

## World Vision Cause Marketing Guidelines

Cause marketing (or a commercial co-venture) is a marketing partnership between a company and a nonprofit organization that raises money for the nonprofit organization while promoting a product, service or performance from that company partner.

The purpose of these guidelines is to maintain positive cause marketing relationships, protect World Vision's and our partners' reputations, comply with applicable state laws, and meet the Better Business Bureau's "Standards for Charity Accountability."

The guidelines are divided into the following categories: general (applying to all partnerships), national, local/regional, and Internet.

### General Guidelines

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- Any promotion must fit with World Vision's mission and reflect positively on the organization.
- All cause marketing partners must have and maintain a positive reputation in their communities.
- All cause marketing partners must have a signed and approved agreement with World Vision before any promotion begins.
- Cause marketing partners must submit to World Vision the final design of promotional materials containing the World Vision name or logo for approval before online or offline production or publication.
- All cause marketing promotions to benefit World Vision must follow all applicable laws as well as the Better Business Bureau's Standards for Charity Accountability.
- All cause marketing promotions must clearly state at the point of sale or contact with consumer: the amount per sale or the percent of sale that the partner will donate to World Vision (also, if applicable, any specific maximum or guaranteed minimum donation); the products, services or performances that are included; and the duration of the promotion.
- In accordance with generally accepted cause marketing standards, World Vision may engage in activities that acknowledge its partners through a variety of online and offline channels; however, World Vision does not engage in activities that could be considered advertising or endorsing its partners.
- Promotions must not imply World Vision's endorsement of a product or service.

- Cause marketing partners cannot take an overt political stance.
- Cause marketing partners cannot advocate violence, or use violent references / images.
- Cause marketing partners cannot tolerate or promote racism, religious / national typing, sexism, use sexual references / images / vulgarity, or provide any materials deemed offensive to World Vision supporters.
- Cause marketing partners cannot promote gambling, fire arms, tobacco use, child labor or other like controversial subjects.

## National Guidelines

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- Cause marketing partners must have a signed and approved Cause Marketing Agreement before any promotion begins.
- The cause marketing partner must maintain an accurate and current accounting of each promotion and retain records for three years after it ends.
- The Cause Marketing Agreement must specify:
  - ✓ The charitable purpose of the promotion
  - ✓ The products or services included in the promotion
  - ✓ The geographic area of the promotion
  - ✓ The start and end dates of the promotion
  - ✓ How the World Vision name and logo will be used
  - ✓ The way in which the amount of donation, products or services included and duration of the promotion will be communicated to the public at the point of sale
  - ✓ If applicable, the maximum limit or guaranteed minimum of the donation
  - ✓ An estimate of the goods or services that will be sold during the promotion
  - ✓ A statement that the partner will follow all applicable state laws
  - ✓ A statement that the partner will provide a per unit final accounting to World Vision by a specified date
  - ✓ A donation transfer date, including the way this donation will be received by World Vision.
- All promotional materials must disclose:
  - ✓ The cause marketing partner's name and contact information
  - ✓ World Vision's name and contact information
  - ✓ The amount or percentage of sale that will be donated, products or services included in the promotion and duration of the promotion.
  - ✓ If applicable, the maximum limit or guaranteed minimum of the donation
- All cause marketing promotions to benefit World Vision must follow all applicable state laws. World Vision does not provide legal advice and strongly encourages partners to seek their own legal counsel. The cause marketing contract must be filed by the company or by World Vision in some states. In some states the company must register as a commercial co-venturer.

## Local/Regional Guidelines

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- Cause marketing partners must have a signed and approved Cause Marketing Agreement before any promotion begins. If World Vision's Agreement Template is used without revision, no additional legal review by World Vision is necessary.
- All cause marketing promotions to benefit World Vision must follow all applicable state laws. World Vision does not provide legal advice and strongly encourages partners to seek their own legal counsel.
- The cause marketing partner must keep an accurate and current accounting of each promotion and retain records for three years after it ends. If requested by World Vision or the Attorney General, this accounting must be given within 20 days.

## Internet Guidelines

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- Laws regarding Internet cause marketing partnerships are evolving and not yet settled.
  - ✓ In general, a cause marketing partner must follow the state laws:
    - Where the partner is headquartered
    - Where the partner actively promotes the cause marketing partnership
    - Where the partner expects to earn over \$10,000 or have at least 500 customers through the website.