Policy 3.15
Cause-Related Marketing and Community Hosted Events

Responsible Official: VP for Development & University Relations
Administering Division/Department: Development & University Relations
Effective Date: August 27, 2018
Last Revision: September 05, 2018

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Overview

Emory appreciates community supporters who wish to build awareness and generate philanthropic support for Emory’s mission through Cause-Related Marketing Programs or the selection of Emory as a beneficiary of Community Hosted Events. As a general rule, these activities must be approved in advance by Emory and should promote an activity/product/service that is beneficial to the consumer; support the mission and values of Emory; adhere to Emory branding identity and standards; have a positive impact on Emory’s reputation; and generate sufficient revenue to justify the commitment of Emory resources.

This policy details the parameters under which Emory University and its affiliated organizations will evaluate opportunities and the process for approval of Cause-Related Marketing Programs and Community Hosted Events.

Policy Details

Emory and AAE will participate in, and accept proceeds from, Cause-Related Marketing Programs and Community Hosted Events when the organization and program complement and support Emory’s mission and objectives, and when the effort promotes a positive image of Emory. Emory will decline participation in any activities sponsored by the tobacco and firearms industries, or anything that would compromise Emory’s 501 (c)(3) status. All other opportunities will be evaluated on a case-by-case basis, with Emory reserving the right to deny any request for Emory’s participation in a Cause-Related Marketing Program or as the beneficiary of a Community Hosted Event. Emory also reserves the right to terminate any Cause-Related Marketing Program or Community Hosted Event relationship at any time and for any reason.

Emory University is unable to provide the following for an approved Cause-Related Marketing Program or a Community Hosted Event:

- Mailing/email lists of donors or vendors, or in-house mailing/emailing on behalf of the event/initiative
- “Endorsement” of any product or service
- Emory’s sales tax exemption for activity-related purchases
- Gift recognition letters to individual contributors noting a charitable donation
- Gift receipt for the proceeds of a Cause-Related Marketing Program
- Insurance or liability coverage
- Funding or reimbursement for expenses
• Staff support (e.g., event organizing, recruiting of event sponsors/participants)
• Distribution of promotional materials throughout Emory University
• Public relations support
• Solicitation of sponsorships for third-party events/initiatives
• Access to Emory online registration tools

* Exceptions to these restrictions may be made on a case-by-case basis, dependent upon the financial commitment being offered by the Cause-Related Marketing Program or Community Hosted Event and/or the resources available from individual AAE offices.

Cause-Related Marketing Program Requirements

Cause-Related Marketing Programs benefitting Emory or a unit of Emory must be approved in advance by the Office of Advancement and Alumni Engagement to ensure there are no conflicts of interest with Emory or with Emory’s mission, vision, or values. Organizations must submit a Cause-Related Marketing Program Application with supporting materials at least sixty(60) days prior to the date on which they wish to begin their marketing campaign that supports Emory.

A complete marketing and publicity plan must be submitted with the Cause-Related Marketing Program Application, outlining how the Emory name, brand, and logo will be used. All promotional materials (e.g., invitations, ads, fliers, brochures) must be approved by an Emory representative before Emory’s name, brand, or logo is used. Use of Emory’s name, brand, and logo will only be approved for use by a third party for a specific amount of time and for a specific purposes.

The Cause-Related Marketing Program Application must also include an estimate of the amount Emory will receive from the program. One hundred percent of net proceeds must be provided to Emory, the minimum commitment must be $10,000, and the proceeds must be delivered to Emory no later than six weeks from the conclusion of the program. Emory will consider being a joint beneficiary of Cause-Related Marketing Programs if the initiative warrants, depending upon the proposed other charity and the proposed allocation of the proceeds. For ongoing programs, Emory and the organization shall come to an agreement regarding regularly scheduled disbursements of proceeds. These proceeds are not considered a philanthropic donation to Emory; no gift receipt for tax purposes will be issued.

As a non-profit organization, Emory does not sell or endorse products or services provided by other organizations. Sales-driven fundraising projects or projects that imply endorsement or promotion of a single product or service will not be approved.

Representatives of Emory will decline a Cause-Related Marketing Program Application if:

- The program also benefits other organizations that compete or conflict with Emory’s mission or values;
- the program would potentially conflict with existing Emory philanthropic relationships;
- the program would conflict with an existing marketing or public relations campaign;
- entering into a relationship constitutes a real or perceived conflict of interest for Emory;
- the program asks for the use of names and/or stories of Emory patients for use in promotion;
- the program fails to comply with any municipal, county, state, and/or federal law;
- the program involves promotion of a political party, candidate, or appears to endorse a political issue;
- the program would require any source of funding from Emory; or
- any other reason as determined from time to time by Emory.

Specific details regarding Emory’s participation in Cause-Related Marketing Programs are outlined in the Emory Cause-Related Marketing Program Guidelines.

Community Hosted Events Requirements

Community Hosted Events and projects benefitting Emory must be approved and sanctioned by AAE in advance of the event, and approved every year thereafter to repeat an event in a succeeding year. These events must also be financially self-sustaining without contribution from or financial risk to Emory. The donation resulting from the Community Hosted Event must be sent in one check to Emory within 60 days of the completion of the event. Requests by the organizer for Emory Speaking and Event Representation may be submitted by completing a Representative Request Form. Specific requirements regarding Community Hosted Events to benefit Emory are detailed in the Emory Community Hosted Event Guidelines and Policies.

Definitions

Cause-Related Marketing Program – Any advertising or sales campaign conducted by an external organization involving a representation that the purchase or use of goods or services offered by that external organization will benefit Emory. A Cause-Related Marketing Program may include point of purchase/cash register roundup efforts. Cause-Related Marketing is not a sponsorship agreement or an endorsement by Emory of an organization or their produ
Purpose of this policy is to establish the University's guidelines for cause-related marketing and how these activities align with Emory's mission.

**Cause-Related Affinity Program** - Any program whereby a retailer offers an opportunity for its customers to direct a percentage of their purchases at that retailer to a nonprofit organization (e.g., AmazonSmile, Imyn). (Please see AAE Cause-Related Affinity Program Policy).

**Community Hosted Events** - Any event or activity that will be promoted by any faculty or staff member, student, alumnus/a, community member or organization, both internal and external, to benefit Emory – or any of its affiliated institutions, departments or divisions – that is not tied to the purchase of goods or services and that is not directly coordinated by the Office of Advancement and Alumni Engagement (AAE) or any official volunteer leadership group managed by a AAE office. (e.g., Emory Alumni Board, CEBA, GALA)

**Special Constituencies** - For purposes of this policy, special constituencies include Emory faculty/staff, students, alumni, neighboring communities, and Emory Board of Trustees members.

**Related Links**

- Current Version of This Policy: [http://policies.emory.edu/3.15](http://policies.emory.edu/3.15)

**Forms and Attachments**

Cause related marketing guidelines and application: [download](#)

**Contact Information**

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<thead>
<tr>
<th>Subject</th>
<th>Contact</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarification of Policy</td>
<td>Julie Earnhart</td>
<td>404-727-2055</td>
<td><a href="mailto:julie.earnhart@emory.edu">julie.earnhart@emory.edu</a></td>
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</tbody>
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**Revision History**

No previous versions of this policy were found.

Emory University policies are subject to change at any time. If you are reading this policy in paper or PDF format, you are strongly encouraged to visit [policies.emory.edu](http://policies.emory.edu) to ensure that you are relying on the current version.