

Clear Creek Education Foundation

6.21 Affinity Program Sponsorship Practice

I. Policy

It is the policy of the Clear Creek Education Foundation (Association) to offer affinity products and services to Clear Creek ISD constituents thus serving as a revenue source for teacher grants.

NOTE: Affinity products and services are defined as those programs extended to the Clear Creek ISD constituents that could provide a benefit to them either professionally or personally. No dollars are used in the development and maintenance of the Association's affinity programs; they are all self-supporting programs that are voluntarily purchased by the community.

II. Purpose

The objectives of the affinity products and services are to offer voluntary programs of economic benefit designed to serve the needs of the Association by providing high quality products at a value. Participation in Association's affinity products and services is voluntary.

Affinity products and services should generate revenue for Association's programs.

III. Practice/Procedure

A. PRODUCT/SERVICE SUPPLIERS

Association affinity products and service suppliers must meet the approval process described in the following criteria.

A product or service:

- Should have a broad-based appeal to the Association's community constituents.
- Should contribute to the Association's ability to attract and/or retain partners.
- Should fulfill the personal and/or professional needs of the community.
- Must be a product of high quality, service, and value, at a competitive price.
- Must have a sound historical performance, or, in the case of new products, the supplier must be able to demonstrate capacity to perform via financial resources and management skills, and provide documented projections for performance.
- Must agree to work with the Association in the development and marketing of the program to community as appropriate.
- Must execute promotion of the program as agreed upon.
- Must be an Association partner at the \$1,000 sponsorship level or above.
- All suppliers who were part of the affinity program prior to the adoption date of this policy are considered grandfathered, and the prior agreement with those suppliers will remain in effect.

Service Criteria

Affinity Product Providers (APP)

- Must agree to make all programs available to all eligible community constituents regardless of age, sex, sexual orientation, race, national origin, color, religion, or marital status.
- Must provide an account manager to work with on a day-to-day basis with the Association.
- Must provide evidence of capacity to service the Association's constituents.
- Must agree to resolve all complaints to both the constituent's and the Association's satisfaction in the event the service is below the established standards.
- And/or the marketer/broker providing the product or service must agree that the names, addresses, email addresses and phone numbers of Association constituents will not be sold, rented, exchanged, used, or offered in any manner by the company for any purpose outside the Agreement with the Association. Further, the company agrees that this provision shall survive the termination of the Agreement; and the company, upon termination of the Agreement, shall terminate all use of any constituent lists provided by the Association.

Financial Criteria

Affinity Products Providers (APP)

- Will provide necessary documentation of financial resources which will substantiate financial viability, and which can be verified; documentation must substantiate the fiscal condition of the company (and/or marketer/broker), including evidence of a successful business track record spanning several years, and evidence of current fiscal health.
- Must provide assurance of the safety of Association customer's monies.

B. SPONSORSHIP PROCEDURES

Prior to recommendation for sponsorship or any affinity products or services, assurances must be made that all of the elements of sponsorship criteria, service criteria, and financial criteria, as outlined above, have been met. In order to provide such assurances, at the least, the following steps should be taken.

- Secure a written proposal for the product or service, detailing its features, the pricing, its availability to Association constituents.
- Secure a written proposal for projected compensation to Association based upon sponsorship of the product and/or service.
- Meet with the supplier's representative(s) to discuss the proposed program, seeking answers to questions that the written proposal may not have addressed.
- Secure documentation that provides evidence of the fiscal soundness and history of the proposed supplier.
- Conduct independent research to determine the fiscal soundness of the prospective supplier and the proposed product or service.

- Secure references of other associations that have sponsored the program, including information about the length of sponsorship and number of participants in the program.
- Conduct a reference check.
- Secure a written proposal plan to market the program to Association's constituents, including projected response rates, and projected program participation.
- Understand the marketplace for the product/service being proposed, and compare the program to other similar programs currently available in the marketplace.
- Determine the segment of Association constituents who are eligible to participate in the program.
- Visit the supplier and determine whether the facilities and personnel you see mesh with the proposal that has been made.
- Provide Association management with an analysis of the potential risks associated with sponsorship of the product/service.
- Provide Association management with a written recommendation for sponsorship making reference to all of the above points and indicating how the product/service fared, how the prospective supplier fared, and what the projected benefits are.
- Provide Association management with a draft Contract or Agreement for preliminary review by Association counsel.
- The Clear Creek Education Foundation Board of Directors has the right of final approval and may approve or not approve at their discretion.