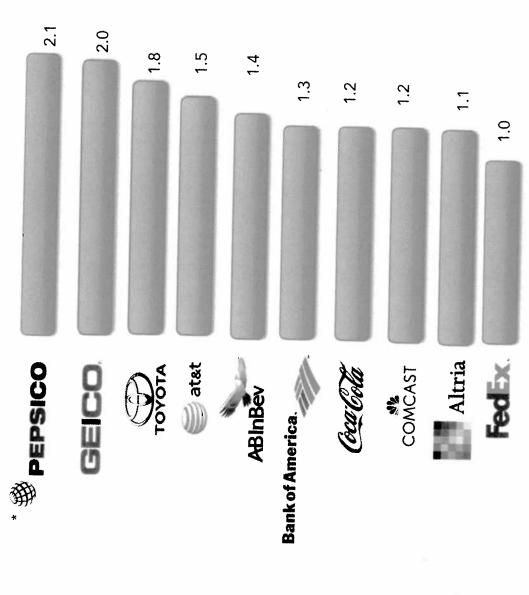
MOST ACTIVE CATEGORIES SPONSORING WASHINGTON, DC DMA



*Explanation of Index: Insurance companies are 6.0 times more likely to sponsor properties in the Washington, D.C. DMA than the average of all other sponsor categories in this data set.



TOP CORPORATE SPONSORS IN THE WASHINGTON, D.C. DMA



*Explanation of Index: PepsiCo, Inc. is 2.1 times more likely to sponsor properties in the Washington, D.C. DMA than the average of all other companies in this data set.

