

## **Policy Direction – Named Recognition**

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### **Rationale and Relationship to Vision, Mission, and Values**

MS Canada is committed to ensuring that private sector philanthropic support by individuals, corporations, foundations and associations may be effectively recognized through named recognition opportunities where and when appropriate. Moreover, the Society is committed to ensuring that the named recognition it extends to its supporters is meaningful to them, fair, equitable and appropriate in relation to the support provided, consistent with MS Canada’s vision, mission and strategic framework, and strategically aligned with the organizations brand.

### **Policy Objective**

This policy sets out the principles, authority and procedures for the naming MS Canada assets in recognition of financial contributions from individuals, corporations, charitable foundations, organizations, and others. Naming protocols as stated in this policy do not apply to corporate sponsorships.

### **Guiding Principles**

This policy is based on the following guiding principles that are supplemented by policy details:

- MS Canada assets considered for named recognition include research projects and grants, research programs, trainee financial awards, programs, services and events. MS Canada branded assets (e.g. The MS Knowledge Network) are excluded from named recognition opportunities.
- Named recognition opportunities are offered in recognition of donations of \$50,000 and above.

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| <i>Frequency of review:</i>      | Three years or less                    |
| <i>First approved:</i>           | December 15, 2021                      |
| <i>Last reviewed:</i>            | October 27, 2022                       |
| <i>Next scheduled review:</i>    | October 2025                           |

- All assets, named after the implementation of this policy, will not exceed a maximum period of naming of five years from the date of recognition unless approved by the MS Canada Board of Directors.
- All opportunities for named recognition will be based upon the budgeted amounts required for that particular project, grant, award, program or service.
- The Executive Team will review and approve all named recognition. The Vice-President, Philanthropy and Philanthropy Team will manage the activation, tracking and reporting of named recognition.
- Honorary named recognition may be considered on a case-by-case basis. Only in exceptional circumstances will assets be named to honor outstanding service of members of the MS community and this will be at the discretion of the MS Canada’s Board of Directors.

## Policy Details

In addition to the guiding principles, this policy is based on the fundamental premise that:

- MS Canada retains the sole right to name, rename or change a name, or withdraw naming rights of any MS Canada assets.
- No named recognition is in perpetuity. All named recognition will have a definitive end date and donors will be offered first right of refusal (in a reasonable time not to exceed 120 days) to renew the naming before it is offered to another donor.
- Available opportunities for named recognition will be maintained and updated by MS Canada’s Philanthropy Team in collaboration with the Executive Team
- Named recognition opportunities hold no commercial value.
- Named recognition will commence upon receipt of the first pledge payment or 20% of the pledged amount, whichever is larger.
- Naming privileges do not entitle the donor to control or influence any aspect of the research project, grant, research program, trainee financial award, program, service or event named.

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- Named recognition expenditures will not exceed 2% of the value of the gift. Expenses include events, marketing and publicity, along with any other expenses associated with recognizing a gift. The cost of recognition is the responsibility of MS Canada and comes out of the gift amount.

Naming shall not be bestowed on any individual, corporation, charitable foundation or organization if it:

- Is likely to undermine or negatively impact the image, reputation or public perception of MS Canada.
- Involves products, services or practices that are associated with unhealthy lifestyles (i.e. tobacco, alcohol, etc.).
- Creates or is likely to lead to a conflict of interest.
- Is inconsistent with the purpose or use of MS Canada asset being named.
- Is likely to be perceived as controversial or divisive to the community MS Canada serves.
- Is perceived to have an advertising intent.
- Implies endorsement of a specific commercial product or a partisan political or ideological position. This does not preclude named recognition for individuals who hold, or at one time held, public office, or companies that manufacture and distribute commercial products.
- MS Canada reserves the right to decline gifts with naming requests that fall outside of this policy, cannot be reasonably met, infringe upon the rights of other donors, or bring the reputation of MS Canada into disrepute.
- Realized charitable bequests are eligible for named recognition opportunities.

### **Duration of Naming**

- No research projects and grants, research programs, trainee financial awards, programs, services and events will be named in perpetuity.
- Where the term of named recognition has not been fulfilled due to the discontinuation of a research project and grant, research program, trainee financial award, program, service or event, the named recognition will be retained for another comparable project, program,

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service or event. This process will be conducted in close consultation with the donor.

- Where the term of named recognition is ending, the existing donor will have the first right of opportunity to provide a new gift at current market value to continue to name the research project, grant, research program, trainee financial award, program, service or event upon the expiration of the original naming period. MS Canada will make reasonable efforts to present this opportunity.

### **Named Recognition Opportunities**

- Named recognition requires the individual name to be used in all external communication about the research project, grant, research program, trainee financial award, program, service or event.
- An inventory of available named recognition opportunities and associated valuations will be developed and maintained by MS Canada’s Philanthropy Team for review and approval.
- An active list of named recognition opportunities will be brought forward by the Philanthropy Team and reviewed annually by the Executive Team. Any new opportunity for named recognition would be required to be reviewed and approved by the Executive Team.
- Valuation of named recognition opportunities is based on the consideration of market conditions, project or program costs, visibility, and relevance to the organizational mission.

### **Changes In and Revoking of Naming**

- Donors may wish to change the recognition conferred. Such changes initiated by the donor will be reviewed by MS Canada. If a name change is requested by a donor and bears an associated cost in materials replacement, etc. the donor will be asked to bear the cost of the change.
- MS Canada reserves the right to remove, at its discretion, named recognition if the donor’s conduct is unbecoming and is detrimental or harmful to the reputation, mission, or position in the community of MS Canada.
- If a donor is unwilling or unable to fulfill a pledge for which named recognition has been conferred, MS Canada will attempt to find

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alternative named recognition commensurate with the portion of the pledge that has been fulfilled.

- Pledge payments received prior to revocation of named recognition will not be returned to the donor according to the rules of the Canada Revenue Agency.

## **Documentation and Approval**

- All agreements for named recognition must be in writing and signed by the donor, the Vice-President, Philanthropy, and either the Vice-President, Corporate Services or the President and CEO.
- All agreements should address the named recognition opportunity and named recognition, the amount of the gift, the duration of the pledge and the duration of the named recognition.
- MS Canada’s Philanthropy Team will administer and manage the named recognition process in collaboration with the donor and the functional unit directly affected by the named recognition. All public communication regarding named recognition, the changing of a name, or revoking of a name should be done in collaboration with MS Canada’s Marketing and Communications Team.

## **Policy Application**

This policy is applicable to all staff at all levels of the organization, as well as any volunteers involved in fundraising.

## **Authorization**

This policy was approved by the Board of Directors on December 15, 2021 but has undergone a subsequent major modification. The revised version was approved by the Board of Directors on October 27, 2022.

## **Executive Champion**

MS Canada’s Vice-President, Philanthropy is the Executive Champion for the Named Recognition Policy.

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**Monitoring and Compliance**

MS Canada’s Vice-President, Philanthropy is responsible for leading the monitoring of the application and compliance of this policy direction in conjunction with the Vice-President, Corporate Services and other members of the Executive Team. The Vice-President, Philanthropy will review the policy on an annual basis with the Vice-President, Corporate Services and Executive Team 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 MS Canada.

**Policy Review**

This policy is to be reviewed a minimum of every three years following approval.

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