Partnership Procedure

Parent Policy: Operations and Finance Committee Terms of Reference
Related Policies: --
Approving Body: General Manager or Designate
Passed: January 19, 2010
Amended: September 26, 2022

1 Purpose

(1) The purpose of this Procedure is to:

(a) establish procedures by which the SU enters Partnerships with external entities;

(b) establish criteria for proposals to create a new Partnership; and

(c) provide guidelines for the administration of Partnerships by the SU.

2 Scope

(1) This Procedure applies to:

(a) the SU; and

(b) external entities with whom the SU partners, such as:

(i) University of Calgary departments or units;

(ii) charitable, non-profit, and community organizations;

(iii) businesses; and

(iv) government agencies.

3 Definitions

(1) In this Procedure:

(a) “Partnership” means a formal arrangement between the SU and an external entity in which the SU provides non-monetary gifts to the external entity;

(b) “Strategic Plan” is defined per the Union Bylaw as the SU’s three-year guidance document that includes the mission statement, vision statement and guiding principles;

(c) “SU” means the Students’ Union, the University of Calgary; and

(d) “Union Policy” is defined per the Union Bylaw as any official statement of values, beliefs, principles, or process of the SU as outlined in the Constitution, Union Bylaw, Procedures,
4 Partnerships

(1) Partnerships must:

(a) be exclusively non-monetary in nature;
(b) provide a benefit to the undergraduate student experience at the University of Calgary;
(c) align with the SU’s mandate under the Alberta Post-Secondary Learning Act;
(d) align with one or more of the values included in the Strategic Plan, which for the period of 2022-2025 are:
   (i) Community, “we foster belonging by connecting students to personal, professional, and social opportunities;”
   (ii) Excellence, “we deliver exemplary service though leadership and dedication to students;”
   (iii) Equity, “we celebrate diversity in all its intersecting forms and combat attitudes and systems that lead to inequity;”
   (iv) Ingenuity, “we innovate and adapt to the evolving needs of students in creative and dynamic ways;” and
   (v) Integrity, “we demonstrate honesty and responsibility in all our actions and decisions;” and
(e) address one or more of:
   (i) Quality of Education, by providing opportunities for undergraduate students that directly complement their academic experience, or important life skills, or both;
   (ii) Collaboration, by;
      (A) building bridges between students and departments, faculties, or the community, or
      (B) fostering university or community pride, or
   (iii) Wellness, by promoting the physical or mental wellbeing of the University of Calgary campus community, including mental health, inclusion, or accessibility;

(f) be reported on by the partner to the Operations and Finance Committee after the conclusion of the event or activity, to detail the outcomes and impact of the Partnership.

(2) Partnerships cannot:
(a) include the waiver of:
   (i) taxes;
   (ii) gratuities;
   (iii) labour fees;
   (iv) externally mandated costs, including from SOCAN or Re:Sound;
   (v) security costs;
   (vi) catering costs;
   (vii) costs not listed on the tentative contract between the SU and a partner; or
   (viii) costs associated with equipment not owned by the SU, including costs levied by University of Calgary Com/Media; or

(b) include the use of:
   (i) SU employee resources unrelated to the direct provision of space or SU resources; or
   (ii) SU space determined by the General Manager or designate to be inappropriate for the purposes of the Partnership; or

(c) violate, or intend to violate, Union Policy or University of Calgary policies or procedures;

(d) negatively impact or interfere with the SU’s administration of its own programs, services, businesses, events, or brand;

(e) be used in combination with other sources of SU funding, or

(f) generate, or be intended to generate, revenue for the partner.

5 Partnership Proposals

(1) An external entity may apply for a Partnership once per calendar year unless the Operations and Finance Committee exercises its discretion to allow additional applications within the same calendar year.

(2) A Partnership proposal must:
   (a) be submitted to the General Manager or designate at least 25 business days prior to the event or activity;
   (b) include a clear rationale of how the Partnership meets the criteria of this Procedure;
   (c) include information about the prospective partner;
(d) include a complete budget for the event or activity;
(e) include a list of all previous partnership requests that have been submitted by the prospective partner;
(f) include a tentative contract with MacEwan Conference and Events Centre;
(g) include a detailed list of space and resources requested from the SU; and
(h) include a statement of activities that will be undertaken to promote the event or activity, and to recognize the SU as a partner.

(3) Upon receipt of a valid Partnership proposal, the General Manager or designate must:
   (a) if the proposed Partnership complies with the provisions of section 4, bring the proposal forward to the next possible meeting of the Operations and Finance Committee for consideration; or
   (b) if the proposed Partnership does not comply with the provisions of section 4, deny the proposal.

(4) Per the Operations and Finance Committee Terms of Reference, as Partnerships are non-monetary, approval of a Partnership proposal requires a majority vote of the Operations and Finance Committee.

6 Sanctions

(1) Failure by the partner to complete a report to the Operations and Finance Committee of the outcomes and impact of the Partnership after the conclusion of the event or activity may lead to:
   (a) the rejection of any future Partnership proposals from or on behalf of the partner for a period of up to one year;
   (b) the SU issuing an invoice to the partner for the space, resources, or both, allocated through the Partnership, in part or in whole.

7 Administration

(1) The General Manager or designate must maintain a record of all Partnerships approved by the Operations and Finance Committee, including:
   (a) a description of the Partnership granted, per the original proposal;
   (b) a list of the dollar value of the gifts granted to the Partnership; and
   (c) the applicable Executive or General Manager account that sponsored the proposal.

(2) The Operations and Finance Committee, in consultation with the General Manager or designate, must review all spaces and resources allocated and budgeted for Partnerships.
(3) The chair of the Operations and Finance Committee must report:

(a) the approval of any Partnership to SLC at the next possible SLC meeting; and

(b) a summary of all expenditures and decisions related to this Procedure to SLC, annually.

8 Review

(1) The General Manager or designate is responsible for reviewing this Procedure at least once every three years.

History:

- January 19, 2010 (Cabinet 67.56): Approved and enacted.
- July 26, 2012 (Operations and Finance Committee 70.09): Amended.
- October 9, 2014 (Operations and Finance Committee 72.18): Amended.
- September 27, 2016 (Operations and Finance Committee 74.16): Amended.
- June 19, 2018 (Operations and Finance Committee 76.06): Amended.
- September 26, 2022 (General Manager or Designate): Amended.