

## Congress & Workshops Funding, Donations and Sponsorship Policy

### I. INTRODUCTION

#### **Purpose**

The World Federation of Public Health Associations (WFPHA) is an international, nongovernmental organization composed of multidisciplinary national public health associations. It is the only worldwide professional organization supporting the global civil society demand for public health and acting as a network for the global community of public health associations (PHA) and their affiliated organizations.

WFPHA organizes bi-triennial World Congress on Public Health as well as workshops and other events to increase knowledge sharing, build capacity, and strengthen partnerships as well as to gather additional funds in order to properly fulfil its mission.

This “Congress & Workshops Funding, Donations and Sponsorship Policy” (adapted from WFPHA Funding, Donations and Sponsorship Policy) describes the criteria, the review and oversight process for the evaluation of potential relationships with external funding entities (EFE) applied to congress, workshops, and similar events. Its main aim is to ensure that the WFPHA is able to fulfil its mission while maintaining its integrity, and to support the Federation’s revenue-generating efforts.

#### **Background**

The Policy has been drafted with the following considerations in mind:

- relationships with the EFEs will be regarded as opportunities to build long term alliances, partnerships and support for public health issues.
- the review process and criteria should be reasonable, realistic and not overly cumbersome.
- over time, the review process will allow the development of a body of knowledge for accepting and soliciting funding, donations and sponsorships.
- the Policy will be reassessed when demanded, according to the evaluation of the WFPHA’s past performance in implementing it.

#### **Application**

This Policy applies to the WFPHA and to all the member associations and organizations which carry out WFPHA-sponsored events or activities wherein the WFPHA’s name, logo or any other identification is used.

The provisions included in this policy shall be applied to all funding, donations and sponsorships received by the WFPHA or congress/workshop partners, being them solicited or unsolicited.

As a general rule, the external entities entitled to provide the WFPHA with financial resources are the following:

- the United Nations or other multilateral bodies.
- national governments and their affiliated agencies or bodies, including universities and research institutes.
- foundations.
- not-for-profit organizations.
- the corporate sector.

## II. GUIDING PRINCIPLES

The acceptance of funding, donations and sponsorships is conditional on four general assumptions to be verified:

1. the WFPHA will solicit and accept financial support only for events and activities that are **consistent with the Federation's mission**.
2. the WFPHA shall not enter into sponsorship or partnership arrangements that compromise its **independence** and/or its ability to act in the best interest of both its members and the public.
3. the **protection of all the WFPHA's intangible intellectual assets** (such as its name and logo) shall be always ensured.
4. when accepting sponsorships, **WFPHA does not explicitly endorse the sponsoring entity** or any of its products: the relationship is limited to the terms and purposes of the sponsored activity and is not to be utilized for direct commercial advantage for any brand or product.

## III. SPECIFIC REVIEW CRITERIA

The purpose of the review of funding, donation and sponsorship opportunities is to compare the costs and benefits of collaborating with an EFE for the WFPHA, its members and the public. The conditions determining the benefits and risks of accepting funding, donations or sponsorships are set out in Appendix I. All opportunities will be assessed on a case-by-case basis.

The following criteria must be met by any sponsorship arrangement:

### 1. **Common aims**

The purpose, aims, values and principles of the sponsoring body must be compatible with the WFPHA's and events partners' ones.

### 2. **Nonacceptable sponsoring businesses/products**

Under no circumstances will the WFPHA nor event partners accept advertising, funding, donations or sponsorship from companies whose practices and/or products may represent a threat to public health. These include (but are not limited to) tobacco and alcohol companies, as well as manufacturers and merchants of firearms and weapons of mass destruction.

The same applies to all those entities which have been sanctioned or deemed inappropriate by the World Health Organization or other UN bodies, unless such sanctions have been lifted.

### 3. **Nonacceptable sponsoring Governments**

Under no circumstances the WFPHA nor event partners will accept advertising, funding, donations or sponsorships from governments and their related agencies which have been

deemed to have committed serious human right violations or have been shown to discriminate against any population or minority.

The same applies to any government or government body that consciously contravenes any International Treaty impacting on health.

#### **4. Recognition of donors**

For reason of transparency, contributions from partners and commercial contributions must be publicly acknowledged in all publications directly relating to the contributions. In the case of multiple EFEs, they should be listed alphabetically or by level of support.

Acknowledgements will be limited to the EFE's name, trade names, addresses, telephone numbers, logos and slogans which are an established part of its identity. Exceptions may be authorized on specific circumstances.

Contributors should not use the results of WFPHA work or event for commercial purpose or see promotion from the fact that they have done a donation. However, contributors are entitled to make reference to donations in their internal official documents such as corporate annual reports. In order to ensure compliance with the above, fundraising letters to, and letters of acceptance of donations, commercial enterprises should be drafted in consultation with WFPHA or events partners. Anonymous donations from the corporate sector may not be accepted under any circumstances.

The following statement may be used as a template for the acknowledgement of multiple sponsoring entities:

"The WFPHA and [event partners name] gratefully acknowledges the support received for [event] from the following contributors".

#### **5. Use of WFPHA name/logo**

No commercial company shall be authorised to use the WFPHA or events partners name or logo for the marketing of its products. No partner shall be authorized to use the WFPHA or events partners name or logo without prior written permission, following the regulations laid down in this policy.

#### **6. Conflict of interest**

The WFPHA and event partners shall be always vigilant to avoid any real or perceived conflict of interest in accepting any kind of financial support. Funds should not be sought or accepted from enterprises which have a direct commercial interest in the outcome of the event or activities of WFPHA and event partners toward which they would be contributing, unless approved by the WFPHA and event partners governing bodies. Considerable caution should be exercised in accepting funding from enterprises that have an indirect interest in the outcome of the activities (i.e. the activity is related to the enterprise's field of interest, without there being a conflict as referred to above). In such event, other commercial enterprises having a similar indirect interest should be invited to contribute. In addition, it is preferable that funds from other sources are secured. The larger the proportion of the donation from any one source, the more scrutiny should be applied in avoiding the possibility of perceived conflict of interest.

Any support received by WFPHA or event partners that are subsequently discovered to be outside the terms of this policy will be returned to the donor by WFPHA or event partners.

#### IV. EVALUATION PROCESS

##### **Assessment, evaluation and approval**

The assessment will be conducted by a dedicated congress/workshop management committee established in agreement with WFPHA governing council and event partners.

The assessment will be based upon the currently available information about the EFE, gathered mainly from its website, newspaper articles and previous contacts with some WFPHA representative.

All the information collected, and the outcomes of the initial evaluation process shall be kept confidential until the final decision is made public.

The congress/workshop management committee has the responsibility for the final decisions regarding funding, donation and sponsorship proposals. In case of doubts, the committee will request inputs from the governing council and corresponding bodies of event partners.

##### **Turnaround time**

Sufficient time should be granted to the congress/workshop management committee in order to gather the necessary material and to the review process itself to take place. However, it is recommended that a reasonable duration of the evaluation and decision-making process be no longer than four weeks.

##### **Reporting**

To keep the process sufficiently transparent, it is recommended that all the reviews of funding, donation and sponsorship opportunities be documented. In case of particularly complex decisions, especially when consensus is not reached, the related documentation shall be extensively detailed.

#### V. TERMINOLOGY

**Donation:** a philanthropic contribution or gift.

**Endorsement:** an explicit approval or a promotional statement for a product or service.

**External Funding Entity (EFE):** any organization, body, agency, foundation or corporation that is not related to or governed by the WFPHA and which could invest in the Federation's activities, events and projects.

**Grant/contribution:** a financial or in-kind investment by an EFE that may or may not be restricted or conditional.

**Sponsorship:** a business arrangement whereby the EFE commits financial or in-kind resources to support a specific project, event or activity of the WFPHA, without sharing the related profits and/or risks.

## APPENDIX I

### Conditions determining the benefits and risks of accepting funding, donations or sponsorships

- A.** Are the specified proposed uses of funding, donations and sponsorships consistent with the WFPHA's mission and priorities?

In order to assess this consistency, it's important to consider:

1. how the proposed uses of funding, donations and/or sponsorships relate to the WFPHA's mission and priorities.
2. the reasons why the EFE wants to fund, make a donation or sponsor the WFPHA.
3. whether the benefits coming from the funding, donation or sponsorship project are consistent with the resources required by the WFPHA to fulfil the intended purpose.
4. whether the practices of the EFE fit well with the public policies adopted by the WFPHA.
5. recognizing that socially responsible practices are a cornerstone of the WFPHA's policies, and that good citizenship should embody socially responsible practices, the following are the issues that should be considered when assessing the risks and benefits of accepting funding, donations or sponsorships from external entities, especially corporations:
  - the types of products and services provided.
  - occupational health and safety conditions under which the products and services are produced and delivered.
  - employment practices, including commitment to diversity and a living wage.
  - commitment to the protection of the environment.
  - record of regulatory compliance.
  - marketing and advertising practices.
  - research and development of policies and practices.
  - human rights records.
  - funder's, donor's or sponsor's relevant public policies position.
  - record of support to public health organizations or public health-related issues and organizations,
  - other past activities to be weighted in relation to the WFPHA's public policies and reputation.

As appropriate, the WFPHA may use or may ask member associations to utilize on its behalf the services of a business ethics consultancy/corporate responsibility research house which helps organizations and individuals behave more ethically. The areas of corporate social responsibility analysis should 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.

- B.** Are the funder's, donor's or sponsor's expectations about control, oversight and outcome(s) of the sponsorship and/or project to which the funds are applied acceptable to the WFPHA?

As stated in Appendix II, the WFPHA will accept funds only when it has complete control over the content of the related activity, and it has and maintain complete control over the usage of all funds.

Main issues to consider:

1. whether the WFPHA has editorial control over the content of educational materials, their publication and dissemination.
  2. whether the WFPHA will be able to review and approve public statements about the project, its findings and implications, and whether the WFPHA will be able to keep the funds under its control at all times.
  3. whether the expectations about outcomes, responsibilities, methods of implementation and duration of funding projects are reasonable and agreeable (any special expectation by the sponsoring entity shall be explicit and documented);
- C.** Are the funder's, donor's or sponsor's expectations regarding recognition or acknowledgment of their support acceptable to the WFPHA?

As stated in Appendix II, acknowledgments will be limited to the EFE's name, logos, slogans which are an established part of the supporter's identity, trade names, addresses and telephone numbers. Issues to consider:

1. Whether the extent to which the name of the EFE is affiliated with the WFPHA's one and with the project defined by the WFPHA is acceptable to the EFE.
  2. what kind of public recognition is expected by the EFE.
  3. whether the recognition is consistent with the amount of funding, donation or sponsorship.
  4. whether there is an appearance of product/service endorsement.
- D.** Is the acceptance of the funding, donation or sponsorship likely to create any real or apparent conflict of interest? Would the risks of accepting the funding, donation or sponsorship outweigh the benefits of partnering with the EFE?

Issues to consider:

1. Whether the acceptance of funds, donations or sponsorships from an EFE produces any personal, financial or professional gains for the WFPHA staff, members or volunteers, thus creating a situation of real or apparent conflict of interest.
2. the impact and benefits of the funding, donation or sponsorship on the public and public health.
3. whether the EFE's image supports or detracts from the WFPHA's one.
4. whether the benefits of the collaboration with the potential EFE outweigh its risks.

## APPENDIX II

### Principles for Funding, Donations and Sponsorships

WFPHA will focus on purposes that are consistent with its strategic priorities and comply with the following “Principles for Funding, Donations and Sponsorships” in soliciting all sponsorships. These Principles will be discussed with all the sponsoring entities during the early stages of discussions.

#### Principles for Funding, Donations and Sponsorships

1. WFPHA will maintain an independent position on public health issues and concerns at all times;
2. WFPHA will solicit and accept support only for projects and activities that are consistent with the Federation’s mission;
3. funds for informational and educational activities will be accepted only when their content is determined or verified by the WFPHA or by an independent body of public health professionals designated by the WFPHA;
4. the WFPHA will maintain complete control over all the funds provided by commercial supporters for educational activities;
5. the WFPHA will not permit commercial product promotions as part of a continuing education activity;
6. the WFPHA does not provide any product or service endorsement;
7. acknowledgements for commercial support will be limited to company’s name, logos or slogans which are an established part of the supporter’s identity, trade names, addresses and telephone numbers;
8. WFPHA’s intangible intellectual assets, including the Federation’s name and logo, will be protected at all times. Sponsors will not be permitted to use WFPHA’s name or logo for any commercial purpose or in connection with the promotion of any product;
9. WFPHA will be vigilant at all times to avoid any real or apparent conflict of interest in accepting sponsorships;
10. Any situation that may represent an exception to this Policy or these Principles will be reviewed by the President and/or President Elect in consultation with the Chair of the Finance Committee and the Governing Council. Together, they shall interpret this Policy in good faith.