

## CMA Policy Endorsement Guidelines (“Guidelines”)

CMA Board Approved March 2018

These Guidelines constitute an implementation tool of seven recommendations and are informed by [Guidelines for CMA’s Activities and Relationships with Other Parties](#) (aka CMA’s Corporate Relationships Policy) and [CMA’s Advertising and Sponsorship Policy](#).

### 1. Scope

These Guidelines apply to the Canadian Medical Association (and not to its subsidiaries). As these are Guidelines, exceptions may be necessary from time to time wherein staff may use their discretion and judgment.

### 2. Definition

Endorsement is an umbrella term encompassing “policy endorsement”, “sponsorship<sup>1</sup>” and “branding”.

*Policy endorsement* includes:

- (a) CMA considering upon request, non-pecuniary public approval, which may include the use of CMA’s name and/or logo, of an organization’s written policy, on an issue that aligns with CMA policy, where there is no immediate expectation of return; or,
- (b) CMA adopting the policy of another organization as our policy; or
- (c) CMA asking another organization to publicly support our policy.

### 3. Process

- (a) Criteria: For policy endorsement requests from another organization to endorse their policy<sup>2</sup> the following criteria shall be applied:
  - i) we have a policy on the subject-matter *and*
  - ii) we are actively working on advancing that policy position *and*
  - iii) the organization has a follow-up action plan associated with its request.
- (b) Approval: Where policy exists, approval requires a policy staff member (with portfolio responsibility) and the VP of Medical Professionalism, or the policy staff member (with portfolio responsibility) and the Chief Policy Advisor. Where no policy exists, approval of the Board of Directors is required.
- (c) Annual confirmation: Where CMA adopts the policy of another organization<sup>3</sup>, CMA staff shall confirm annually, or more frequently if circumstances dictate, that the policy has not been altered by the other organization.
- (d) Requests: Pursuit of personal endorsement requests are not appropriate. Wherever possible, requests should come from an organization and not an individual.

### 4. Results

- (a) Where CMA adopts the policy of another organization, the adopted policy shall become CMA policy, and will include a notation on the document as being an adopted policy of [organization].
- (b) All adopted policies will be housed in an accessible searchable database.
- (c) All requests by organizations for CMA to endorse their policy will be tracked in a central location, along with any response.

<sup>1</sup> Sponsorship means, to consider upon request, pecuniary public approval, which may include the use of CMA’s name and/or logo, of an organization’s event (eg., conference), on an issue that is supported by CMA policy or that promotes CMA brand awareness, where there is an immediate expectation of return.

<sup>2</sup> That is, part (a) of the definition in Section 2.

<sup>3</sup> That is, part (b) of the definition in Section 2.