

# Wokingham Borough Council – Sponsorship Policy and Procedure

**'A great place to live, learn, work and grow and a great place to do business.'**

## **INTRODUCTION**

Sponsorship is much more than advertising, although there will be an element of branding as part of any sponsorship package. Sponsorship is about building a long-term partnership, promoting the values of the respective organisations, and about brand development. Sponsorship provides important funding to support the costs of services, projects and assets owned or managed by the Council, but it can also provide access to valuable expertise and in-kind support in areas where the Council may not have the skills or resources itself.

Wokingham Borough Council has had some success in achieving sponsorship over the years albeit in relatively modest amounts, most notably roundabout sponsorship, but it remains piecemeal and uncoordinated across the organisation.

### **Purpose**

This policy seeks to clarify the process of seeking sponsorship and create a mind-set in the organisation to be more proactive and receptive to sponsorship opportunities, to plan more effectively and to benefit more fully from existing and future corporate relationships.

This policy applies to Wokingham Borough Council. References to “the Council” throughout this policy means Wokingham Borough Council.

This policy outlines principles that must be followed when the Council is contemplating entering into an arrangement for its services, facilities or activities to be sponsored.

### **Scope**

This policy applies when the Council is the recipient of sponsorship as opposed to when the Council is providing sponsorship to a third party.

### **Objectives**

To ensure that:

- The Council optimises all suitable opportunities to engage with appropriate external organisations to secure commercial sponsorship for its assets, events, and programmes
- The Council’s reputation is adequately protected in sponsorship agreements it enters into
- Constructive collaboration and best value for the Council and sponsor is achieved through all sponsorship negotiations
- A consistent approach to sponsorship is implemented across the Council
- Sponsorship is recorded, monitored and audited across all the Council’s services
- The Council is protected from claims of inappropriate dealings or relationships with sponsors.

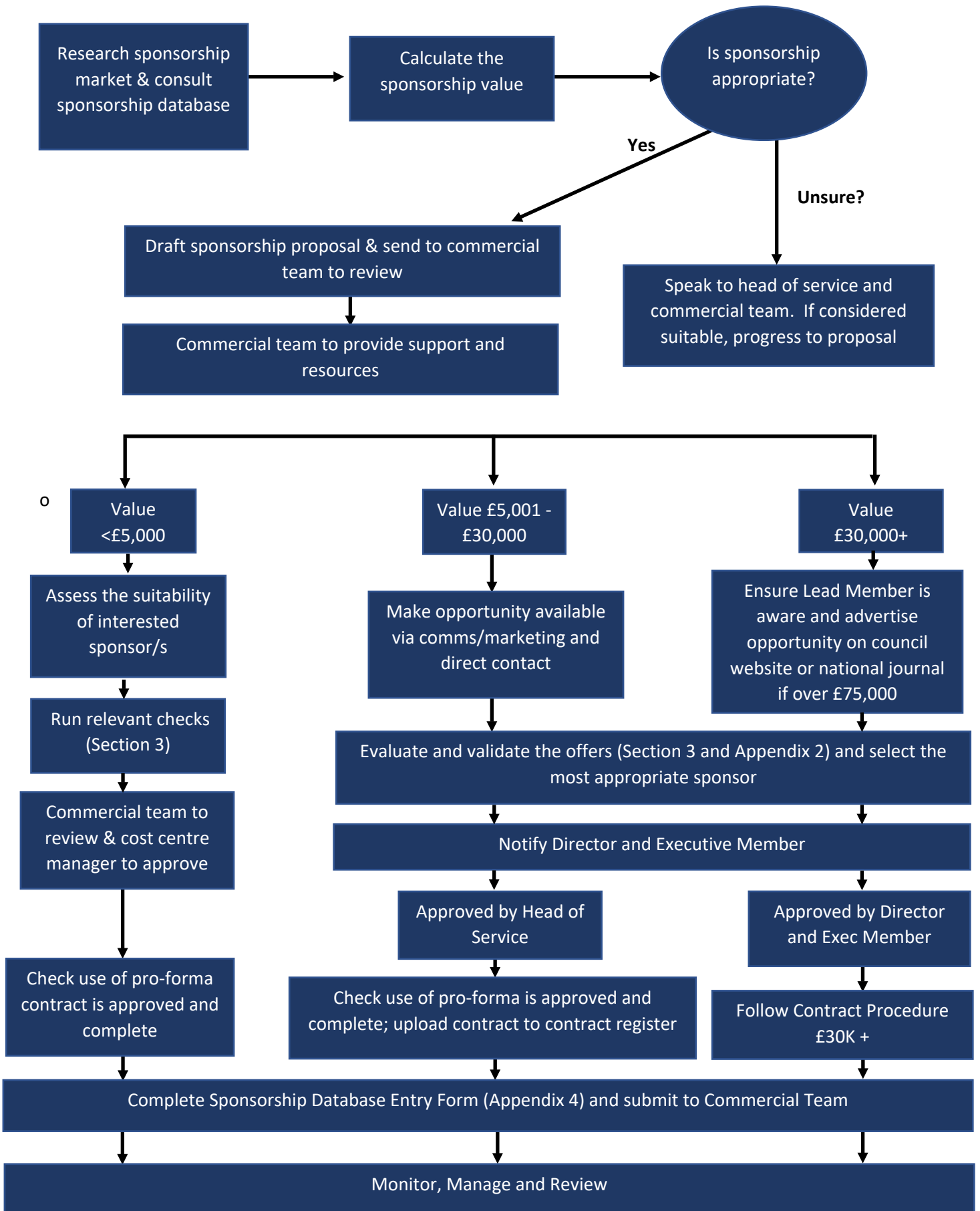
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## SPONSORSHIP PROCESS



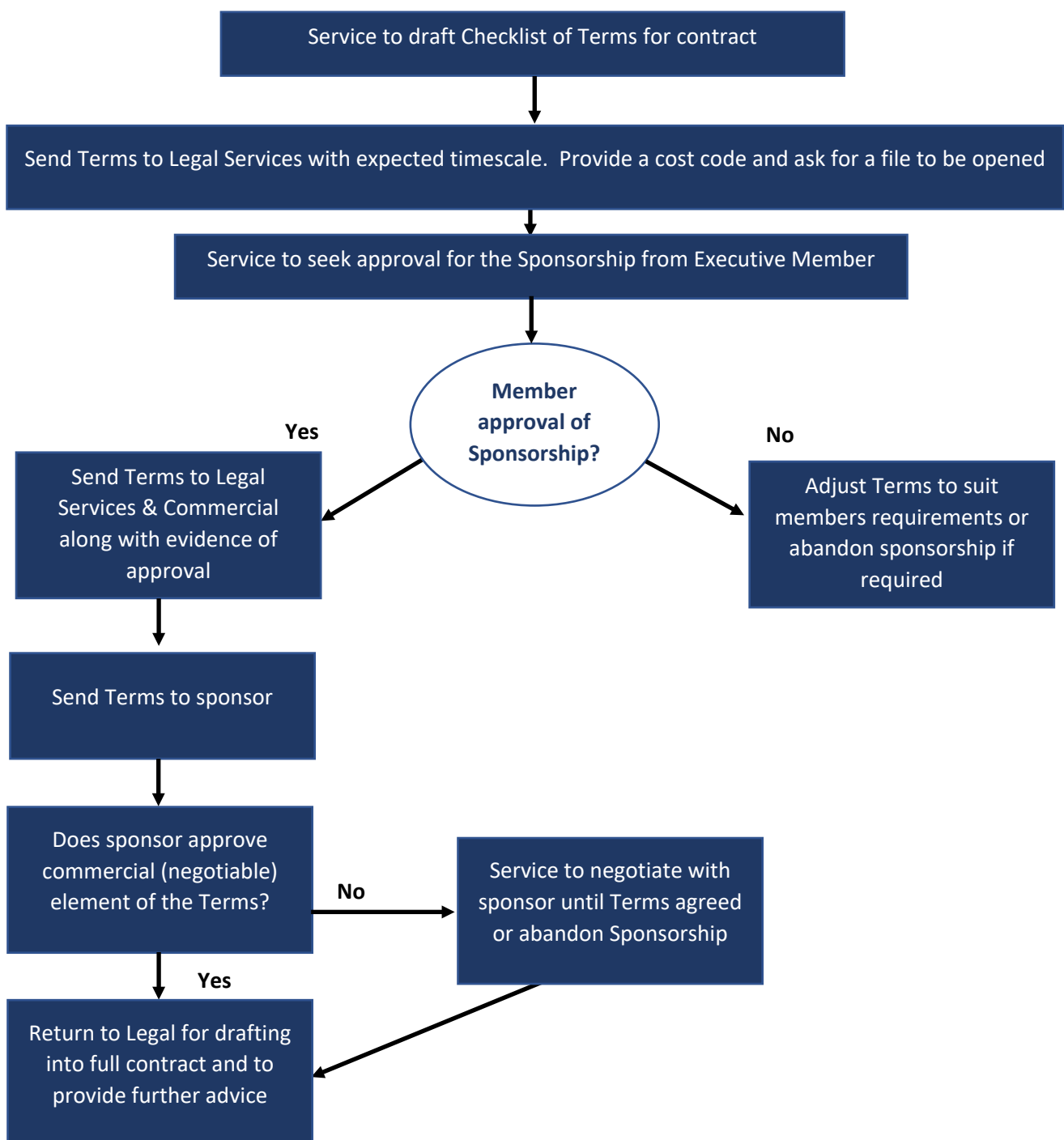
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### CONTRACT PROCEDURE - £30,000+

Sponsorships below £30,000 can be self-managed through use of the appropriate pro-forma. Services must check with their AD that they are authorised to do so.

Sponsorships with an aggregate value of £30,000 or above must be checked by Legal Services, who will decide on the correct form of documentation – use of the pro-forma or a bespoke contract. The proposed sponsor must have agreed to the principles of the sponsorship and key terms before this process begins.

The Commercial team can support through this process.



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## **SPONSORSHIP POLICY**

### **Principles**

The principles that must be adhered to are:

Principle 1: The Council may only enter into sponsorship arrangements when it is appropriate and in its best interest to do so.

Principle 2: Sponsorship agreements may only be entered into when it is lawful to do so and does not breach other Council objectives or policies.

Principle 3: Sponsorship opportunities must support or further the Council's objectives and priorities.

Principle 4: Sponsorship must represent value for money and any benefits conferred on the sponsor must be proportionate to the value of the sponsorship.

### **Principle 1: the Council may only enter into sponsorship arrangements when it is appropriate and in its best interest to do so**

The Council should only accept sponsorship where it is appropriate to do so and so long as its ability to exercise its statutory functions impartially and with integrity will not be compromised by the arrangement.

This rule is particularly relevant to:

- (a) the types of services, facilities and activities that may be considered as appropriate for sponsorship; and
- (b) the types of sponsors that the Council may align itself with in the delivery of a service, facility or activity.

### **Principle 2: Sponsorship agreements may only be entered into when it is lawful to do so and does not breach other Council objectives or policies**

The Council must act in accordance with statutory requirements, within the parameters of the law and in accordance with its objectives and policies

In most circumstances, the Council will only be able to enter into a sponsorship agreement if the agreement facilitates or is conducive, incidental, necessary or expedient to the exercise of an express power such that an ancillary power can be relied on

### **Principle 3: Sponsorship opportunities must support or further the Council's objectives and priorities**

The Council must assess a sponsorship proposal considering the purpose for which the particular service, facility or activity to be sponsored is used or is being developed or the particular activity to be sponsored is being undertaken.

Indicators that will demonstrate that a sponsorship proposal will further the Council's objectives or priorities include:

- sponsorship will enable the Council to expand the scope or influence of a project so that it is more effective, in other words, the Council will be able to better discharge its functions;
- sponsorship will allow the Council to communicate with difficult to reach or different audiences;
- sponsorship will foster innovation and allow the Council to exercise its functions in a way that might not otherwise have been conceived of or possible if the Council did not have the benefit of the sponsor's knowledge and expertise or funding;
- sponsorship will support the Council engagement with key stakeholders.

Private: Information that contains a small amount of sensitive data which is essential to communicate with an individual but doesn't require to be sent via secure methods.

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The Council will ensure that any sponsorship arrangement with a Sponsor will not contain any material constraints on the Council's objectives and priorities and will not compromise its activities.

The Council will also ensure that the sponsorship agreement complies with relevant legislation including the Equality Act 2010.

### **Principle 4: Sponsorship must represent value for money and any benefits conferred on the sponsor must be proportionate to the value of the sponsorship**

The value of the sponsorship opportunity must be assessed and offers to sponsor only accepted if they are commensurate with this value.

### **Appropriate Sponsors**

The Council welcomes all opportunities to work in partnership with organisations which are aligned with the Council's strategic priorities and core values.

The Council will not enter into sponsorship arrangements that may, or may be perceived to, have a detrimental impact on the Council's ability to discharge its functions impartially or may put the Council's reputation at risk.

The Council will not put itself in a position where it might be said that such a sponsorship has, or might, or may be thought to have:

- Influenced the Council in carrying out its statutory functions in order to gain favourable terms from the Council in any business or other agreement
- Personally benefitted individual Council employees or Councillors, their friends or family;
- Aligned the Council with any organisation that conducts itself in a manner which conflicts with or undermines the Council's values, strategic priorities, aims and objectives
- Aligned the Council with any organisation that promotes messages relating to public controversy and sensitivity, and/or is a controversial organisation that is likely to cause widespread or serious offence to members of the public on account of its services, products or values
- Limited the Council's ability to carry out its functions fully and impartially

Additionally, Services should not consider association with any sponsor who:

- Discriminates against people based on including but not limited to gender or gender reassignment, race, ethnicity, disability, nationality, sexual orientation, age, or religion/belief
- Promotes religious activities unless the sponsorship is in connection with a religious community event supported by the council
- Promotes gambling or other activities that are not aligned to the Council's values
- Has not passed validation checks
- Is in financial or legal conflict with the Council
- This list is not exhaustive and may be updated from time to time as appropriate

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## **APPLYING THE POLICY**

### **1. Finance Regulations**

Sponsorships must be entered into in accordance with the Financial Regulations in the Constitution. Officers must ensure that their Finance Business Partner is aware of sponsorship discussions from the outset and that finance regulations are adhered to. [Constitution - Wokingham Borough Council \(modern.gov.co.uk\)](http://modern.gov.co.uk)

Sponsorship arrangements are subject to VAT. At all times follow the latest advice from HMRC. The latest information or queries can be checked via [VATQueries@wokingham.gov.uk](mailto:VATQueries@wokingham.gov.uk).

### **2. Corporate Ownership**

The Commercial Team own this policy and essential register of sponsorship, although it will be the responsibility of each service to maintain the data held on file.

The commercial team will be on hand to advise and support sponsorship proposals as well as providing the necessary framework and controls. The process will vary according to the level of sponsorship on offer (reference the process map for more information), but broadly the responsibilities are set out in the table below, all of which will be supported by commercial as required.

<b>Critical Steps</b>	<b>Responsibility</b>
Marketing / promotion of sponsorship opportunity	Commercial and services in conjunction with CEM (Communication, Engagement and Marketing)
Enquiry/lead validation checks	Service
Draft proposal	Service
Initial review and valuation check	Commercial
Seek authorisation	Service
Submit proposal to sponsor	Service
Contracts	Commercial supported by legal
Invoicing	Service
Activation and account management	Service
PR	CEM / service
Update sponsorship register	Commercial
Monitor and ongoing review	Commercial and Service

Process map outlining ownership can be found at [sponsorship process V2.pdf](#)

### **3. Seeking or Accepting Sponsorship (Validation)**

Council officers looking for suitable sponsorship for an activity must:

- Identify appropriate market sectors and organisations within those sectors
- Refer to the sponsorship database
- Assess the suitability of potential sponsors (refer to Principle 1 and 4 – Appropriate Sponsors)
- Be able to demonstrate using a clear evaluation that any sponsorship package provides best value to the Council
- Write a full proposal and calculate the net worth of the sponsorship to both council and sponsor, by comparing the costs to the Council with the total sponsorship value (see Appendix 1 – Calculating Sponsorship Worth)
- Seek appropriate advice and authorisation commensurate with the value of the sponsorship

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In identifying a sponsor, the Council will generally seek to consider the appropriate balance of the commercial offer, the strategic fit of the sponsor and their plans for activation of the rights on offer.

It is essential that a potential sponsor is sufficiently vetted including information about its associated businesses, other activities or interests and financial position so that a complete picture can be established and a proper assessment of the sponsor is carried out prior to any arrangement being formalised. These checks should continue during the currency of the sponsorship agreement.

Support will be provided by the Commercial Team to assist officers and members to assess the suitability of a sponsor.

Due diligence should be carried out for all potential sponsors, to include:

- Is the company legitimate? Has there been any negative PR or consistently poor reviews? Do we work with them elsewhere in the organisation and what is that experience? (desk research)
- Are they financially sound? Companies House and credit check (Business Services)
- No legal conflict with the Council (Legal Services)
- Compliance with finance regulations and to ensure there is no money outstanding to the council (Finance Business Partner/Accounts Receivable)
- Is their Equality, Diversity, and Inclusion policy and reputation in line with WBC policy? (review Sponsor's policy, if in doubt refer to Insight, Strategy and Inclusion team)
- Any other relevant information pertaining to the sponsor's suitability (Officers/Commercial/Business Services)

#### 4. Sponsorship Value

The total value of any sponsorship opportunity to the Council and the sponsor must be fully calculated, checked with the commercial team and appropriately recorded in writing.

The total monetary value of a sponsorship contract is the total monetary value of the contract and/or equivalent sponsorship-in-kind value over the whole term of the contract. Added value goods or services should be calculated by the Service and checked by the Commercial team.

A sponsorship contract with a total ascertainable monetary value exceeding £5,000 must be recorded in the Council's Contracts Register.

In all cases, where a sponsorship deal is valued at more than £5,000 officers must be able to demonstrate that other potential sponsors have been approached or that the deal arranged represents the best value the Council is able to obtain where others have not been forthcoming.

For sponsorship deals valued over £30,000 the opportunity must be advertised on the Council's website.

Sponsorship opportunities over £75,000 must be advertised in a national journal or other appropriate location.

Agreements below this value will still need to demonstrate that they have been properly negotiated, for instance, by keeping file notes of meetings or discussions.



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### 5. Authorisation to Agree Sponsorship Deals

Sponsorships valued at £5,000 or under can be agreed by the relevant cost centre manager unless there are any special circumstances which make a second authorisation desirable e.g., if the issue might be politically sensitive, or the sponsor has requested unusual conditions.

The sponsorship agreement for deals valued between £5,001 and £30,000 must be agreed and countersigned by the relevant section or Head of Service (or Director if the Head of Service has carried out the arrangements).

The relevant Executive Member and Assistant Director/Director should also be notified in advance and authorise all sponsorship deals valued above £30,000.

If an officer wishes to vary the procedure outlined in this policy, sponsorship deals valued between £5,000 and £30,000 should be agreed by relevant Head of Service and notified to the relevant Executive Member. Opportunities valued over £30,000 should be agreed by the relevant Director and approved by the Executive Member. Any request for a variation must be set out and agreed in writing.

### 6. Use of Sponsor's Logo/Branding

CEM must be consulted in advance of agreeing to any branding or publicity.

The publicity or on-site branding agreed with a sponsor should be proportionate to the value of the sponsorship. The Council's involvement in the event should not be obscured by credit to the sponsor. It is most unlikely that it will ever be appropriate to agree a deal with a sponsor where they have sole branding rights and the Council is not entitled to any publicity itself, or the Council's branding is unreasonably restricted. If such a deal is exceptionally agreed, it should be approved by the service Director and Executive Member. The limitations on the Council should also be noted on the sponsorship database.

The following wording, or alternative wording as advised by CEM, is to be used alongside sponsorship content or editorial. "Sponsorship is not a way for any company or organisation to be viewed favourably by the Council in any other business arrangements they might be a party to. The Council does not endorse or recommend any advertiser or sponsor. Any organisation wishing to sponsor a Council owned product or service must adhere to this policy and the Council's Terms and Conditions for Sponsors."

### 7. Documenting Sponsorships

All sponsorship deals should be documented between the Council and the sponsor as follows:

Sponsorships with a value under £30,000 are to be documented by a pro-forma contract supplied by Legal Services and available from the Commercial Team. The pro-forma will be reviewed by Legal Services annually or more frequently in the case of major legislation changes. The service AD will be able to advise on whether the use of a pro-forma is approved, if not, a waiver must be sought.

Sponsorships with a value over £30,000 must be checked with Legal Services using the Terms Checklist. Legal Services will make the decision on the best contract form, either using the pro-forma or as a bespoke agreement.

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Sponsorship arrangements can be complex, involving a combination of cash sponsorship, in kind benefits, and provision of services. Officers should be aware that although the value to the Council in cash may be relatively low, the combined value might well take the deal over the thresholds.

Additionally, whilst the value of the sponsorship arrangements to a particular service may be low, if another service also has an arrangement with that company, the combined value to the Council may cross a threshold. It is therefore particularly important that officers maintain accurately the central database, which will be owned by the commercial team who will be able to advise on duplication and take appropriate advice from legal, finance and procurement on whether this presents a risk.

Contracts should clearly document the invoicing structure for the sponsorship and payment terms and the responsible officer should ensure that invoicing is timed to allow for payments to be received in line with the terms of the contract.

### **8. Monitoring and Reviewing the Sponsorship**

For the duration of the sponsorship term, the service must ensure that the project progresses in accordance with the agreed project plan, and that all expenditure is properly incurred and recorded and all claims for funds are made by the due date.

It is recommended that the service meets or engages with the sponsor at regular intervals and maintains communication throughout the sponsorship period to develop good client relationships and ensure that all the benefits of the sponsorship are realised for both parties.

An internal assessment of the sponsorship after the event or at agreed review periods should be carried out and any relevant findings noted on the sponsorship database.

Retain all documentation on file for audit purposes for either six years or twelve years if the sponsorship agreement was signed as a Deed or for the term of the sponsorship agreement if longer.

### **9. Co-ordination**

A central database will be maintained, capturing all sponsorship deals concluded.

The commercialisation team will act as custodians of the database but individual officers who arrange sponsorship are responsible for the accuracy of their entries on the database. A note against out-of-date entries must be made but left on the database so that the audit trail is complete.

A standard form for database entries, for completion electronically, is available as Appendix 4. All sponsorships, whether in-kind or financial transactions, must be recorded here to avoid duplication and to ensure transparency.

Once a sponsorship deal is agreed, the relevant cost centre budget should be updated by contacting Business Services.

### **10. Marketing the Sponsorship Opportunity**

For larger scale projects or events, the marketing campaign should be planned well ahead to attract suitable sponsors and ensure a fair playing field as well as allowing the time necessary for approvals and legal agreements to be completed.

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Internal resource is in place to support business engagement - through the Commercial team and Economic Development. They can advise on the best course of action to reach appropriate audiences and avoid conflict.

Campaign content must be approved and managed through the Communication, Engagement and Marketing Service (CEM).

### 11. Contacts and Links

The commercial team must be made aware of sponsorship discussions from the outset and can provide support and advice on all aspects of a sponsorship agreement. [commercial@wokingham.gov.uk](mailto:commercial@wokingham.gov.uk)

All communication with the legal service is via: [SharedLegalSolutions@wokingham.gov.uk](mailto:SharedLegalSolutions@wokingham.gov.uk)

All publicity surrounding a sponsorship agreement must be signed off by CEM, who can also support in marketing the sponsorship opportunity [CEM@wokingham.gov.uk](mailto:CEM@wokingham.gov.uk)

Finance Regulations/Constitution: [Constitution - Wokingham Borough Council \(moderngov.co.uk\)](http://www.moderngov.co.uk)

Contracts Register: <https://procontract.due-north.com/ContractsRegister>

Companies House: [Get information about a company - GOV.UK \(www.gov.uk\)](http://www.gov.uk)

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## **APPENDICES**

### **Appendix 1 - Calculating Sponsorship Value**

It is essential to calculate the value of a sponsorship to ensure that the price asked for is fair and justifiable.

Sponsorship is a partnership between the Council and a sponsor. It requires sincere interest in the sponsor's objectives and how you can help them achieve goals. The more you listen to your sponsors, the better equipped you will be to create custom solutions and value them appropriately.

Some benefits are easy to calculate. For example, 40 complimentary tickets, which would normally sell for £10 are worth £400 to a sponsor (even though the tickets may cost the Council nothing if they are for an event which is unlikely to sell out). Other values to include are:

- Staff costs (Council staff time and ad-hoc support)
- Direct costs of delivering the event or programme, such as room hire, publicity, materials etc.
- Value of including the sponsor's logo on print or online marketing materials, based on the number of people likely to view - Digital Services or CEM may be able to provide this information

The monetary value of other benefits is more subjective and will depend on the sponsor, their reason for sponsorship, their level of need to access the audience/market, and therefore the value they place on benefits.

A few practical steps to valuing sponsorship are:

1. Create an inventory to include all tangible assets
2. Calculate the value of each asset
3. Determine and list the brand alignment value based on your understanding of the sponsor's objectives e.g., corporate social responsibility, increased brand awareness, synergy between the brand and the audience for the event/programme
4. List the alignment values to the Council outside of the financial value
5. Apply price adjusters – increase or decrease the value according to brand alignment and other values that cannot be financially assessed, such as:

 Alignment with for the sponsor's business objectives/target audience

  Market conditions

 Alignment with the Council's core objectives, strategy, or policy

The commercial team can provide support and advice in valuing sponsorship agreements.

If a sponsor negotiates and offers a lower sum than the package is worth, it is good practice to reduce the package proportionately but in tandem with the sponsor. Understand which assets are most valuable to them and re-assess the proposal taking into consideration the actual cost to the Council.

The final valuation exercise should be recorded & signed using the Sponsorship Database Entry Form.

Ensure that the sponsor understands exactly what is included in their sponsorship package before finalising, even fine details such as the size of logo that will be permitted on each platform.

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### Appendix 2 – Evaluating Sponsors

The financial value of the sponsorship must be set by the Council. See Appendix 1- Calculating Sponsorship Worth for more information on valuing sponsorships.

In all instances where an offer of sponsorship is made to the Council by more than one organisation, all potential sponsors should be evaluated through a fair and equal process that ensures that the chosen sponsor offers best value to the Council.

The officer managing the sponsorship should form an evaluation team, consisting of at least one other key member of staff relevant to the event. The team should use an agreed evaluation criteria to select a sponsorship offer and document this evaluation in the Sponsorship Database.

The overall financial value (including added value), corporate fit with the Council's objectives and the compatibility to the programme or event are the key criteria.

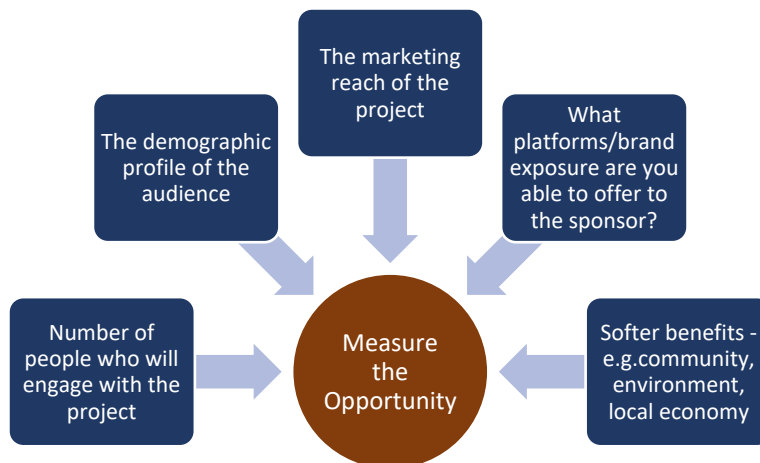
Other benefits by way of goods, services or knowledge share must be carefully evaluated to ensure they are useful and/or offer savings to the Council.

If the selected sponsor isn't the highest overall financial value to the Council, this must be justified and documented on the sponsorship database.

## Appendix 3 – Marketing the Sponsorship Opportunity

### Quantify the Offer

Understand exactly what the project can offer to a sponsor. This could be exposure to a large volume of people, or to a smaller targeted audience or simply an alignment with a theme that speaks to the values of their business. The offer should be about the benefits that will appeal to a sponsor, not the general benefits of the project to residents or WBC (Wokingham Borough Council).



### Identify the Target Market

Using the data that has been collated, identify the market sectors that are most likely to benefit from an association with the project. This will help to attract the right brands to align with the project.

Understanding the target market will make it easy to identify the best way to reach them. This may be through a blanket 'call to action' via social media or press release for example, or by direct contact with individual businesses.

### Plan the Campaign

CEM should be engaged from the outset and they can advise on the best course of action to reach appropriate audiences. If they cannot directly run a campaign, they will be on hand to check the copy and ensure it remains on brand and appropriate.

### Capture Data and Measure Results

Sponsorship can bring lasting relationships which can develop to provide mutual benefit and added value to residents. Post-event evaluation is essential to ensure the sponsor is kept informed and involved and to modify future sponsorship arrangements to maximise the benefits.

Case studies and soundbites from successful sponsorships can be used, with consent, to attract new sponsors.

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### Appendix 4 – Sponsorship Database Entry Form

Please complete and return to [commercial@wokingham.gov.uk](mailto:commercial@wokingham.gov.uk); [SharedLegalSolutions@Wokingham.gov.uk](mailto:SharedLegalSolutions@Wokingham.gov.uk) and Business Services [Business.Services@wokingham.gov.uk](mailto:Business.Services@wokingham.gov.uk)

A copy of all documentation and approvals should be included including a PDF/jpeg copy of the signed contract which will be sent to legal services.

<b>SPONSOR COMPANY DETAILS</b>	
Company Name	
Trading Name (if different)	
Nature of Business	
Registered Company Number	
Registered Company Address	

<b>SPONSOR'S CONTACT DETAILS</b>	
Contact Name	
Contact Number	
Contact Email Address	

<b>SPONSORSHIP INFORMATION</b>	
Activity Sponsored	
Date/s of Sponsorship	
Benefits to Sponsor	e.g., Logo on website
Costs of Delivering the Sponsorship	
Total Value of Sponsorship	
Benefits to Council	e.g., financial contribution £ Goods/services £
Total Value to Council	
Actual Value to Council	= Total value to Council less costs

<b>COUNCIL INFORMATION</b>	
Service	
Cost Centre	
Service Officer Name	
Head of Service Name	
Other Service Contacts/Comments	

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### Appendix 5 – Sponsorship Authorisation

Attach a copy of the draft sponsorship proposal and evidence of how sponsor suitability was assessed including all engagement where appropriate with:

- Legal
- Finance Business Partner
- Business Services
- Commercialisation
- Exec member
- Other parties as appropriate

If this sponsorship was selected over other sponsorship opportunities, please attach the evaluation documentation.

Cost Centre Manager £5,000 and under

Name: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: --/--/----

Comments: \_\_\_\_\_

Head of Service or Director/AD Between £1,001 - £30,000

Name: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: --/--/----

Comments: \_\_\_\_\_

Director/Executive Member - £30,000+

Name: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: --/--/----

Comments: \_\_\_\_\_

Name: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: --/--/----

Comments: \_\_\_\_\_