

HFMA Sponsorship Position Statement and Ethical Statement

The aim of this Policy is to state HFMA's intentions in offering an equitable market for vendors to market their services through HFMA activities. These guidelines will also help ensure that all HFMA executives, non-executives and volunteers take a consistent approach.

Also included is a set of Ethical Statements which set out our values in relation to the acceptance of sponsorship.

HFMA deals with highly sensitive and emotive issues. The level of sponsor involvement needs, therefore, to be treated with caution. Sponsors should not receive ownership rights or any form of endorsement or exclusivity and their support must always be seen as secondary to the aims of HFMA. Sponsors should operate within clearly defined parameters, and observe issues of propriety at all time.

The outline parameters for sponsor involvement in the HFMA are:

- Companies' support should be seen as adding significant benefit to an existing HFMA message, campaign or activity.
- There should be no overt commercial advantage to the sponsor or brands as a result of HFMA staff or volunteers involvement in facilitating their sponsor's participation.
- If the sponsorship involves participation with a charitable activity that project or activity should not be entirely dependent on sponsorship support for its funding.

For the avoidance of doubt these Statements apply not only to HFMA but to its subsidiary organisations HFMA LTD and HFMA Commercial Services Ltd.

Sponsorship Principles

1. Sponsorship support should only be considered where it would be likely to produce significant net benefit for the HFMA at no detriment to its reputation
2. Sponsorship support should add to, not replace core funding
3. Sponsorship should be sought in an open and even-handed manner from businesses competing in a particular field. A chosen sponsors competitors should not be given grounds to complain that they were not given a fair chance to participate
4. Sponsorship should be of activities or events, not of individual Executives, Non-Executives or volunteers of the Association, lest those individuals appear to be placed under an obligation to the sponsor
5. In general, acceptance of sponsorship should be tested against the general principle that it does not, and does not appear to, influence HFMA's charitable objectives and agenda set against achieving them or place HFMA under an obligation to any sponsor that goes beyond any agreements relating to the activity or event. Particular care needs to be taken when considering large amounts of individual sponsorship or repeat sponsorship

6. HFMA must act with, and must demonstrate impartiality, honesty and integrity when entering into a sponsorship agreement
7. HFMA must put procedures in place to ensure that sponsors do not receive returns that are greater than is proper and proportionate and that any sponsorship agreement is able to withstand Board of Trustee scrutiny. The HFMA will set out what benefit is reasonable for the sponsors to expect
8. Sponsorship should not dilute the HFMA's activities, campaigns or messages
9. The HFMA must not, and must not appear to, endorse the sponsoring company or its products
10. Sponsors should not have any input into, or expect to influence the messages of HFMA towards their business area
11. HFMA should examine rigorously whether:
 - Particular activities should be excluded from sponsorship; and
 - Particular types of company should be considered unsuitable as sponsors on the grounds of potential conflicts of interest or inappropriateness.

12. Organisations wishing to become a sponsor of any of HFMA's programmes of activity must satisfy the following minimum requirements:

- The products and services offered by the proposed sponsor must align appropriately with the context and content to which the activity is related. Businesses/organisations linked with products and services considered to be harmful to health will be rejected, e.g. tobacco and alcohol manufacturers and retailers, fast food outlets which do not operate or promote/advocate healthy eating, and organisations whose reputation may (in the sole view of HFMA officers) compromise that of NHS and HFMA values
- Be able to demonstrate sound financial status. HFMA Ltd will be responsible for checking the status of the organisations it proposes to use as a sponsor
- Have an acceptable reputation which befits the purpose and ethos of the work of the NHS and/or HFMA.

Where collaborative partnerships involve a pharmaceutical company then the proposed arrangements must comply fully with the Medicines (Advertising) Regulations Act 1994 (regulation 21 'Inducements and hospitality').

13. HFMA should determine whether the sponsor could bring adverse publicity to the activity or the HFMA.
14. Any association with a sponsoring company must not compromise the HFMA's responsibilities to its members
15. HFMA should select one or a number of its officials to be responsible for making sure that the guidance on sponsorship is known and is in use throughout the HFMA
16. Sponsorship of individual amounts of more than £18,000 must be disclosed in HFMA's Annual Reports. Guidance on handling the recording of "in-kind" sponsorship is set out below. Individual amounts of less than £18,000 need not be disclosed.
17. "In-kind" sponsorship is the provision of goods or services to support or enhance a campaign or other activity. To measure the value of "in-kind" sponsorship, HFMA should consider the opportunity cost, that is, how much it would have cost the HFMA if it had paid for the support provided.
18. All sponsorship agreements should be in writing.

19. The HFMA brand and logo (and that of its subsidiary organisations) is copyright protected and may not be used by a supporting organisation, except with the written consent of the Secretary (Chief Executive) of the Association.
20. All sponsors/exhibitors should be provided with HFMA's standard terms and conditions before committing to sponsored activity.
21. If sponsorship is sought from one of the Associations Corporate Partners, this approach should be levered through the Association's national Business Development Team
22. All sponsorship activities need to be reported to and invoiced through HFMA Ltd.
23. A commitment to providing and demonstrating 'value-for-money' for all sponsors needs to be adopted by all parts of the Association (including its Branches), no matter what the level of sponsorship.
24. Any person acting on behalf of the organisation should try to negotiate leverage with HFMA's Business Development Team in order to maximise knowledge and financial contribution.
25. All sponsorship arrangements need to be clearly documented with a detailed benefits list and sign off by both a member of HFMA and the client prior to that activity taking place.
26. Those involved in a sponsorship transaction within HFMA need to consider the effects of their involvements and the consequences of their work or its misuse on other parties. Participants should note that there are national laws and administrative regulations (for example Data Protection Acts, the Human Rights Act, copyright and libel laws) which may affect the conduct of their work, data dissemination and storage, publication, rights of sponsors and employers etc..
27. While recognising that training and skill are necessary to the delivery of transactions in relation to sponsorship, those involved should themselves recognise the boundaries of their professional competence. They should not accept work of a kind that they are not qualified to carry out. They should satisfy themselves that the work they undertake is worthwhile and that the value is commensurate with an appropriate level of effort and resource put into the transaction. They should be clear about the limits of their detachment from and involvement in the sponsoring organisations they are working with.
28. In their relations with the media, those involved in sponsorship transactions should have regard for the reputation of the discipline and refrain from offering expert commentaries in a form that would appear to give credence to material that they would regard as comprising inadequate or tendentious claims.
29. Those taking part in a sponsorship transaction should be aware that they have some responsibility for the use to which the information they are privileged is to be used and disseminated. Discharging that responsibility may on occasion be difficult, especially in situations of competing interests or where there is unanticipated misuse of the information by third parties.
30. Where possible, threats to the confidentiality of commercially sensitive information should be anticipated by participants.
31. Appropriate measures should be taken to store sensitive information in a secure manner. Participants should have regard to their obligations under the Data Protection Acts. Where appropriate and practicable, methods for preserving confidentiality should be used.
32. Guarantees of confidentiality and anonymity given to sponsoring organisations must be honoured, unless there are clear and overriding reasons to do otherwise. Other people, such as colleagues given access to information must also be made aware of their obligations in this respect.
33. Commercially sensitive information given in confidence does not enjoy legal privilege.
34. Participants should take special care when carrying out sponsorship activity via the Internet. Ethical standards for internet advertising are not well developed as yet. Care must be taken as eliciting informed consent; negotiating access agreements, assessing the boundaries between the public and the private, and ensuring the security of data transmissions are all problematic in Internet research. These need to conform to internal recommended practice and nominated Data protection 'Champion' within the organisation.

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For detailed guidance on securing sponsorship call HFMA Business Development Team on 0117 929 4789.