

CMA Policy Endorsement Guidelines

<https://policybase.cma.ca/link/policy14021>

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Documents

 **Association of Canadian Medical Association**

CMA Policy Endorsement Guidelines ("Substitutes") **CMA Board Approved March 2018**

These Guidelines constitute an implementation tool of seven recommendations and are informed by [Guidelines to CMA's Structure and Relationship with Other Parties](#) (aka CMA's Corporate Relationship Policy) and [CMA's Authority as a Professional Body](#).

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 where a staff may use their discretion and judgment.

2. Definition
Endorsement is an umbrella term encompassing "policy endorsement", "sponsorship" and "lending".
Policy endorsement includes:
(a) CMA endorsing any public report, non-proprietary public opinion poll, which may include the use of CMA's name and/or logo, of an organization's written policy, or an issue that aligns with CMA policy, where there is no explicit repudiation of intent; 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 policy¹ (the following criteria shall be applied):
i. we have a policy on the subject matter and
ii. we are actively working on a document that policy position and
iii. the organization has a follow-up action plan associated with its request.
(b) Approval: Where policy needs 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 needs approval requires the Board of Directors to approve.
(c) Annual confirmation: Where CMA adopts the policy of another organization², CMA staff will confirm annually, or more frequently if circumstances dictate, that the policy has not been altered by the other organization.
(d) Requests: Pursuit of potential endorsement requests are not appropriate. If where 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 in the document as being an adopted policy of judgment.
(b) All adopted policies will be housed in an accessible online database.
(c) All requests for organizations for CMA to endorse their policy will be tracked in a central location, along with any responses.

¹ Requests must, in order to be eligible, meet the following criteria: (i) the organization has a follow-up action plan associated with its request; (ii) the organization has a policy on the subject matter; (iii) the organization is actively working on a document that policy position and; (iv) the organization has a follow-up action plan associated with its request.

² This is part of the definition of endorsement.

³ This is part of the definition of endorsement.

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