

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

Rationale and Relationship to Vision, Mission, and Values

MS Canada 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 MS Canada, contribute financially outside of making a personal or corporate donation or participating in an established MS Canada fundraiser.

Policy Objective

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

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

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

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

Policy Application

This policy applies to all levels and locations of MS Canada.

Authorization

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

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<i>Applies to:</i>	All volunteers and staff at all levels
<i>Frequency of review:</i>	Three years or less
<i>First approved:</i>	November 20, 2009 by National Board of Directors
<i>Last reviewed:</i>	May 19, 2021
<i>Next scheduled review:</i>	May 2024

Policy Details

Third Party Fundraising

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

MS Canada 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 MS Canada 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 MS Canada's various policies, including this policy, the *Acceptance of Gifts* policy, the *Branding and Graphics Standards*, and others.

In order to access MS Canada's third party fundraising tools and resources, fundraisers must register through the MS Canada's third party program platform (wechallengems.ca) or a PayPal verified platform such as a Facebook Fundraising and Go Fund Me.

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, MS Canada 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 MS Canada, resources such as staff time, expertise, marketing material development or promotion may be provided by MS Canada to hold the event or promotion. MS Canada 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 Canada's criteria and demonstrate legitimate benefit to MS Canada. Partnership activities must not conflict with existing MS Canada events and activities.

Fundraising partnerships with scope limited to a specific community require an explicit written agreement signed by the Senior Director, Community Fundraising ensuring compliance with MS Canada policies and procedures. Partnerships with multiple communities (e.g. Western Canada) or national scope require an explicit written agreement signed by the vice president, community.

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Sponsorships

A sponsor is any company providing support either financial or in-kind, to an MS Canada 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 MS Canada, 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 MS Canada's policy directions, including *Acceptance of Gifts, Conflict of Interest, and Pharmaceutical Industry Relationships* (if applicable).

A sponsorship does not constitute an endorsement by MS Canada 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 community require an explicit written agreement signed by the Senior Director, Community Fundraising, ensuring compliance with MS Canada's policies and procedures. Sponsorships with multiple communities (e.g. Western Canada) or national scope require an explicit written agreement signed by the Vice President, Philanthropy.

Cause Marketing Partnerships

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

If explicitly and mutually agreed to with the partner, MS Canada may be responsible for some of the cost or execution related to promotion and/or staging of the cause marketing. At the discretion of MS Canada, resources such as staff time, expertise, marketing material development or promotion may be provided by MS Canada to hold the event or promotion. MS Canada 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 Canada criteria and demonstrate legitimate benefit to MS Canada. Partnership activities must not conflict with existing MS Canada events and activities.

A cause marketing partnership does not constitute an endorsement by MS Canada 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 community require an explicit written agreement signed by the Senior Director, Community Fundraising,

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ensuring compliance with MS Canada policies and procedures. Cause marketing partnerships with a multiple community (e.g. Western Canada) or national scope require an explicit written agreement signed by the Vice President, Philanthropy.

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

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

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

Any promotional material must be consistent with MS Canada’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 MS Canada, 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 Canada policies for tax receipting.

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

Executive Champion

The MS Canada Vice President, Community and Vice President, Philanthropy are the executive champions of this policy direction.

Monitoring and Compliance

The MS Canada Vice President, Community and Vice-President Philanthropy are responsible for leading the monitoring and promotion of the application and

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compliance of this policy in conjunction with other members of the executive team. The Vice President, Community and Vice President, Philanthropy 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 MS Canada.

Policy Review

The policy direction is to be reviewed at a minimum every three (3) years following approval.

- November 20, 2009 – first approved by the Board of Directors
- February 2015 – revised and approved
- February 2019 – revised and approved
- May 2021 – revised and approved

Definitions

Third Party Fundraising Event - MS 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, MS Walk and MS Bike 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 Canada fundraiser.

Fundraising Partnership - MS 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 - MS 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 Canada events, programs, or activities, defined by a written agreement with expectations of both parties.

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

Executive Team – The most senior level of staff leadership within MS Canada comprised of the president and chief executive officer; presidents; senior vice-president(s) and vice-president(s). One person may hold more than one position. The president and chief executive officer may alter the composition of the executive team as required from time-to-time.

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