

APPROVED BY BOARD OF DIRECTORS ON NOVEMBER 9, 2023

ORS PARTNERSHIPS/ALLIANCES

OVERVIEW

To pursue the purpose and the mission of the ORS as defined in the ORS Bylaws, the ORS Board of Directors has adopted the procedures, criteria, and guidelines as set out below that outline the ways in which ORS will partner with other organizations in the field of musculoskeletal research, whether basic, translational, or clinical in nature.

ORS values the exchange of science and education in the form of organized meetings/workshops and therefore will consider partnering with other organizations that offer **high scientific content and educational quality with limited commercial bias** that would benefit the orthopaedic and related scientific communities. The maximum length of a partnership is three (3) years, at which point the partnership may be reviewed for possible reapproval for another three year term.

TYPES OF PARTNERSHIPS

Partnerships may relate, but need not be limited to, conferences, meetings, courses, training events and programs, working groups, and publications. Four types or categories of partnership that may include these or other types of activities have been identified:

- TYPE I: Endorsement**
- TYPE II: ORS Branded / Co-Branded Scientific Session**
- TYPE III: ORS Co-Branded (or Jointly Sponsored) Meeting / Conference**
- TYPE IV: Corporate Alliance**

In general, considerations for partnerships/alliances include the following:

Alignment of Mission:

Ensure the aims of the proposed activity, and of the responsible body, are aligned with the mission of the ORS.

Quality:

Partner on high quality activities that have an international, national, or regional impact, and are governed by and follow scientific, personnel and financial standards, policies, and procedures that align with those of the ORS.

Policy:

Ensure the requested partnership does not breach any point of the ORS conflict of interest policy

or guidelines.

Program Diversification

Ensure balance and diversification are maintained when considering programs for future partnerships including, but not limited to, disciplines and topics.

Protect the ORS Brand:

Monitor the number and quality of partnerships annually to ensure that the ORS brand is not diluted or jeopardized.

Publicity:

Consider the publicity that an ORS partnership is likely to generate. For example, an endorsement resulting in publicity that has the potential to harm the reputation of the ORS will likely not be approved.

Competition:

Ensure minimal overlap or competition with ORS meetings or those of other existing partner organizations, such as ASBMR, ICORS, AAOS; minimize competition with publications including JOR, JOR Spine, and any publications arising from ORS meetings.

Resources:

Ensure the ORS has the resources including staff and finances to support the partnership.

Commercialization:

Ensure that for any partnership meeting, any influence of sponsors on meeting program, content, or speakers aligns with recognized and public exhibitor agreements.

Accessibility:

Guarantee that the organizers of meetings and other educational activities for which ORS partnership is sought are committed to making their programs accessible to all who wish to participate, and will abide by the ORS policies on discrimination, equity, inclusion, and accessibility.

Mutual Agreement:

Ensure full understanding of the commitment by all parties, typically via an agreement or memorandum of understanding.

Approval:

All proposals for partnerships and endorsements will be sent to the CEO and as necessary, reviewed by the Collaborations Assessment Committee. Following an initial assessment and positive determination, all proposals will be reviewed and approved by the ORS Executive Committee.

TYPE I: Endorsement

Endorsements are expressions of support that may serve the Society's best interests and its members, because the aims of the activities or organizations to be endorsed are aligned with the aims and purposes of the ORS. As such, endorsements may be sought for such activities and organizations. The scope and type of endorsement requested will be included in the proposal submitted to the ORS CEO and should include clear explanations of the use of the ORS brand. All requests must be presented on the approved request form.

Considerations for securing an endorsement partnership are as follows:

1. Not-for-profit groups or organizations may seek endorsements.
2. Except in exceptional circumstances (such as endorsement of an event with fundraising for not-for-profit charitable purposes) no application for endorsement will be accepted from for-profit groups or organizations, by political parties and related interest groups, or by organizations or groups whose endorsement might contravene the ORS's non-profit purposes, as defined in its Articles of Incorporation and Bylaws.
3. Endorsements will not be given to organizations or activities for which this partnership would create conflict with the ORS commercial sponsorship policies.
4. The organization seeking endorsement must submit a formal request to the ORS.
5. A request for endorsement will not be considered if financial support is requested from the ORS.
6. For situations in which full endorsement is not deemed appropriate, an expression of support may be offered that entails the setting of specific conditions or limitations. *For example, use of the ORS logo may not be approved.*
7. When approved, endorsement usually will be for specific articles, events or activities that are by definition time-limited. However, consideration will be given for longer periods up to three years, after which the endorsement will automatically lapse and renewal must be sought.
8. ORS will prepare a memorandum of understanding (MOU) for each partnership that will detail the endorsement statement, license agreement for ORS logo usage, promotions, etc.
9. The item for which endorsement is requested should be relevant to the place in which the ORS endorsement will appear. *For example, if a scientific meeting is proposed for endorsement, the ORS logo may appear on the meeting's advertising and course materials, but on an unrelated part of the promoter's website homepage, the workshop's sponsors' materials, or other unrelated material, without explicit permission.*
10. The positioning of the ORS endorsement in relation to other logos, brand or company names, photographs, etc. should not infer any implied additional endorsement. *For example, if the ORS logo were to be placed next to the name of a for-profit pharmaceutical company the request would be rejected.*

TYPE II: ORS Branded / Co-Branded Scientific Session

ORS may brand or co-brand scientific sessions to promote interdisciplinary research, communication, cooperation, and education as they relate to orthopaedic research including basic, translational, and clinical research. This situation typically results from a partner organization requesting that an ORS branded session be presented at their meeting or conference, or that the ORS help with the development of aspects of the scientific program.

Considerations for securing a partnership for an ORS branded / co-branded scientific session are as follows:

1. Not-for-profit groups or organizations may seek session branding/co-branding partnership.
2. Except in exceptional circumstances (such as co-branding of a scientific session within an event fundraising for not-for-profit or charitable purposes) no application for co-branding will be accepted from for-profit groups or organizations, by political parties and related interest groups, or by organizations or groups whose endorsement might contravene the Society's non-profit purposes, as defined in its Articles of Incorporation.
3. The organization seeking ORS branding / co-branding must submit a formal request to the ORS.
4. ORS will prepare a memorandum of understanding (MOU) for each partnership that will detail the commitments of either party in a clear and concise manner to ensure full understanding of the commitment.
5. ORS will provide administrative support in regard to ORS branded or co-branded sessions to include, but not limited to: faculty invitations, confirmations, faculty disclosures, and session agenda. All details will be defined in the partnership agreement.
6. Speakers selected to represent the ORS will represent the diversity of ORS in terms of research specialty (bioengineering, clinical research), gender, and under-represented backgrounds.
7. Each speaker selected to represent the ORS must be a member in good standing of the ORS and be recognized as an expert in their area of interest.

TYPE III: ORS Co-Branded (or Jointly Sponsored) Meeting / Conference

Co-branding or joint sponsorship of a meeting or conference with a partner organization will allow both partners to work together to promote discussion between investigators in the specific field of musculoskeletal research through co-developing the technical program including the selection of top experts to share their knowledge with attendees.

Considerations for securing a partnership for an ORS co-branded / jointly sponsored meeting or conference are as follows:

1. Not-for-profit groups or organizations may seek co-branding or joint sponsorship.
2. Except in extenuating circumstances (such as co-sponsorship of a fundraising event for not-for-profit or charitable purposes) no application for endorsement will be accepted from for-profit groups or organizations, by political parties and related interest groups, or by organizations or

groups whose endorsement might contravene the Society's non-profit purposes, as defined in its Articles of Incorporation.

3. The organization seeking ORS co-branding / joint sponsorship must submit a request as described above under "approval" for consideration.

Unlike a Type I or II partnership, a request for co-branded or joint sponsorship will require the following:

1. A business plan and budget must be provided that also will include required resources from each sponsoring organization (including the ORS).
2. Co-organizers of the proposed meeting must include a member(s) in good-standing of the ORS.
3. All the commitments of each party need to be specified in a clear and concise manner to ensure full understanding of the commitment.
4. An agreement will be developed and signed by all parties. The agreement shall include the program timeline, dates of the meeting, responsibilities of both parties regarding program development, finances, marketing, administrative tasks, staff commitment, registration, publication of outcomes of the meeting, logo usage, etc.

ORS requests program organizers of the meeting/conference cooperate in the following ways:

- Ensure that ORS membership is promoted at the meeting (ORS tabletop display, membership applications, etc.)
- Permit the showing of intermission slides about upcoming ORS programs and activities
- Provide a final report about the event, including a list of attendees
- Include ORS information in the on-site registration materials
- Feature the name and logo of ORS appropriately on all publications (including digital media) for the meeting (copies of all publications must be submitted to the CEO for approval prior to use)

TYPE IV: Corporate Alliance

The Society enters corporate alliances to:

- Increase the dissemination of scientific, medical and health information and education;
- Help develop, produce and implement Society mission-related programs, materials and activities;
- Provide new means of raising funds and increasing public awareness for the Society's mission-related activities;
- Increase the overall capacity of the ORS to fulfill its mission.

In accepting donations from corporations with vested interests in how the public regards their products, the Society is determined to avoid conflict of interest, or even its appearance.

Therefore, the Society enters corporate alliances thoughtfully, with careful consideration given to the possible unintended effects, especially regarding the organization's public trust.

GUIDING PRINCIPLES FOR CORPORATE RELATIONSHIPS

Mission-related benefit:

The ORS will solicit and accept support only for projects and activities that are consistent with the ORS mission. The ORS will not engage in any corporate alliances that conflict with the mission of the Society or jeopardize the Society's tax-exempt status.

Independence:

The ORS will always exercise independent judgment in its decision-making and shall always maintain an independent position on issues affecting the welfare of its constituencies. The potential effect of such positions on the commercial interests of a funding source shall not be a relevant factor in the ORS decision-making process.

Consumer Communications:

Materials distributed from the ORS directed to the public or members will contain terms or statements such that a reasonable individual will understand the nature and extent of the corporate relationship.

Endorsement:

The ORS will not endorse any products, devices, or services.

Intellectual Property:

Any use of the Society's name, logo and identifying marks in the context of a corporate alliance (e.g. a corporate funded program or activity) must be reviewed and approved by the Society in writing in advance of their use. The use of a name/logo and identifying marks should be specific as to usage for up to three (3) years. Terms for license and use must be spelled out in a contractual agreement that should be reviewed by counsel. Upon expiration or termination of the agreement the corporation must immediately cease to use all licensed intellectual property and must return it to the ORS.

Written agreement:

When corporate support is restricted to a specific program or activity, a written agreement between the Society and corporation will be in place prior to implementation of the corporate relationship.