Competency Standard

UNIT TITLE: DEVELOP, IMPLEMENT AND EVALUATE SPONSORSHIP PLANS	NOMINAL HOURS: 60

| UNIT NUMBER: D2.TCS.CL5.12 | |

| UNIT DESCRIPTOR: This unit deals with skills and knowledge required to develop, implement and evaluate sponsorship activities undertaken by an operator in support of meetings, events and functions conducted by business partners or other industry organisations. | |

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE
Element 1: Identify the context for sponsorship activities **1.1** Identify and assess *opportunities for engagement with sponsorship activities* **1.2** *Develop a budget* for sponsorship activities **1.3** Determine the *criteria for participating in sponsorship activities* **1.4** Consider *alternatives to participation in sponsorship* **1.5** *Seek support from suppliers and service providers* for sponsorship activities **1.6** Establish *protocols for monitoring participation* in sponsorship activities **1.7** Set *criteria against which to evaluate effectiveness* of, and return from, sponsorship activities	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to the management of sponsorship activities that the host enterprise elects to participate in within the labour divisions of the hotel and travel industries and may include: 1. Travel Agencies 2. Tour Operation *Opportunities for engagement with sponsorship activities* may be related to: • Existing arrangements with business partners • Identifying new business and partners, including identification of strategic alliances and potential joint venture activities • Evaluating new entrants into the marketplace in terms of mutually beneficial undertakings and their ability to provide access to new markets • Supporting and strengthening relationships with past clients • Responding to direct requests for sponsorship support for activities

1.8 *Identify products and services that may be developed to align with sponsorship activities*

1.9 *Determine how requests for sponsorship that cannot be accommodated will be refused*

Element 2: Develop sponsorship packages

2.1 Identify the *elements of a sponsorship package* that the organisation is prepared to support

2.2 Identify the *products and services that may be offered* as sponsorship

2.3 *Define organisational expectations* in relation to expected returns for different sponsorship packages

2.4 Identify the *input required by the organisation into sponsorship arrangements*

2.5 *Develop and disseminate sponsorship information* to potential partners

Element 3: Implement sponsorship packages

3.1 *Confirm the details of the sponsorship* the organisation is prepared to offer

3.2 *Confirm the return the organisation will receive* for its sponsorship

3.3 Negotiate additional opportunities as a result of the initial sponsorship

- Assessing the potential return and exposure accompanying possible engagement with individual sponsorship opportunities
- Ensuring opportunities for engagement align with company policies, image, values and mission as publicly stated
- Assuring alignment of engagement with sponsorship with the business and strategic plans of the organisation
- Reviewing previous instances of engagement with sponsorship activities, including referring to evaluations that were conducted on those involvements.

Develop a budget will include:

- Setting financial parameters for engagement with sponsorship activities
- Determining non-financial support that may be made available to partners, including use of enterprise staff, use of facilities, information and knowledge sharing, joint advertising and promotion, provision of free and/or discounted products and services
- Scheduling engagement with sponsorship opportunities to align with relevant cash flow restrictions
- Establishing internal budgets and resource allocation protocols
- Notifying internal personnel regarding limitations placed on sponsorships.

Criteria for participating in sponsorship activities may be related to:

- Timing and duration of the activity
- Nature of the activity, including consideration of existing targeting of clients to achieve stated business goals, the image of the event as it aligns with company image, and appraisal of celebrities and similar who may be involved in the activity
- Potential for marketplace exposure and promotion of the business
- Potential to generate additional sales or clients
- Potential disadvantages associated with not participating in a sponsorship opportunity
- Activities being undertaken by the competition in terms of their participation in the activity

3.4 *Complete contracts* in relation to the sponsorship	• Whether the activity is one-off or in nature, including analysis of the duration of the required commitment to the activity
3.5 *Brief staff* in relation to the sponsorship deal that has been entered into	• Determination of the personnel responsible for making sponsorship-related decisions
3.6 Participate actively and willingly in the sponsored event/activity	• Specific objectives as determined by the organisation that arise from time-to-time.
3.7 *Ensure the terms and conditions of the sponsorship agreement are discharged*	*Alternatives to participation in sponsorship* may include:
	• Increasing or varying existing promotion strategies
3.8 *Monitor the application of sponsorship contributions*, as previously established	• Enhancing public relations
3.9 *Record results and outcomes* of participation in the sponsorship, as previously determined	• Increasing or varying existing advertising, including consideration of different mediums, frequency and placement
	• Lowering selling prices.
Element 4: Evaluate involvement in the sponsorship	*Seek support from suppliers and service providers* may include:
4.1 *Assess the outcomes and results* of the sponsorship against predetermined KPIs	• Asking for assistance with sponsorship from business partners
4.2 Seek *feedback on the sponsorship event or activity*	• Asking from assistance with sponsorship from clients
	• Asking for assistance from peak industry bodies and government agencies.
4.3 *Provide feedback to the organiser* of the sponsorship event or activity	*Protocols for monitoring participation* should relate to:
	• Identifying staff and/or external agencies to track the use of resources supplied
4.4 Determine whether similar sponsorship involvement will occur	• Establishing internal records to record the results of involvement in individual sponsorship activities
4.5 Archive lessons learned from the sponsorship engagement for future reference	• Preparing internal forms and systems to facilitate tracking the type and volume of resources committed to, and provided for, sponsorship activities
	• Undertaking scheduled visits to sites and events where sponsorship has been provided
	• Archiving evidence of the exposure and mention that the organisation receives as a result of its engagement with every sponsorship activity.

	Criteria against which to evaluate effectiveness may include:

- Extent to which actual exposure matches promised/agreed exposure

- Classification and quantification of exposure by column inches, minutes and other criteria by various media outlets

- Key Performance Indicators (KPIs) which may include:

  - Number of new clients sourced and entered on databases, including initial quantification of existing statistics prior to engagement with the sponsorship activity

  - Sales, including advanced bookings received, and analysis of sales statistics by identified category

  - Other specific and quantified targets deemed relevant to the organisation at the time

  - Enquiries made to the business as a result of the sponsorship exposure, including establishment of dedicated contact numbers for sponsorship-related enquiries or purchases

- Change in perception about the business, including image, market position and its products and services following the sponsorship activity.

Identify products and services that may be developed to align with sponsorship activities may include:

- Modifying existing products and services, including changes to destinations, inclusions, promotions, timing, duration, accommodation type and style, and travel options

- Introducing new products, services or packages to align with the event

- Developing one-off products and services only available to coincide with the sponsorship event or activity

- Re-titling of packages to reflect the sponsorship activity

- Partnering other businesses in creating a joint venture product

- Providing a discount for purchasers participating in, or aligning with, the sponsored event or activity. |

	Determine how requests for sponsorship that cannot be accommodated will be refused may include: • Preparing standard 'thanks and regret' letters identifying the other activities that the organisation engages in • Explaining how the application for sponsorship does not meet the identified criteria of the business • Working with applicants to re-formulate their application or activity in order for it to qualify for sponsorship • Appointing and training personnel to deal with such instances • Identifying a supplementary contribution that may be offered where other more substantial sponsorship cannot be made, including organisational merchandise, and nominated discounts • Ensuring the negative response of the organisation leaves a positive result in the eyes of the individual or organisation making the request. *Elements of a sponsorship package* may include: • Overall event sponsorship • Naming rights • Nominated activities within the overall sponsorship event, including meals, accommodation, travel, entertainment, guest speakers, social events, promotion and advertising • Contribution of unacknowledged support • Provision of 'in principle' support only • Introductions to other individuals and/or businesses who may provide sponsorship.

	Products and services that may be offered may include:
	• Financial assistance, including cash contributions, discounts, and rebates
	• Merchandising items such as bags, caps, pens, t-shirts featuring company name and/or logo
	• Advertising material, including posters, banners and various point-of-sale materials
	• Tours, trips, packages and other products or services from the offerings available, including provision of products and services that have been obtained from suppliers and service providers who support the business, such as meals, accommodation, travel, entry to attractions
	• Advice and information
	• Personnel to assist with the planning and/or conduct of the sponsored event.
	Define organisational expectations should be related to the development of a range of different sponsorship packages at different price points and may include:
	• Nominating the types of packages available, such as Gold, Silver or Bronze
	• Prescribing the total value of each package
	• Nominating the products and services that are included in each package
	• Describing and quantifying organisational expectations in relation to the provision of each package, in relation to sales, contacts made, general public exposure, media exposure, naming rights, product placement, size, type and placement of host enterprise promotional material, and absence of industry competitors, or requirements regarding proximity of competitors to host enterprise materials
	• Explaining to organisers exactly what the sponsorship covers and exactly what it is expected to achieve for the business
	• Identifying the provision of complementary invitations to the event or activity, including seats, meals and tickets for use by the host enterprise and seats for distribution to other clients.

	Input required by the organisation into sponsorship arrangements may include: • Zero input • Participation in planning and implementation to varying degrees ranging from an advisory capacity through to a seat on the committee and involvement in the decision making processes • Decisions relating to the placement of host enterprise promotional material and product • Decisions relating to the involvement of competitors with sponsorship of the same event or activity. *Develop and disseminate sponsorship information* may include: • Preparing hard copy information that explains to targeted individuals and organisations what sponsorship is available from the host enterprise • Forwarding sponsorship information kits to strategically targeted event and activity organisers • Explaining sponsorship availability and requirements in response to enquiries generated • Encouraging event organisers to apply for sponsorship. *Confirm the details of the sponsorship* may include: • Clarifying elements of existing sponsorship packages • Negotiating variations to standard sponsorship packages • Meeting with event organisers, boards and committees. *Confirm the return the organisation will receive* may include: • Obtaining verification that the expected outcomes for the host enterprise will be forthcoming • Quantifying and fully describing expectations of the host enterprise

	• Adjusting expectations in accordance with feedback and/or information received from the organiser, including increasing, decreasing or substituting expectations
	• Explaining the host enterprise objectives in relation to the sponsorship being considered
	• Advising organisers that the identified returns to the host enterprise are expected to form part of a legally binding agreement that will be entered into between the two parties.
	Complete contracts may include:
	• Drafting a contract for approval
	• Using a standard form contract
	• Gaining legal advice and approval
	• Reading and understanding all terms and conditions of the contract
	• Signing the contract
	• Making initial payment on signing of the contract, where applicable
	• Filing the contract.
	Brief staff may include:
	• Advising staff of personnel involved in the sponsorship arrangement
	• Explaining the possible impact of the sponsorship agreement on traditional workloads
	• Explaining revised or new policies and procedures to support the sponsorship
	• Encouraging commitment to the sponsorship
	• Highlighting benefits that may flow to staff from involvement in the sponsorship, such as attending events, and meeting celebrities.

	Ensure the terms and conditions of the sponsorship agreement are discharged may include: • Providing resources as identified in the contract, including products, services and other advice, assistance and information • Ensuring relevant quantities are provided • Ensuring supply dates are complied with. *Monitor the application of sponsorship contributions* may include: • Meeting with organisers to obtain event updates and progress reports • Visit events and sites to observe activity, advertising, product placement and similar • Monitor media to identify advertising for the event or activity • Maintaining knowledge regarding the contents, terms and conditions of the contract • Taking remedial action where practice or results are below stated expectations. *Record results and outcomes* may include: • Taking still and moving photographic images/records of the event and ancillary activities • Filing hard copy documentation relating to the sponsored event, including media articles, media advertising, periodic reports, feedback sheets, market research data • Recording statistical results in accordance with identified key performance indicators. *Assess the outcomes and results* may include: • Compiling data that has been captured • Quantifying statistical data • Comparing actual outcomes/results against projections, expectations and nominated key performance indicators • Seeking reasons behind the attainment or non-attainment of stated targets and objectives.

	Feedback on the sponsorship event or activity may include verbal and written feedback from: • Sponsorship partners • Participants in the sponsored event/activity • Members of the general public • Enterprise staff who attended and/or worked on the event • Industry peak bodies • Government agencies • Joint venture partners, such as suppliers/providers who provided assistance to the host enterprise sponsorship activities. *Provide feedback to the organiser* may include: • Providing hard and soft data regarding the effects of the sponsorship on the organisation • Meeting with those involved to discuss the general implementation of the event, including identification of special circumstances that impacted on the event, such as weather, operational problems, failure of a celebrity to attend and similar occurrences • Sharing information. **Assessment Guide** The following skills and knowledge must be assessed as part of this unit: • Enterprise policies and procedures in regard to dealing with external parties such as suppliers and clients, and the criteria for provision of sponsorship, including understanding its connection to the business and strategic directions of the business • Ability to use planning, negotiation, communication and liaison skills • Project management techniques • Knowledge of standard sponsorship packages available throughout the industry

	• Knowledge of procedures and protocols involved in the application for, and granting of, sponsorship
	• Knowledge of suppliers and service providers who may assist in the provision of sponsorship to other parties
	• Ability to observe, capture and record evidence relating to the application of sponsorship provision.
	Linkages To Other Units
	• Access and retrieve computer-based data
	• Communicate on the telephone
	• Develop and update local knowledge
	• Manage and resolve conflict situations
	• Work effectively with colleagues and customers
	• Develop a marketing strategy and coordinate sales activities
	• Establish and maintain a business relationship
	• Develop and implement a business plan
	• Prepare business documents
	• Develop and implement operational policies
	• Develop and update tourism industry knowledge
	• Create, implement and evaluate strategic product initiatives
	• Develop, manage and evaluate local marketing strategies
	• Develop and manage business strategies
	• Manage and control operational costs
	• Prepare and monitor budgets.

	Critical Aspects of Assessment
	
	Evidence of the following is essential:
	
	- Understanding of host enterprise policies and procedures in regard to dealing with external parties such as suppliers and clients, the criteria for, and provision of, sponsorship including understanding its connection to business and strategic directions of the business
	
	- Demonstrated ability to identify the context for sponsorship activities for a nominated real or simulated industry business, describing:
	
	    ▪ Opportunities to engage in sponsorship activities
	
	    ▪ A budget to support involvement in sponsorship and the basis on which that figure was calculated
	
	    ▪ Criteria to be used for deciding whether or not the business will engage in sponsorship
	
	    ▪ Support available from suppliers and providers to supplement the provision of sponsorship
	
	    ▪ Protocols to be applied when monitoring involvement in sponsorship
	
	    ▪ Criteria to be used when evaluating engagement/business involvement with sponsorship
	
	    ▪ The products and services that may be provided as sponsorship by the business
	
	- Demonstrated ability to develop and manage the implementation of three sample sponsorship packages that can be offered by a real or simulated business, which may be the same business that is used for the previous assessment, including definition and quantification of products and services available within each package, identification and quantification of returns to the business expected in each case, and presentation of the terms and conditions that will apply to these arrangements.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace and industry application of planning, development, communication, negotiation and management skills related to the allocation and implementation of sponsorship programs.

Resource Implications

Training and assessment must include the use of a real or simulated business offering sponsorship; and dealings with real or simulated businesses seeking and providing supplementary sponsorship to the primary sponsorship offered by the host enterprise.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Portfolio of documentation generated by the candidate, including research, plans, feedback, contracts and agreements
- Evaluation of the operational outcomes that eventuated as a result of provision of sponsorship
- Discussions with individuals involved in the sponsorship negotiation process
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit		
Level 1 = competence to undertake tasks effectively		
Level 2 = competence to manage tasks		
Level 3 = competence to use concepts for evaluating		
Key Competencies	**Level**	**Examples**
Collecting, organising and analysing information	3	Determining the strategic direction of the business and the objectives for engaging in the provision of sponsorship
Communicating ideas and information	2	Discussing organisational returns with organisations seeking sponsorship
Planning and organising activities	3	Determining sponsorship packages to be made available
Working with others and in teams	2	Obtaining input from other organisational staff to assist in creating sponsorship packages
Using mathematical ideas and techniques	1	Calculating budgets and returns required
Solving problems	2	Negotiating changes to standard sponsorship packages
Using technology	1	Using the internet to research and disseminate sponsorship information