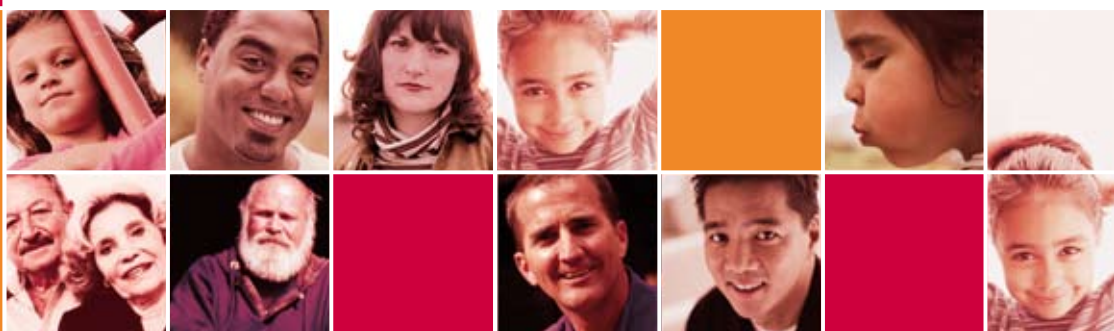


Voluntary Checklist for Health Consumer Organisations Considering Health Industry Sponsorship



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Acknowledgement

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Introduction

In 2005, the Consumer Advisory Committee conducted a survey on health industry sponsorship of health consumer organisations in New Zealand. Most of the groups who responded indicated they had some sort of policy for managing the support they received from health industry groups. The majority of respondents supported the development of a voluntary checklist on health industry sponsorship of consumer groups.

The Consumer Advisory Committee consulted on the draft text of a Voluntary Checklist in 2008. The suggestion was made that the scope of the Voluntary Checklist be broadened to include all possible sponsorship arrangements, whether with health industry, Government, or other sponsors.

It was not possible to expand the scope of the Voluntary Checklist beyond that which was consulted on, however, the checklist could prove useful for organisations considering other funding arrangements.

This Voluntary Checklist includes a set of guiding principles and a checklist of questions to think about when entering into health industry sponsorship.

Guiding principles if considering health industry sponsorship

Benefit

- The Health Consumer Organisation gains from the relationship as well as contributing to it.

Independence

- The Health Consumer Organisation retains control over its own governance, policies, practices and decision making.
- There is no expectation that the Health Consumer Organisation will promote the products or interests of the sponsor, nor is preferential treatment expected.
- The Health Consumer Organisation retains the right to express independent views about the sponsor company or its products if this is in the best interest of their health consumer constituents.
- The Health Consumer Organisation maintains the right to have an opinion that is different to that of the sponsor.

Integrity

- The relationship is based on sound moral principles, trust, and honesty.
- The relationship is able to withstand public and professional scrutiny.

Transparency and openness

- The objectives, roles, responsibilities and rules of the relationship are clear to everyone at the outset.
- The nature and extent of the relationship is made known to constituents and the outside world.

Building sustainability

- The partnership may build the long term capacity and strength of the Health Consumer Organisation.

Equitable relationship

- There is mutual respect between the Health Consumer Organisation and health industry group (parties).
- Resources may be provided to allow small organisations to confidently contribute to and maintain an effective relationship.
- Parties give on-going attention to building the relationship.

Acknowledgement

- The contributions that all parties make are specified and acknowledged.

Checklist of questions to consider

Each relationship between a Health Consumer Organisation and a health industry company will differ, so the same approach may not work for all of them. The following checklist highlights questions that are often important to consider when determining Health Consumer Organisation and health industry relationships.

Deciding whether to enter into a relationship

- What are our goals?
- What are the goals of the other party?
- What objectives do we have in common?
- What will we each do to achieve agreed objectives?
- Is this relationship consistent with our overall organisational goals?
- Will any funding arrangement be perceived as appropriate?
- Who will own the products of the relationship?
- How will we measure the results of the relationship?
- Have we considered the sustainability of the project?
- What will we do to ensure our independence?
- What is the best department of the health industry company to work with?
- What acknowledgement or endorsement does the health industry company expect?
- Do we have the required resources to achieve the goals of the relationship?
- Have we considered the benefits and risks of the specific type of funding or sponsorship?
- If the funding for the relationship ceases, what impact will it have on the sustainability of the organisation?
- What are the risks of entering into the relationship?

Formalising the relationship

- How will we record our arrangement? (for example, a contract, a statement of agreement, an exchange of letters, an invoice or a verbal agreement)
- Who will have the authority to make decisions for our organisation?
- Have we agreed on a process for conflict resolution?
- Have we agreed on an evaluation methodology?



Making the relationship work

- How will we support the relationship/project?
- What will we need to contribute? (for example, time, people, funds, information, other resources)
- What do we want the other party to contribute?
- What, if anything else, does the other party expect from us?
- Who will be the main points of contact in each organisation?
- What is the overall timetable of activities?
- How will contributions be acknowledged?
- How will confidential and private information be kept secure?
- Have we agreed what information will be private and what will be public or shared?
- How will we keep stakeholders, including our members, informed of our work?
- How will we provide our members with the opportunity to participate in any evaluation of the relationship?
- How will we evaluate the success of the relationship?
- How will we ensure that intellectual property is protected?
- How will we manage any changes in the company that may alter the relationship and compromise the consumer organisation (e.g. a change of ownership; new activity or product of the company)?

Concluding the relationship

- How long is the relationship intended to last?
- How will we check whether our objectives have been met?
- If we need to conclude early, how will the relationship be managed?
- If there are ongoing activities, how will these be managed?

Evaluating outcomes of the relationship

- Were the goals achieved?
- Were we treated fairly?
- Was the investment of time, resources and people worthwhile?
- If the opportunity arose would we be willing to work together again?
- Were there any unintended outcomes?
- What were the lessons learned?

Being transparent about the relationship

- How will we consult our members about entering the relationship?
- How will we inform our members and the public of this relationship, the extent of funding and purposes to which this will be put?
- How will we provide opportunities for our members and the public to provide feedback on the relationship?

Other Resources

Consumers Health Forum of Australia <http://www.chf.org.au>

Consumer Focus 'Guidelines on Commercial Sponsorship'

http://www.consumerfocus.org.uk/en/content/cms/News___Press/New_guidelines_on_co/New_guidelines_on_co.aspx

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