

## PETERBOROUGH PUBLIC HEALTH

Board of Health

### POLICY AND PROCEDURE

<b>Section:</b> Board of Health	<b>Number:</b> 2-190	<b>Title:</b> Sponsorship
<b>Approved by:</b> Board of Health		<b>Original Approved by Board of Health On (YYYY-MM-DD):</b> 1994-06-08
<b>Signature:</b> <i>Original signed by Board Chair</i>		<b>Author:</b>
<b>Date (YYYY-MM-DD):</b> 2021-01-13		
<b>Reference:</b> Board of Health Vision, Mission and Values 2-40 Canadian Public Health Association Corporate Relations/Corporate Sponsorship Policy (Approved December 9, 2008. Link: <a href="http://www.cpha.ca/en/legal/sponsorship.aspx">http://www.cpha.ca/en/legal/sponsorship.aspx</a> )		

**NOTE:** This is a **CONTROLLED** document for internal use only, any document appearing in a paper form should **ALWAYS** be checked against the online version prior to use.

#### Definitions:

##### Sponsorship

- A sponsorship arrangement is a business arrangement whereby the private sector partner commits resources (monies and/or in-kind resources) to support a specific project or activity, but does not share in the profits or underlying risks of the project. The private sector contributes funds to an event, program, or even a capital project and expects and receives a benefit (e.g. specific image and marketing opportunities) from the associated publicity.
- Sponsorship can occur when the two partners (e.g. Peterborough Public Health (PPH) and the private sector sponsor) share objectives and usually the private sector sponsor wants visibility. A sponsorship agreement covers a specific performance of work. The sponsor provides resources (e.g., money, staff, products, or services) and expects and receives a benefit (e.g. marketing or advertising opportunity).
- Sponsorship does not include paid advertising in PPH publications.
- Sponsorship funds are not tax receipted like donations.
- Gifts and donations are not classified as sponsorships.

##### Endorsement

A formal and explicit approval or a promotional statement for a product or service of a corporation.

##### High Profile Sponsorship

Any sponsorship that staff believe might damage or threaten the profile and credibility of the Board of Health.

## **Purpose**

This policy describes specific criteria and a review and oversight process for evaluating potential relationships with corporate entities. This policy is intended to protect the mission and integrity of Peterborough Public Health (PPH) while supporting fundraising efforts.

## **General Assumptions**

The general assumptions that will shape the acceptance of all sponsorships are:

- PPH will solicit and accept support only for projects and activities that are consistent with PPH's vision, mission and values;
- acceptance of sponsorships must enhance, and will not impede, PPH's ability to act in the best interest of the public at all times;
- PPH's name, logo, and other intangible intellectual assets must be protected at all times.

### **1. Initial Evaluation of Sponsorships**

The major determinants in evaluating sponsorships will be its value and from whom it is received. The proposed dollar amount will generally determine the level of review.

In addition, irrespective of the dollar amount of a sponsorship, high-profile sponsorships which involve organization-wide recognition or may be potentially contentious will require a review and recommendations by the Executive Committee and Board of Health review and approval.

For smaller sponsorship (or advertising) opportunities, staff may request an Executive Committee review should there be a question of whether the sponsor organization's values and principles are congruent with those of PPH.

It is expected that all sponsors, particularly those from the corporate sector, making sponsorships of any amount will comply with the PPH's Principles for Corporate Sponsorship (see Appendix A) and the criteria as stated in this policy.

#### **1.1 High-Profile Sponsorships**

All high profile sponsorships, regardless of the amount, must be reviewed by the Executive Committee for sponsor adherence to the policy and presented with recommendations to the Board of Health. The Board of Health must review and approve all decisions related to the recognition of potential PPH sponsors that involve high-profile recognition to ensure that these decisions preserve the credibility and reputation of PPH.

#### **1.2 Sponsorships valued at \$5,000 or more**

All sponsorships of \$5,000 or more will be reviewed by the Executive Committee for sponsor adherence to the criteria as stated in this policy. The Executive Committee through the Medical Officer of Health will report its recommendations periodically to the Board of Health.

The Board of Health will make final decisions about sponsor adherence to the policy on sponsorships of \$25,000 or more.

### 1.3 Sponsorships valued at less than \$5,000

All sponsorships under \$5,000 will be reviewed for sponsor adherence to the policy by management staff applying the criteria outlined in this document, including:

1. unrestricted sponsorships (i.e., sponsorships which are not tied to specific programs or activities);
2. Sponsorships made in support of established PPH programs or activities; and
3. Sponsorships made in support of new programs or activities.

## 2. Criteria for Reviewing a Sponsorship: The Four Questions

Overall, the purpose of the review is to determine the balance of the benefit to the public in relation to the risks and costs of collaborating with the sponsor. On a case-by-case basis, the following conditions should be considered in determining the benefits and risks of accepting a sponsorship.

### 2.1 **Are the specified proposed uses of the sponsorship congruent with the mission and priorities of PPH?**

Issues to consider in determining this congruence include:

1. How do the proposed uses of the sponsorship relate to PPH's mission and priorities?
2. Why does the organization want to sponsor PPH?
3. How will the benefits to be derived from the intended purpose of the sponsorship compare with the PPH's resources required to fulfill the intended purpose?
4. Do the practices of the corporation fit with the adopted public policies of PPH? Recognizing that socially responsible practices are a cornerstone of PPH's policies, and that good corporate citizenship should embody socially responsible practices, the following are among the types of issues that should be considered in assessing the benefits and the risks of accepting sponsorships from outside organizations, especially corporations:
  - The types of core products or services produced or provided;  
*Note: Sponsorships will not be accepted from tobacco companies, baby formula, alcohol companies, and manufacturers of firearms and weapons of mass destruction.*
  - Occupational health and safety conditions under which products or services are produced;
  - Employment practices, including commitment to diversity and a living wage;
  - Commitment to protection of the environment;
  - Record of regulatory compliance;
  - Marketing and advertising practices;

- Research and development policy and practices;
- Human rights record;
- Sponsor's relevant public policy positions;
- Record of support to public health organizations or public health-related issues and organizations;
- Other past activities will be weighed in relation to CPHA's public policies and public reputation.

It is recommended that a discreet initial assessment by staff be done as a prospect is identified or is self-identified as in the case of unsolicited requests to partner with the PPH. The assessment will be based on available current knowledge, including web sites, a review of newspapers and contact with appropriate public health leaders. PPH members contacted will be held to a level of confidentiality as it relates to discussing PPH's pursuit of potential sponsors until the information is made public.

If appropriate, PPH staff will utilize the services of *EthicScan Canada Limited*, a Toronto-based business ethics consultancy, corporate responsibility research house and educational resource centre, the mission of which is to help organizations and individuals behave more ethically. *EthicScan* monitors the social, labour and environmental performance of 1500 companies in Canada. The organizations researched and independently-tracked include public and private Canadian corporations, non-publicly traded companies, and foreign-based transnationals operating in Canada. The areas of corporate social responsibility analysis include environmental performance, progressive staff policies, charitable giving and community responsibilities, sustainability management, military-related production, sensitive business activities, gender and family issues, and ethical sourcing and trading.

A 'Partnership Screening Report' can be ordered via EthicScan ([www.ethicscan.ca](http://www.ethicscan.ca)) by following Peterborough Public Health (PPH) procurement policies and procedures. Staff should also verify that a scan has not previously been done by the organization; completed scans are saved in the following shared network file: PCCHU > Sponsorships > Completed EthicScans.

## **2.2 Are the sponsor's expectations pertaining to control, oversight, and outcome(s) of the sponsorship and/or project to which the funds are applied acceptable to PPH?**

As stated in the Principles for Corporate Sponsorship, PPH will accept funds only when PPH has control of the content of the activity and when PPH has and maintains complete control of all funds.

Issues to consider:

1. Does PPH have editorial control over the content of educational materials and publications and input into their dissemination?
2. Will PPH be able to review and approve public statements about the project, its findings and/or implications? Will PPH be in control of the funds at all times?
3. Are expectations on outcome, responsibilities, methods of implementation, and duration of funding feasible and agreeable? (Any special expectations of the sponsor need to be explicit and documented).

### **2.3 Are the sponsor's expectations regarding recognition or acknowledgment of their support acceptable to PPH?**

As stated in the Principles for Corporate Sponsorship, acknowledgments will be limited to company name, logos, slogans which are an established part of the supporter's identity, trade names, addresses and telephone numbers.

Issues to consider:

1. Is the extent to which the name of the corporation is affiliated with PPH and the proposed project defined by PPH acceptable to the sponsor?
2. What public recognition is expected by the sponsor?
3. Is the recognition appropriate for the amount of the sponsorship?
4. Is there an appearance of product endorsement?

### **2.4 Would acceptance of the sponsorship create any real or apparent conflicts of interest, and would the impact and/or benefits of accepting the sponsorship outweigh the risks of partnering with the sponsor?**

In considering the following issues, PPH recognizes the need to adhere to its principles and to weigh the benefits and risks of accepting the sponsorship from the sponsor as opposed to weighing just the opportunity of not accepting the actual dollar sponsorship.

Issues to consider:

1. Are there any personal, financial, or professional gains for PPH staff, members or other volunteers, which create a conflict of interest?
2. What is the impact of the sponsorship and benefits to the public and public health?
3. Does the sponsor's image support or detract from PPH?
4. Do the impact and/or benefit outweigh the risks of collaborating with the potential sponsor?

## **3. Process for Reviewing a Sponsorship**

### **3.1 Role of the Executive Committee:**

The Executive Committee is responsible for:

1. Reviewing all sponsorships of \$5,000 or more for sponsor adherence to the criteria established in this policy;
2. Making the final decision about sponsor adherence to the policy on sponsorships of \$5,000-\$24,999;
3. Reporting to the full Board of Health through the Medical Officer of Health the outcomes of the reviews of sponsorships of \$5,000-\$24,999 and making recommendations for the Board's consideration on sponsorships of \$25,000 or more;

4. Reviewing all sponsorships that provide high-profile recognition and making recommendations to the Board;
5. Identifying more efficient review procedures and/or gaps in the process; and
6. Proposing to the Board of Health modification to the policy.

Reviews of sponsorships may be done via conference calls or e-mail.

In the event that the Executive Committee cannot reach consensus, the Medical Officer of Health will carry the final decision (on sponsorships of \$5,000-\$24,999) or recommendation to the Board of Health (on sponsorships of \$25,000 and more).

## **APPENDIX A**

### **Peterborough Public Health (PPH) Principles for Corporate Sponsorship**

PPH will focus on purposes consistent with its strategic priorities and comply with the following “Principles for Corporate Sponsorship” in soliciting all sponsorships. These Principles will be discussed with all sponsors during the early stages of discussions.

#### **Principles for Commercial Support or Sponsorships**

1. PPH will at all times maintain an independent position on public health issues and concerns.
2. PPH will solicit and accept support only for projects and activities that are consistent with the agency’s mission.
3. PPH will accept funds for informational and educational activities only when the content is to be determined or verified by PPH or an independent body of public health professionals designated by PPH.
4. PPH will maintain complete control of all funds provided from commercial supporters for educational activities.
5. PPH will not permit commercial product promotions as part of a Continuing Education activity.
6. Acknowledgments for commercial support will be limited to company name, logos or slogans which are an established part of the supporter’s identity, trade names, addresses and telephone numbers.
7. PPH’s intangible intellectual assets, including the agency’s name and logo, will be protected at all times. Sponsors will not be permitted to use PPH’s name or logo for any commercial purpose or in connection with the promotion of any product.
8. PPH will be vigilant at all times to avoid any real or apparent conflict of interest in accepting sponsorships.

Any situation that may be an exception to this Policy or these Principles will be reviewed by the Executive Committee in consultation with the Chair of the Board of Health. Together, they shall interpret this policy in good faith.

#### **Review/Revisions**

**On** (YYYY-MM-DD): 1994-06-08

**On** (YYYY-MM-DD): 2001-08-07

**On** (YYYY-MM-DD): 2011-09-11

**On** (YYYY-MM-DD): 2013-05-08

**On** (YYYY-MM-DD): 2013-08-29

**On** (YYYY-MM-DD): 2016-01-04

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