


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,

Resolutions, or Terms of Reference which are amendable in the proper form dictated by either the Constitution or the Union Bylaw.

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 through 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.