



HEALTHIER WORKPLACES | A HEALTHIER WORLD

Strategic Relationships

Approved January 2005; Revised April 2022

Overview

The purpose of this document is to distinguish the primary types of relationships in which AIHA is likely to engage, including definitions and standard response procedures.

Definitions

Co-sponsorship: A co-sponsorship represents a formal agreement between two or more organizations to support an event. Dependent upon the nature of the co-sponsorship, this relationship offers a wide range of support levels and mutually beneficial opportunities. One organization or entity will usually own the event, handle all staffing, and resource requirements, and be responsible for all expenses related to the event. The co-sponsor will generally license its name and logo to the event for marketing purposes (AIHA has a legal counsel-prepared license agreement for this purpose). Additionally, the co-sponsoring organization may provide other support such as funding, staffing, marketing, or facilities.

Because of the strategic implications attached to co-sponsorships, a separate set of guidelines exists for this level of collaboration (see [Standard Procedures for Co-sponsorships](#)).

Partnership: A partnership represents an agreement (often legally binding) between two or more organizations to accomplish an activity, such as holding an event, developing and/or distributing a specific product, or implementing a specific service. Partnerships almost always involve resource utilization and therefore expense. The partners usually share expenses equally, but allocation by formula (membership size, budget size, etc.) is also common. Because of the budget and strategic implications attached to partnerships, a set of guidelines exists for them (see [Standard Procedures for the Establishment of a Partnership or Alliance](#)).

Alliance: An alliance can represent either a formal or an informal agreement between two or more organizations to jointly support an ongoing common cause or purpose that is generally beyond the scope of capability of any one of the participants. Coalitions are a type of alliance often used in government relations. The costs, if any, related to the alliance are generally, but not always, borne equally by the individual participating organizations. Because of the budget and strategic implications attached to alliances, a set of procedures exists for them (see [Standard Procedures for the Establishment of a Partnership or Alliance](#)).

Standard Procedures for Co-sponsorships

Requests for co-sponsorships generally reach AIHA through the volunteer groups involved with or related to the event in question. Regardless of origin, the same procedures are to be followed.

- 1) Upon receipt, staff researches the event and sponsoring organization, and submits recommendations to the CEO. The primary criteria at this level of evaluation are:
 - a) The intended outcomes of the event must be in harmony with the mission and vision of the AIHA.
 - b) The focus of the event must be a subject of recognized interest to AIHA members. If the co-sponsorship request has not come through the volunteer group (VG), appropriate VGs are to become involved at this point.
 - c) The event either supports or has no apparent conflict with the Member Ethical Principles.
 - d) The event represents no contractual or legal obligation to AIHA.
 - e) Preferably, the event is resource and revenue positive or neutral for AIHA.
- 2) The CEO submits the request before the staff directors for reaction and input, asking for feedback on the proposed co-sponsorship and recommendations for in-kind support requests. The primary criteria at this level of evaluation are:
 - a) The event either supports or does not represent an apparent conflict with AIHA's government relations goals.
 - b) The event does not represent significant competition with AIHA-sponsored events.
 - c) The requirements of co-sponsorship are appropriate and acceptable.

The following levels should be considered guidelines and do not represent mandatory commitments. **Strategic flexibility** is deemed a necessary component of reacting to different events and opportunities. With an emphasis on **Return On Investment**, all requests for co-sponsorship will be segmented by audience size for the determination of sponsor and co-sponsor obligations (unless the event warrants another approach). **Audience size** will be based on the previous year's attendance at the event in question or will be estimated.

There are three levels of co-sponsorship:

Level One: Up to 250 attendees

- AIHA provides: web link, Synergist calendar listing, e-newsletter listing.
- Sponsor provides: web link, post-show attendee labels, on-site promo opportunity, one free event registration.

Level Two: 250 – 500 attendees

- AIHA provides: level-one items + ad hoc mailing labels (related committees and/or regional members).
- Sponsor provides: level-one items + second free event registration

Level Three: > 500 attendees

- AIHA provides: level-two items + Synergist ad if time allows, mailing labels for the full membership.
 - Sponsor provides: level-two items + free exhibit space, opportunity to develop or co-develop event products (proceedings) and share in profits.
- 3) The CEO (or as delegated to the Managing Director, Global Meetings) submits a formal request to the President that includes the following: event background, previous co-sponsorships, technical committee endorsements, issues and concerns, benefits of co-sponsorship, and a staff recommendation (in support of and/or in opposition to the request).
 - 4) Although the President has the full authority to approve or disapprove of event co-sponsorships, the President may poll either the Executive Committee or the full Board prior to making a final decision.
 - 5) The CEO (or as delegated to the Managing Director, Global Meetings) formally apprises the requestor whether co-sponsorship has been granted. The requestor will be provided with AIHA's standard license agreement which formally licenses AIHA's name and trademarks to the event in question for express use with that event. The agreement also outlines the terms of the co-sponsorship and AIHA indemnification with respect to any and all claims, losses, damages, liabilities, judgments, or settlements as a result of any activities conducted by the licensee pursuant to the agreement. Appropriate VGs and staff are copied on the correspondence.
 - 6) The CEO completes this process by apprising the Board of the co-sponsorship in the next scheduled Board Update or another acceptable communication tool.

Standard Procedures for the Establishment of a Partnership or Alliance

- 1) Upon receipt of requests for partnerships or alliances, the CEO submits the request to the staff directors for feedback. Appropriate members of the staff are assigned to research aspects of the request and volunteer groups or other entities are involved as appropriate. A recommendation is produced based on the following criteria:
 - a) The intended outcomes of the collaboration must be in harmony with the mission and vision of the AIHA.
 - b) Preferably, the collaboration enhances the AIHA brand.
 - c) The focus of the collaboration must be on a subject of recognized interest to AIHA members.
 - d) The collaboration either supports or has no apparent conflict with the Member Ethical Principles.
 - e) Preferably, the collaboration is revenue and membership positive or neutral for AIHA.
 - f) The collaboration either supports or has no apparent conflict with the AIHA's government relations goals.
 - g) The collaboration does not represent significant competition with AIHA-sponsored events or activity.
 - h) The requirements of collaboration are appropriate and acceptable.
- 2) Dependent upon the gravity of the proposed collaboration, the CEO may contact legal counsel for input and recommendations.

- 3) If the level of engagement carries little to no cost, the CEO has the authority to make the decision autonomously. The President (and full Board at a subsequent meeting) are then apprised.
- 4) If the level of engagement carries a relatively significant investment, the CEO then submits to the President a recommendation in support of and/or in opposition to the request.
- 5) In either case, the CEO or appropriate other staff member then formally informs the counterpart organization whether collaboration has been approved.
- 6) To the degree appropriate, a formal agreement (e.g., Memorandum of Understanding), is executed between the collaborating partners.
- 7) All new collaborative agreements require an **AIHA MOU Evaluation Scorecard** to be filled out (see [Attachment A](#)).
- 8) All MOUs are required to be reviewed every 5 years using the criteria above the [MOU Evaluation Scorecard](#) (Attachment A).
- 9) The CEO or appropriate other staff then apprises the Board of the collaboration for formal approval.

Attachment A

AIHA Memorandum of Understanding Recommended Criteria & Scorecard

The individual tasked with researching and evaluating an MOU should complete the scorecard to the best of her/his ability and present it to the AIHA CEO for approval with final approval by the Board President/Board.

Criteria

1. **Synergy with AIHA Mission and Priorities:** Will this partnership support AIHA's mission and goals? Will it increase the value of AIHA within the profession and strengthen AIHA's reputation? Do the goals of this partnership align with the strategic goals of AIHA? Are there mutual benefits to both organizations?
2. **One of AIHA's Target Markets:** Is the partner U.S.-based or located within one of the countries targeted by AIHA? Does AIHA have an existing relationship with the organization?
3. **Sizeable Market:** Is there a significant number of members or potential members within the partnering organization that want or value AIHA's products/services?
4. **Member Benefit and Reach:** Will this partnership extend AIHA's reach and presence domestically and/or internationally? Will AIHA increase membership as a result of this partnership? Will this partnership help AIHA members and potential members gain access to the association's professional development and education and training programs at the local level? Will this partnership help to foster community development and a greater Return on Engagement (ROE) among its members?
5. **Expansion of AIHA's Products/Services:** Will this partnership provide the opportunity to sell more of AIHA's products or services? Will this partnership leverage or reuse an already existing product/service? Will AIHA need to modify its products/services to succeed with this partnership?
6. **Financial Return:** Will this partnership contribute to AIHA's bottom line and provide an acceptable Return on Investment?
7. **Resource Investment:** Does AIHA have the staff capacity and financial resources to launch, manage and ensure the success of this partnership? Has AIHA determined and weighed the staff time and financial costs vis-a-vis potential revenue opportunities of selling its product/services?
8. **Language and Cultural Compatibility:** Do the leaders of this partnering organization feel comfortable doing business in English? Will there be cultural and communication differences that will require particular staff expertise for handling potential challenges?

9. **Infrastructure:** Does the partner have the infrastructure (i.e., marketing expertise, distribution channels) and the viability to enter into a partnership? Will the partner be able to fulfill financial obligations of the partnership?
10. **Purchasing Power:** Do members or potential members have the money to purchase AIHA's product and services?
11. **Long-term Sustainability:** Will this partnership be sustainable long-term?
12. **Impact to AIHA's Reputation and Brand:** Will this partnership help to bolster or damage AIHA's reputation in the profession and its recognized brand around the world? What is this potential partner's reputation among its peers, clients, and members?
13. **Alignment with other Entities:** Does this partner have any actual or perceived alignment with other entities (e.g., government, association, or party) that may create a polarizing or controversial response for AIHA?
14. **Public Relations Issues:** Does this partner have any negative public relations issues in its past, currently or in the foreseeable future that could impact the credibility and success of a partnership with AIHA?
15. **Accreditation, Licenses, Registration Issues:** Does AIHA have any issues or concerns with the accreditation, licenses and/or registrations this partner offers?
16. **Compliance with Applicable Standards, Regulations and Laws:** Is this partner in compliance with all applicable standards, regulations, and laws for the programs or credentials it produces within its own country? (Ask AIHA staff for clarification)

Questions to Evaluate a Partner's Product or Service

1. Does this product or service enhance or aid in implementing an existing AIHA product or service?
2. Is this product or service relevant to existing AIHA publications, standards, or guidelines?
3. Is it useful in implementing or assisting users in the application of an AIHA practice standard, guideline, or strategy?
4. Does this product or service fully reflect the technical content of pertinent existing practice standards, guidelines, strategies, or positions?
5. Is this product or service free of key technical gaps, logic gaps, or similar deficiencies?
6. Is it in any conflict with any current AIHA practice standard, guideline, strategy or position, products or services under development, or any AIHA strategic initiative?
7. Does this product or service result in any legal liability for AIHA?
8. Does it further AIHA's mission, goals, or objectives?

Characteristics of Successful Partnerships

- Joint planning, experience working together, and joint evaluation
- Recognition of the strengths, weaknesses and differences, and similarities of all sides
- Proactive communication that ensures participants are talking about the same thing
- Time and space for feedback, disclosure, and discussion of the participants' communication process
- Ability to both participate in and observe the relationship to ensure a high degree of awareness, on-going learning, and regular adjustments as needed
- Clarity regarding sustainable levels of partnership activity
- Strong mutual interest and compatible goals

MOU Partner Organization Recommendation Form

Date: _____ MOU Partner Organization's Name: _____

Organizational Profile (brief description): _____

Scale – Based on your knowledge and opinion, rate how positively or negatively the Organization fits into AIHA's criteria [+1 (positive); 0 (neutral); -1 (negative)]. A rating of at least +6 is recommended, although other extenuating factors may be considered to support the MOU.

I. Mission Alignment

- a. _____ Aligns with AIHA mission/vision, including advocacy positions
- b. _____ Enhances AIHA Brand
- c. _____ Focused on IH/OH interests

II. Growth Potential/Success Factors

- a. _____ Has potential to increase AIHA revenues
- b. _____ Has potential to increase AIHA membership/meeting attendance
- c. _____ Increases our competency and IH/OH/EHS knowledge

III. Operational Match

- a. _____ Fiscally sound, well-managed
- b. _____ Fair and equitable exchange of deliverables
- c. _____ Good reputation/leader in its area of expertise

Total Score: _____ (Recommended minimum of +6)

Summary of Proposed Deliverables:

From MOU Partner:

From AIHA:

Recommendation: Yes _____ No _____

Comments supporting the MOU (e.g., list potential for new revenue, membership growth, access to new products and/or services)

Recommended By:

Name/Signature

Date

Approved By:

AIHA CEO Name/Signature

Date

Approved By:

AIHA President Name/Signature

Date