# CAPhO Cross Marketing Guidelines and Process

These guidelines explain how CAPhO manages cross-marketing activities with external organizations. They provide a consistent process for deciding what CAPhO will promote, when promotion may be provided at no cost, when reciprocity or payment is expected and who reviews and approves cross-marketing requests.

The guidelines apply to external promotion requests received by CAPhO, including events, educational activities, collaborative initiatives and job or volunteer postings. They also apply when CAPhO and an external organization agree to exchange promotional support for each other's relevant initiatives. Routine promotion of CAPhO's own events, opportunities and member communications falls outside of these guidelines.

## Cross-Marketing Guidelines

### Guiding Principles

All cross-marketing activities are guided by the following principles:

- **Alignment with CAPhO's Mission and Vision:** Only promote opportunities relevant to oncology pharmacy and/or related healthcare practice and aligned with CAPhO's mission and vision, values and professional standards.
- **Member Value:** Prioritize opportunities that offer clear educational, professional or career value to CAPhO members.
- **Fairness and Equity:** Apply consistent criteria across organizations. Industry partners are generally expected to pay for promotional access, while non-profit or allied organizations may qualify for no-fee promotion where appropriate reciprocity exists.
- **Reciprocity and Return on Investment:** No-fee promotion is typically based on a meaningful reciprocal benefit (e.g., the partner promotes CAPhO in return). If no reciprocity is provided, paid promotion usually applies.
- **Brand Integrity:** All content must align with CAPhO's Style and Logo Guides and maintain consistency in messaging.

### Eligibility and Approval Criteria

CAPhO considers cross-marketing requests that meet all the following criteria. Requests that do not meet these criteria are declined.

- **Relevance:** The opportunity is clearly related to oncology pharmacy and/or related healthcare practice.
- **Member Benefit:** The content offers tangible value to CAPhO members (e.g., education, professional development, networking or career opportunities).
- **No Conflict:** The request does not conflict with CAPhO's own initiatives, priorities or ethical standards.
- **Value Exchange:** The request includes either a reasonable reciprocal benefit to CAPhO or agreement to paid promotion.

**Paid vs. Unpaid Promotion**

- **Non-Profit and Allied Organizations:**
  CAPhO may offer no-fee promotion where the opportunity meets eligibility criteria, and a reciprocal promotion of a CAPhO initiative is provided. Where reciprocity is not possible, CAPhO may still consider no-fee promotion in limited cases where member value is particularly strong; otherwise, paid promotion applies.

- **Industry and For-Profit Organizations:**
  Requests from for-profit organizations are generally treated as paid promotions, unless a significant strategic partnership or equivalent reciprocal benefit to CAPhO is demonstrated.

- **Job Postings:**
  CAPhO offers a paid job posting service for employment opportunities relevant to oncology pharmacy. Requesters must send the posting text to the Association Management Office (AMO) by email and include a 50-word job description in Word format, the full job description as a PDF file and the closing date. Once reviewed and approved, the posting is placed on CAPhO's News & Updates page for one month and sent as a standalone email to CAPhO members. The current fee is $500. Job postings are not treated as no-fee or reciprocal promotion unless CAPhO has separately approved an exception.

## Communication Channels

CAPhO determines appropriate channels for each approved promotion, which may include the CAPhO website, eNews, direct member emails, CAPhO social media channels or other avenues at CAPhO's discretion.

To protect the effectiveness of CAPhO's communications:

- CAPhO does not re-share external social media posts.
- When social media promotion is appropriate, CAPhO may develop its own content, consistent with CAPhO messaging and branding.
- Promotional content may include a disclaimer noting that CAPhO is sharing information as a service to members and is not formally endorsing external products or services.

## Roles and Responsibilities

- **Communications Chair:** Oversees cross-marketing activities and approves requests that meet these guidelines. Determines when consultation with other Chairs or escalation to the Board is required.

- **Communications Committee:** Supports review and vetting of requests, ensuring consistency, fairness and alignment with CAPhO standards, when requested and/or required.

- **Association Management Office (AMO):** Serves as the primary intake point for requests, maintains the Cross-Marketing Database, supports execution of approved promotions and tracks reciprocity and outcomes.

- **Board of Directors:** Provides oversight, approves these guidelines and reviews non-standard or high-impact cross-marketing arrangements as needed.

## Cross-Marketing Procedure

1. **Request Intake and Logging:** All requests, external or CAPhO-initiated, are submitted to the AMO and/or Communications Chair and recorded in the Cross-Marketing Database.
2. **Initial Review:** The Communications Chair (or designate) reviews the request against eligibility criteria. Requests that do not meet criteria are declined and documented in the Cross-Marketing Database, and the requester is notified by the AMO.
3. **Determine Promotion Type:** Eligible requests are classified as either:
    - Reciprocal (unpaid), with documented reciprocal commitments; or
    - Paid, with applicable fees communicated by the AMO.
4. **Approval and Escalation:** Standard requests are approved by the Communications Chair. Non-standard or sensitive requests are escalated to the Board as appropriate.
5. **Promotion Execution:** The AMO prepares and distributes content through approved channels, ensuring brand compliance and clear identification of partner or sponsored content where applicable.
6. **Reciprocity and Outcome Tracking:** The AMO confirms delivery of reciprocal promotion (where applicable) and records outcomes, including engagement or feedback, in the Cross-Marketing Database.
7. **Review and Maintenance:** The Communications Chair and Board review cross-marketing activity, partner lists, and outcomes annually at the Fall Retreat to ensure continued alignment with CAPhO's mission and vision, and member interests. If cross-marketing activity is particularly high, updates may also be reviewed by the Officers, as appropriate.