

Policy Direction – Third Party Fundraising, Fundraising Partnerships, Sponsorships, and Cause Marketing Partnerships

Rationale and Relationship to Mission, Principles and Values

The Multiple Sclerosis Society of Canada (MS Society) relies on the generosity and kindness of individuals, groups, and businesses to raise funds for MS research, programs and services. This policy enables people who are committed to help the MS Society, contribute financially outside of making a personal or corporate donation or participating in an established MS Society fundraiser.

Policy Objective

Third Party Fundraising - To enable individuals, groups, and businesses to fundraise on behalf of the MS Society and to define third party fundraising for the MS Society.

Fundraising Partnerships - To enable individuals, groups, and businesses to partner with the MS Society to raise funds for the MS Society's mission and to define a fundraising partnership for the MS Society.

Sponsorships - To enable businesses to support MS Society events, programs, and activities through a mutually beneficial exchange of benefits and to define corporate sponsorships with the MS Society.

Cause Marketing Partnerships - To enable businesses to partner with the MS Society to raise funds and awareness for the MS Society's mission with mutual benefit, and to define cause-marketing partnerships with the MS Society.

Policy Application

This policy applies to all levels and locations of the MS Society including the national office, all divisions and chapters.

Authorization

This policy was first approved by the board of directors of the MS Society of Canada on November 20, 2009.

Policy Details

Third Party Fundraising

The MS Society shall assume no legal or financial liability associated with the event. The organizer assumes all risk for expenses and liabilities.

The MS Society shall not be responsible for the cost or execution related to promotion and/or staging of a third party event. No funding, logistical support, cash advances or financing will be provided by the MS Society to execute the event. The organizer is also liable and responsible for any applicable and appropriate licenses, permits, insurance, and compliance with municipal, provincial, or federal laws and bylaws.

Third party fundraisers are encouraged to read and understand the MS Society of Canada's various policies, including this policy, the *Acceptance of Gifts* policy, the *Branding and Graphics Standards*, and others.

In order to access MS Society third party fundraising tools and resources, fundraisers must register through the MS Society's online third party program (ichallengems.ca).

Fundraising Partnerships

A fundraising partnership is a business relationship with an external individual, group, or business with a written agreement and expectations of both parties.

If explicitly and mutually agreed to with the partner, the MS Society may be responsible for some of the cost or execution related to promotion and/or staging of the fundraising event or promotion. At the discretion of the MS Society, resources such as staff time, expertise, marketing material development or promotion may be provided by the MS Society to hold the event or promotion. The MS Society is not responsible or liable for any activity or financial commitment beyond the agreement.

Before promoting or spending money, interested fundraising partners must meet MS Society criteria and demonstrate legitimate benefit to the MS Society. Partnership activities must not conflict with existing MS Society events and activities.

Fundraising partnerships with scope limited to a specific division require an explicit written agreement signed by the respective MS Society division president, ensuring compliance with MS Society policies and procedures. Partnerships with a multiple division, regional (e.g. Western Canada) or national scope require an explicit written agreement signed by the chief marketing and development officer.

Sponsorships

A sponsor is any company providing support either financial or in-kind, to an MS Society event, program, or activity, in exchange for a business-related benefit with a written agreement and expectations of both parties.

Upon written agreement between the sponsor and the MS Society, both parties are responsible to execute the terms and conditions of the agreement, which may involve financial resources, staff time, and associated marketing. Any sponsorship agreement must comply with the MS Society's policy directions, including *Acceptance of Gifts, Conflict of Interest, and Pharmaceutical Industry Relationships* (if applicable).

A sponsorship does not constitute an endorsement by the MS Society of a sponsor's products or service. The decision to associate with a product, service, or program is not deemed an endorsement.

Sponsorships with a scope limited to a specific division require an explicit written agreement signed by the respective MS Society division president, ensuring compliance with MS Society policies and procedures. Sponsorships with a multiple division, regional (e.g. Western Canada) or national scope require an explicit written agreement signed by the chief marketing and development officer.

Cause Marketing Partnerships

A cause marketing partnership is a mutually beneficial partnership between a business and the MS Society that generates money and donations by leveraging the business' product or service.

If explicitly and mutually agreed to with the partner, the MS Society may be responsible for some of the cost or execution related to promotion and/or staging of the cause marketing. At the discretion of the MS Society, resources such as staff time, expertise, marketing material development or promotion may be provided by the MS Society to hold the event or promotion. The MS Society is not responsible or liable for any activity or financial commitment beyond the agreement.

Before promoting or spending money, interested fundraising partners must meet MS Society criteria and demonstrate legitimate benefit to the MS Society. Partnership activities must not conflict with existing MS Society events and activities.

A cause marketing partnership does not constitute an endorsement by the MS Society of a partner's products or service. The decision to associate with a product, service, or program is not deemed an endorsement.

Cause marketing partnerships with scope limited to a specific division require an explicit written agreement signed by the respective MS Society division president, ensuring compliance with MS Society policies and procedures. Cause marketing partnerships with a multiple division, regional (e.g. Western Canada) or national scope require an explicit written agreement signed by the chief marketing and development officer.

For Third Party Events, Fundraising Partnerships, Sponsorships, and Cause Marketing Partnerships

The MS Society of Canada will not enter into a third party, fundraising partnership, sponsorship, or cause marketing partnership that negatively affects the MS Society's reputation, brand, charitable status, or opens the MS Society to unacceptable risk or liability. In the case of fundraising partnerships, sponsorships, and cause marketing partnerships where the MS Society commits resources, all of the aforementioned relationships must adhere to the MS Society's policies, by-laws, as well as municipal, provincial, and federal laws.

The appropriate level of the MS Society must review and approve all promotional material, media releases and advertising copy that include mention of the MS Society and/or use of the appropriate branding. Permission to use any version of an MS Society logo will be given once the events have been formally approved in writing.

Any promotional material must be consistent with the MS Society's *Branding and Graphics Standards* and all subsequent volumes of the Communication Guide.

All funds received from third party fundraising events, fundraising partnerships, sponsorships, and cause marketing partnerships are considered undesignated unless requested otherwise in writing prior to the event or partnership. Requests to designate funds for specific use are subject to approval in writing by the MS Society, as stated in the *Acceptance of Gifts* policy.

All fundraisers must comply with both CRA guidelines and regulations around tax receipting, as well as with MS Society policies for tax receipting.

The executive team is authorized to develop detailed procedures for the application of this policy.

Executive Champion

The MS Society chief marketing and development officer (CMDO) is the executive champion of this policy direction.

Monitoring and Compliance

The MS Society CMDO is responsible for leading the monitoring and promotion of the application and compliance of this policy in conjunction with other members of the executive team. The CMDO will work with appropriate staff to ensure compliance.

Related Policies, Legislation

This policy direction, along with other fundraising policy directions, forms the umbrella of policies under which fundraising activities, campaigns and events are conducted within the MS Society.

Policy Review

The policy direction is to be reviewed at a minimum every five years following approval.

Definitions

Third Party Fundraising Event - The MS Society of Canada defines a third party event as any fundraising activity by an individual, community group, school, organization or business, that is planned, executed and financially resourced by external participants.

For example, Walk and Bike Tour participant fundraisers often use third-party events to raise money to be credited to their participation. As such, they are to follow this policy by virtue of the definition of a third-party event, notwithstanding they are also participants in an established MS Society fundraiser.

Fundraising Partnership - The MS Society of Canada defines a fundraising partnership as a business relationship with an external business, organization or individual defined by a written agreement with expectations of both parties.

Sponsorship - The MS Society of Canada defines a sponsorship as a mutually beneficial business relationship where a business provides financial or in-kind support in exchange for marketing or other business-related benefits derived from the purchase of, or association with, assets related to MS Society events, programs, or activities, defined by a written agreement with expectations of both parties.

Cause Marketing Partnership - The MS Society of Canada defines cause marketing as a mutually beneficial partnership that leverages a business' marketing, product, or service assets to provide financial support to the MS Society, defined by a written agreement with expectations of both parties.

Executive Team – The most senior level of staff leadership within the MS Society comprised of the president and chief executive officer, division presidents, chief marketing and development officer, national vice-presidents of talent, research, programs and services, government relations, shared services (finance, IT, real estate). One person may hold more than one position. The president & chief executive officer may alter the composition of the Executive Team as required from time-to-time.