



**Canadian Cardiovascular
Society**

Leadership. Knowledge. Community.

**Société canadienne
de cardiologie**

Communauté. Connaissances. Leadership.

CANADIAN CARDIOVASCULAR SOCIETY

External Relations Policy

Updated 2012

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Outline

This document lays-out CCS's philosophy, policy and procedures for sponsorship, endorsement and recognition of projects that build on the previous policy. The second half of the document describes CCS's policy on strategic alliances and partnerships.

By establishing formalized (strategic) relationships with organizations that the CCS has shared goals with as well as close ties, it will enable enhanced working relationships with CCS partners and allies. For example, CCS affiliates already have established ties with the CCS and this would be positively weighted in decisions related to their request for collaboration and support.

Statement of Need

As the national voice for Canadian cardiovascular physicians and scientists, the CCS is frequently approached with requests from various organizations and/or individuals for various levels of sponsorship, endorsement and/or collaboration. This document outlines the CCS policy and procedures, which will govern such requests and the CCS interactions with other organizations and/or individuals.

CCS Philosophy and the Guiding Principles for the CCS Policy for Endorsement of Activities Initiated by Other Organizations and for Interacting with Other Organizations

The mission of the CCS is to promote cardiovascular health and care through knowledge translation, professional development and leadership in health policy.

Important objectives of the CCS include:

- a) to enable and promote initiatives which are expected to improve the cardiovascular health of Canadians;
- b) to enable and promote activities which are expected to enhance opportunities for the professional development of its members;
- c) to represent Canadian cardiovascular physicians and scientists in their interactions with governmental, scientific, academic, professional, industry and other organizations;
- d) to enable, facilitate and promote interactions with other like-minded organizations around the world in the global effort to reduce the burden of cardiovascular disease.

The CCS recognizes the complexity of its mission and its objectives and the increasing need for national and international collaboration in order to achieve its goals. Therefore, the CCS encourages collaborations and initiatives that foster the fulfillment of its mission and objectives, but at the same time recognizes its responsibility to the membership to maintain the good name and credibility of the CCS. Moreover, the CCS needs to consider additional factors, such as:

- a) CCS strategic priorities (these may change over time);
- b) addressing unique needs of Canadian cardiovascular specialists, scientists and their patients;
- c) benefits of various initiatives to its members;
- d) protecting opportunities for the CCS and its members;
- e) resources.

Endorsement Policy and Procedure

Except as provided in this policy statement, the CCS does not endorse private, commercial publications or programs. No publication, bulletin, announcement, advertising material, letterhead, or other document or article or object other than the official publications and products of the CCS shall bear any insignia, monogram, or other mark of CCS in a manner implying the approval thereof has been secured from CCS, unless express written consent has been secured from the CCS.

CCS recognizes that endorsements and expressions of support and co-sponsorship of certain activities conducted by other organizations or individuals in public or private service may serve the best interest of the CCS and its membership.

When requests for sponsorship or endorsement of activities or projects initiated and/or carried out by other such organizations or individuals are made, pursuant to the policies adopted by the CCS Executive Committee, they are to be reviewed by the CCS External Relations' Committee on a monthly basis.

The CCS Standing Committee on External Relations will review and approve the majority of endorsement requests such as the recognition of a conference involving the Canadian cardiovascular community or the use of the CCS logo for a CCS affiliate meeting.

Requests for strategic partnerships from organizations outside the usual scope of recognized CCS associated groups or that involve large sums of money (\$100,000+) or human resource contributions will be reviewed by the committee and then sent to the executive committee for their consideration.

CCS Sponsorship

The CCS sponsors a limited number of events, lectures, speakers or other initiatives each year depending on its priorities set by CCS Council and Executive and on budgetary considerations. Generally, such sponsorships pertain to well-recognized national or regional events or initiatives open to all Canadian cardiovascular specialists and when a CCS member is actively involved in the organization of the project. Sponsorships are considered based on fulfillment of the eligibility criteria, the requested sponsorship amount and available funds (see application Appendix A).

Eligibility Criteria for CCS Sponsorship

1. The proposal must support the mission of the CCS.
2. The proposal content is primarily directed at Canadian cardiovascular specialists.
3. The proposal must be international, national or regional in scope and/or be recognized as of major importance to the CCS and its membership.
4. The program/content/initiative must be free of commercial bias.
5. A detailed budget explaining how the requested sponsorship funds will be used.
6. All other possible sources involved in the planning and/or funding of the program/project must be disclosed.
7. A detailed description of the proposal must be provided including:
 - a. objectives;
 - b. how it supports the CCS mission;
 - c. how it benefits the CCS membership;
 - d. specific details regarding the proposal content, how it will be conducted and who will be involved in program;
 - e. information regarding timing, location and intended audience.

CCS Endorsement and Use of the CCS Logo

CCS Endorsement is defined as “expressing approval of the general scope and objectives, the content and the process of planning and preparing” of a program/project/initiative. Such endorsement is signified by the CCS name and logo being affiliated with the program or event.

Use of the CCS Logo

The CCS is often asked to use its logo by its members, chapters and other affiliated organizations or others. It is imperative for the CCS to put strict conditions and limitations on the usage of its logo. Failure to do so can jeopardize the CCS's trademark rights in its own logo, create potential liabilities, damage the organization's brand, create the false impression of an association endorsement or guarantee where one does not otherwise exist.

Endorsements are usually reserved for proposals that have been reviewed by the CCS staff, External Relations Committee and/or (finally) Executive. Endorsement is granted when the initiation of the project has a CCS designated person on the writing or event executive committee.

The CCS recognizes however, that there are circumstances when involving the CCS in the planning of certain projects/programs/initiatives, which support its mission and its responsibilities towards its membership, may not be always feasible or practical. Therefore, while involving the CCS in the planning of any projects/programs/initiatives which seek its endorsement is preferable, the CCS will consider endorsing projects/programs/initiatives, when these are of major importance to its membership.

Eligibility Criteria for Endorsement

1. The proposal must support the mission of the CCS.
2. The proposal content is primarily directed at Canadian cardiovascular specialists.
3. The proposal must be international, national or regional in scope and/or be recognized as of major importance to the CCS and its membership.
4. The program/content/initiative must be free of commercial bias.
5. All sources involved in the planning and/or funding of the program/project must be disclosed.
6. A detailed description of the proposal must be provided including:
 - a. objectives;
 - b. how it supports the CCS mission;
 - c. how it benefits the CCS membership;
 - d. specific details regarding the proposal content, how it will be conducted and who will be involved in program;
 - e. information regarding timing, location and intended audience.

Continuing Professional Development (CPD) - accreditation not endorsement

The CCS seeks to foster knowledge translation by accrediting CPD programs for the Royal College of Physicians and Surgeons of Canada (Royal College). As such, the CCS will not endorse any non-accredited CPD programs that are targeted at the Canadian cardiovascular professional community. Developers of these CPD programs must apply to the CCS for Royal College accreditation.

Procedures

Procedure for Requesting CCS Sponsorship or Endorsement

The following is the process for requesting CCS sponsorships or endorsements and for the handling of such requests:

- I. All such requests must be presented to the Executive Director of CCS
- II. Requests must be made in writing and must provide the following:

A. Information about the program or activity:

1. What are the objectives of the proposal and how do these support the CCS mission?
2. What need is being met by the program/project/initiative?

Categorize requests: are they looking for

- a) Sponsorship of a program/project/initiative
 - b) Endorsement of a proposal
 - c) Reviewers of a proposal
 - d) Speakers that represent the CCS
 - e) Dissemination help for a proposal
3. When and where will the program/activity take place?
 4. How will the program/activity be delivered?
 5. How will the program/activity be promoted?
 6. Who is the intended audience?
 7. What CCS resources, if any, will be required?
 - a) Human
 - b) Financial
 - c) Technical

B. Details about the parent organization requesting support

1. The organization's mandate, objectives, beliefs
2. Reasons for seeking CCS support
3. All other sources of funding

C. Checks and Balances

1. What are the implications if demand dramatically exceeds or falls short of expectations?
2. What checks and balances are in place to ensure that members and volunteers of your organization (that is requesting support from the CCS) are free of allegations of criminal activity and are of ethical behavior?
3. How will your organization ensure the desired level of organizational standard?

Endorsement requests from CCS members or from other professional, academic or not-for-profit organizations (e.g. the CMA, universities, the Heart and Stroke Foundation) will take priority and will be reviewed free of charge.

Endorsement requests from for profit organizations (e.g. pharmaceutical companies) will be charged a fee of \$500. Such requests will be considered only if designed to be free of commercial content and bias.

CCS Review Process and Decision Criteria

All requests will be reviewed by the CCS staff assigned to support the External Relations' Committee. If required information is missing, the CCS staff will contact the organization applying for CCS sponsorship or endorsement and will request additional information. Once an application is completed the CCS staff will tabulate the information and make a recommendation. All requests will be reviewed by the External Relations' Committee, which will convene every two months. The External Relations' Committee will recommend if requests should be approved or not (this will involve in depth review of each application). These recommendations will be presented to the CCS Executive Director and the CCS Executive if or when deemed necessary to CCS Council.

Partnerships and Strategic Alliances Definitions

A **strategic alliance** is usually a less formal partnership. It is the simplest form of joint activity requiring little or no capital investment. It can be conducted within a shorter timeframe, and it does not require a formal agreement. Advocacy initiatives are often strategic alliances.

An example of a strategic ally would be the Canadian Medical Association that has a similar mission statement, membership base, meetings and goals. The American College of Cardiology may also be considered to be a strategic ally as the CCS currently co-ordinates a number of joint symposium as well as the cross-promotion of each other's annual meetings.

A **partnership**, as the term indicates, is a joint activity which is more prescribed and is usually conducted within a long timeframe. There is, customarily, a significant investment made by all parties in the partnership, and all parties stand to benefit or lose from the arrangement. Partnerships often relate to product and service delivery.

An example of a strategic partner would be the CCS affiliates (CHRS, CSE, CAIC, CACH, etc.) that has a similar mission statement, membership base, meetings and goals.

Guiding Principles

The seeking out of strategic alliances and partnerships and their development and maintenance shall be guided by the following principles:

1. Only organizations deemed appropriate and compatible with the vision, mission, goals, strategies and policies of CCS will be considered.
2. The objectives of the alliance or partnership and the responsibilities and accountabilities need to be clearly defined, understood and complied with.
3. The alliance or partnership will result in benefits to the CCS members.
4. Fairness in the distribution of anticipated benefits among the CCS and allied or partnered organizations.
5. Fairness in the distribution of contributions made by the CCS and allied or partnered organizations.
6. Information shared between CCS and partnered or allied organizations must be kept confidential, when applicable.
7. The alliance or partnership will not lead to use of CCS funds and resources which may jeopardize other CCS initiatives.
8. Strategic alliances and partnerships will be formalized through a Memoranda of Understanding, Letters of Understanding, or a Contract.

Proposals for strategic alliance or partnership, whether generated internally or external to the CCS, will be evaluated on a case-by-case basis to ensure that the above principles are respected and that the relationship is in the best interest for the CCS and its members.

Termination of strategic alliances will occur when and if:

1. The agreed upon duration of the relationship has elapsed;
2. The relationship no longer respects the above guiding principles or the terms of the formal written agreement have been breached;
3. The strategic alliance organization uses the CCS name or logo outside of the original agreed-upon without prior formal written consent; or
4. The strategic alliance organization develops a public image deemed contrary to the CCS' values and the principles outlined above.

Procedures

Each proposal for a strategic alliance or partnership will be required to include a detailed, formalized report on the nature of the proposed relationship and its value to the CCS and its members.

The CCS staff assigned to assist the External Relations Committee will tabulate all requests for strategic alliance or partnership and these will be reviewed by the External Relations Committee, which will convene every two months on a case-by-case basis, considering the principles outlined in section 4.2.

As deemed necessary and appropriate, CCS staff and/or the members of the External Relations Committee will act on behalf of the CCS in order to further explore the possible nature of proposed alliances and partnerships. This may involve direct contact and negotiations with the organization(s) proposing an alliance or a partnership.

The External Relations' Committee will recommend if requests should be approved or not. These recommendations will be presented to the CCS Executive Director and the CCS Executive. CCS council will be required to approve any proposed alliance or partnership.

A letter responding to each request will be sent within 1 month; if a decision cannot be reached within this time period the letter will inform the organization seeking an alliance or partnership about the status of their request.

Requests to become a strategic partner with the CCS will take longer than a month for an official response. Such requests will need to be approved by the CCS Council.

When the CCS decides to enter a strategic alliance or partnership a Memorandum of Understanding, Letter of Understanding or Contract will be finalized. In addition to legal aspects this document will be required to address the following:

1. Goals and expected outcomes;
2. Clarification as to organizational boundaries and ownership issues;
3. Identification of a process for communication and decision-making;
4. Reference to financial costs and responsibilities;
5. An evaluation process, including the use of performance indicators;
6. The arrangement timelines and dates for deliverables;
7. Identification of specific responsibilities for those involved.

CCS staff shall arrange for:

Support of the arrangements as agreed to by CCS;

1. CCS Council and staff orientations to include information on strategic alliances and partnerships currently in place;
2. A list of all strategic alliances and partnerships to be maintained. The list shall indicate the name of the organization, the purpose, the date and information on expected deliverables;
3. Reports to CCS Council and Executive on the progress of arrangements; and the termination of arrangements, if required.

Appendix A: Request for sponsorship/endorsement application form (Please Print)

Title and type of program: _____

Date and location (if applicable): _____

How does the proposal support the mission of the CCS? _____

Please include your organization's mandate, objectives, and beliefs: _____

Describe how the content is primarily directed at Canadian cardiovascular specialists: _____

Is the proposal's scope international, national or regional and is it of importance to the CCS and its membership: _____

Describe how the program/content/initiative is free of commercial bias? _____

Please include a detailed budget explaining how the requested sponsorship funds will be used: _____

All other possible sources involved in the planning and/or funding of the program/project must be disclosed: _____

Please describe what CCS resources, if any, will be required, human, financial, technical: _____

Type of support sought Sponsorship Endorsement Recognition Strategic Alliance

If sponsorship, what is the financial contribution requested from CCS? _____

Name of CCS member involved in program/project (all future correspondence will be forwarded this individual: _____

As the CCS member involved in this program/project, I accept responsibility for the accuracy of the information provided in this application.

Signature: _____ Date: _____

*Processing fee of \$500 (\$500+HST/GST) enclosed

For more information, contact:

Director of External Relations
Canadian Cardiovascular Society
222 Queen St. Suite 1403,
Ottawa ON K1P 5V9
Tel: 613 or toll free 877-569-3407 ext 403
ferguson@ccs.ca

Appendix B: Endorsement Process Checklist

This checklist will help you to ensure that all of the relevant information required to complete the endorsement review process has been included

INFORMATION NEEDED:

1. Name of initiative
2. Source of development and financial support
3. Name(s) of person(s) in the organization responsible for development

FURTHER INFORMATION ABOUT THE PROJECT:

- Proposed release date, launch, distribution
- Promotion - is the CCS invited to participate?
- Dissemination (e.g. advertising in Canadian Journal of Cardiology)
- Available in both official languages
- Available through media (print, internet, etc.)
- Print run (number of copies, cost per copy, etc.)

OTHER

- Are the expectations of both parties clear?
- Use of the CCS name and visual identify
- Collaboration for launch and/or distribution
- Type of association
- Financial or staff support that may be required from the CCS
- Does the requester understand the CCS endorsement process?
- Endorsement based on reviews of three members and approval of Executive Committee
- No advance guarantee that the product/document will be endorsed
- Limits of endorsement (e.g. application to reviewed product only)
- Time factor (4 to 6 weeks)
- Executive Committee's decision is final
- Additional costs (e.g. honorariums for reviewers, cost of administration)
- Has the applicant applied for commercial backing
- Who are the other parties involved in this program?

CHECKS AND BALANCES

- What are the implications if demand for the initiative dramatically exceeds or falls short of expectations?
- What checks and balances are in place to ensure that members and volunteers of your organization (that is requesting support from the CCS) are free of allegations of criminal activity and are of ethical behavior?
- How will your organization ensure the desired level of response organizational standard?

¹ Adopted from the College of Family Physicians of Canada (CFPC) policy.
http://www.cfpc.ca/uploadedFiles/Health_Policy/_PDFs/endorsement_process_questions_requester1.pdf