January 19, 2016

To my fellow members:

As you know, the Board of Directors has been reviewing the Academy’s corporate sponsorship program.

On behalf of the entire Board, thank you to all members – individuals, Affiliates, Dietetic Practice Groups, Member Interest Groups, delegates, the Foundation Board of Directors and to the members of the Sponsorship Advisory Task Force (SATF). We appreciate the considerable thought and hard work that went into your feedback and excellent recommendations. Your input has helped shape the Board’s action plan.

The Board received the SATF report at our January 13 meeting and found the report to be thoughtful, balanced and helpful. The Board voted to implement a pilot program encompassing many of the SATF’s recommendations. The one-year pilot program includes appointing a Sponsorship Committee to review national-level sponsor opportunities and to develop assessment tools that will support the sponsorship process.

The Board of Directors approved the following newly revised sponsorship guidelines, which take effect immediately for all Academy organizational units. Dietetic Practice Groups and Member Interest Groups will be required to adhere to these guidelines and Affiliates are encouraged to adopt them.

Sponsorship approval requires that:

- The sponsor’s vision and mission align with the Academy’s Vision, Mission and Strategic Goals.
- The sponsor’s product portfolio is broadly aligned with the Academy’s Vision: Optimizing health through food and nutrition.
- The sponsor relationship and sponsor product portfolio are broadly aligned with official Academy positions.
- All aspects of the sponsorship (such as research, consumer messaging or professional education for members) align with the Academy’s Scientific Integrity Principles.
- The Academy does not endorse any company, brand or company products, nor does the Academy’s name or logo appear on any product. Such endorsement is neither actual nor implied.
- The Academy maintains final editorial control and approval of all content in materials bearing the Academy name or logo.
- There is clear separation of Academy messages and content from brand information or promotion.
- Relevant facts and important information are included.

The Board is confident that these revised guidelines and the new Sponsorship Committee pilot program will enable the Academy to better serve the organization and our members.

The Board is committed to transparency in our processes and we welcome member feedback. Please send an email to president@eatright.org.

Again, a special thank you to everyone who contributed to this important effort.

Dr. Evelyn F. Crayton, RDN, LDN, FAND
President 2015-2016
Sponsorship Advisory Task Force
Report to the Academy of Nutrition and Dietetics Board of Directors

December 4, 2015
Executive Summary

Sponsorship Advisory Task Force
Report to the Academy of Nutrition & Dietetics
Board of Directors

The Academy of Nutrition and Dietetics (Academy) works with corporate sponsors based on internal guidelines to guide the organization in meeting its mission to empower members to be food and nutrition leaders. Over the years internal and external criticism warranted the need to review the current guidelines with the goals of providing continual program improvements, enhancing communication and trust among members and the public, and facilitating overall transparency of process and decisions. In May of 2014, the Academy President appointed the Sponsorship Advisory Task Force (SATF) to review the existing guidelines and make recommendations. The 2014 development of the Scientific Integrity Principles (SIP) by the Academy Council on Research provided a critical tool to provide baseline benchmarking in guiding the work of the SATF. The SATF concludes that the current Academy Corporate Sponsorship guidelines need strengthening, supported by specific procedures and tools. Just as with the SIP, the Sponsorship Guidelines will specifically provide cohesion and consistency among all entities under the Academy umbrella, clear internal and external communications, and open and transparent processes and procedures. Openness will strengthen our Academy and promote efficiency and effectiveness in governance.

The following summarizes major decisions regarding the guidelines:

- Vision, Mission and Values of Sponsor and Academy should agree
- Sponsor’s product portfolio should align with the Academy’s Vision and positions
- Utilize the Scientific Integrity Principles to insure Scientific Accuracy
- No endorsement of any brand or product and no use of the Academy’s name or logo on any product
- Full Academy editorial control of content and materials and clear separation of Academy messages from brand promotion
- Relevant facts cannot be left out to present an unbalanced view of a controversial issue

With the intent of providing a process to ensure success of the recommendations, the SATF developed standardized tools to insure transparency for decision making and clear methods for sponsor assessment to be used by ALL Academy units. Finally, the SATF proposes the elimination of “all foods can fit” terminology in reference to sponsorship. This approach is oversimplified and provides a significant loophole that undermines the Academy’s vision, mission and strategic goals and continues to expose vulnerabilities in the sponsorship program.

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The SATF’s work provides standardized processes and procedures within a useable framework and formalized process. If these relationships are managed consistently, the Academy sponsorship program can ensure the Academy retains an influential “seat at the table” and intentionally contributes to a healthier food and nutrition environment in which communities can thrive.

The full SATF report is organized as follows:
SECTION 1 - Brief history of the Academy sponsorship program and events contributing to SATF’s work and conclusions

SECTION 2 - Guidelines and Tools for measuring adherence to guidelines

SECTION 3 - Ethical considerations based on the Academy’s Code of Ethics

SECTION 4 - Environmental scan of sponsorship guidelines used by other professional organizations

SECTION 5 - Communication plan including the recently adopted Board of Directors’ Communication Plan to support the provision of information regarding sponsor decisions and to insure transparency to members and the public

SECTION 6 - Permanent Member Sponsorship Review Committee to support this process and further insure member input and transparency.
SECTION 1
History and BOD Charge to the Sponsorship Advisory Task Force

Historically the Academy worked with an unlimited number of industry companies and brands. The sponsorship of educational sessions comprised up to one-half of the sponsorship dollars generated. In 2007, the Academy implemented a new strategy identifying three levels of corporate sponsorship (National Sponsors, Premier Sponsors, and FNCE/Event Sponsors) providing multi-year relationships that bundled Academy events, programs, and communications channels, resulting in increased sponsorship revenues (approximately 10% of overall Academy revenue). All sponsors were required to adhere to the Academy’s Corporate Relations Sponsors Guidelines. The Academy Foundation has an extensive Sponsorship Program as well.

Controversy surrounding sponsorship has resulted in every industry collaboration being considered in light of the Strategic Plan and how a proposed program can advance it. Alignment with the Academy’s vision, mission and values is particularly important.

In the past few years, members and various public groups expressed concerns regarding specific sponsors and sponsorship in general. The Academy responded by working with an independent research firm to survey active Academy members, measuring their understanding, awareness, and attitudes about the Academy’s corporate sponsors and the sponsorship program. Some members question the validity of the surveys being geared toward sponsor benefits rather than members’ benefits of the sponsorship program. There is also concern that some have not renewed Academy memberships due to Sponsorship issues. Since 2007, Academy members’ awareness levels of sponsors, as assessed through Academy surveys, rose from 13% to 59%. Additionally, an increase in expressions of interest or concern regarding sponsorship activities was noted.

The Sponsorship Advisory Task Force was appointed in the Spring of 2014 (See Appendix 1 for Task Force Members and backgrounds).

The SATF’s original charge from the Academy President in 2014 was:

1) Make recommendation regarding the existing Corporate Sponsorship guidelines;
2) Suggest criteria for establishing a pro-bono category for National Sponsorship-level recognition;
3) Review policies and practices regarding industry-sponsored continuing education.

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4 Academy of Nutrition and Dietetics’ Strategic Plan. Available at www.eatright.org/Strategic.
November 2014
The SATF meeting at FNCE in 2014 revealed the massive scope of the taskforce’s work. In response, the SATF requested and received permission to pursue only the first charge – reviewing and making recommendations of existing sponsorship guidelines. After six months of review and discussion, the SATF reached the following conclusions:

- The newly developed Scientific Integrity Principles (SIP) developed by the Council on Research set the baseline benchmarking and overall philosophy for the Academy’s relationship with private entities. For consistency, the policies for every organizational unit of the Academy (Foundation, DPG, MIG, and State Affiliates) should align with these principles.
- Using the SIP as the overarching document and benchmark, current Academy Corporate Sponsorship guidelines were strengthened and revised. Additionally, the SATF’s task became to define a procedural framework for the guidelines.
- The SATF concluded “all foods can fit” is no longer a helpful concept when defining relationships with sponsors. This concept caused the Academy to defend a simple phrase rather than actual facts. This approach can also provide a significant loophole in the application of the Guidelines to sponsorship decision, and thus undermines the Academy’s vision, mission and strategic goals.

Spring 2015 HOD Meeting
The decision by the Academy and the Academy Foundation to partner with Kraft Foods by placing the Kids Eat Right logo on the Kraft Singles (processed cheese product) label focused unprecedented pressure from members and the public on the Academy’s Sponsorship relationships. To many of the Academy members, this was seen as a violation of the sponsorship guidelines regarding the use of the logo and product endorsement.

In response to the mounting criticism, the Academy placed a “hold” on all sponsorship decisions until the House of Delegates (HOD) could consider the issue and provide member feedback to the Academy and the SATF and until the SATF could then complete its task. SATF continued to study the current sponsorship program and review other professional medical organizations’ sponsorship guidelines while awaiting HOD outcomes from the Spring 2015 meeting.

Motion from the HOD 2015 Spring Virtual Meeting
The HOD conducted a dialogue on the Academy’s Sponsorship Program on May 2 and May 3, 2015. The purpose of the dialogue session was for meeting participants to:

- Understand the impact of the sponsorship program on the profession, Academy Foundation, and the Academy, including DPGs, MIGs and Affiliates.

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2. Analyze the Academy’s steps in evaluating alignment with a potential sponsor.
3. Identify elements of the Academy’s sponsorship program that need to be retained or modified.

Based on the dialogue, a series of guiding principles were identified related to actions needed:

1. Effects of sponsorship, or lack thereof, on Academy and Foundation programming will be evaluated with a full report distributed to the HOD and subsequently disseminated to members by September 1, 2015.
2. A comprehensive, strategic communications plan utilizing diverse strategies for outreach and input will be developed.
   - All communications to members will be clear and concise throughout the entire sponsorship evaluation process.
   - Input will be solicited from the HOD in evaluating potential sponsors as the HOD is the voice of the membership.
3. The Academy and the Foundation will be transparent with details of any agreement with a sponsor or partner fully disclosed (e.g., amount received, allocation of funds, purpose, commitments, deliverables). A sponsorship annual report and a web page outlining sponsorship details will be available for members to view.
4. Sponsorship Guidelines will be developed to include the following concepts:
   - Academy or Foundation logos will not appear on food or beverage products;
   - The Academy or Foundation will not endorse any products;
   - A designated proportion of a potential sponsor’s food or product line will be consistent with evidence-based nutrition guidelines or comparative standards; the Sponsorship Task Force will determine this proportion based on substantial research and evaluation of standards from comparable non-profit organizations;
   - Opportunities will be provided for smaller companies to engage in sponsorships or partnerships with the Academy and Foundation;
   - All sponsors and partners will support and promote healthy eating, the expertise of Registered Dietitian Nutritionists (RDNs) and Nutrition and Dietetic Technicians, Registered (NDTRs), and the vision, mission and goals of the Academy;
   - Contracts that are re-negotiated will fall under the approved sponsorship guidelines.
   - Sponsorship guidelines of all Academy organizational units (including the Foundation, DPGs, and MIGs) will align with the Academy’s Sponsorship Guidelines. Affiliates will be encouraged to utilize the Academy’s Sponsorship Guidelines. These Guidelines will be reviewed annually.

5. A Sponsorship Committee will be established as a permanent committee of the Academy. The Sponsorship Advisory Task Force will determine the number of members on the Sponsorship Committee. The Sponsorship Committee will include Academy members with diverse viewpoints and areas of expertise including a public member, a member with marketing/branding experience, a
current HOD representative, and a current member of the Academy’s Ethics Committee.

“Therefore, be it resolved that the House of Delegates requests that the Sponsorship Advisory Task Force utilize the Spring 2015 HOD meeting discussions to develop a plan providing clear direction to the Academy, Foundation and all organizational units on how to engage in sponsorship and partnership opportunities. A report from the Sponsorship Advisory Task Force will be presented to the House of Delegates at or before the Fall 2015 HOD Meeting. The final plan will be reviewed and approved by the House of Delegates prior to being presented to the Board of Directors.”

SATF Actions from the Spring HOD meeting included the following:
A member of the Ethics Committee was added to SATF to insure that both the literal and implied aspects of sponsorship decisions were considered.
A member of the Consumer Protection and Licensure Subcommittee was added to SATF to assure important consideration of how sponsorships created with external stakeholders affect the efforts of those engaged in licensure and consumer protection efforts. Those who oppose licensure for RDNs are vocal and critical of Academy sponsors, perceiving the exchange of money influences decisions and creates a bias. Negative publicity surrounding sponsorship activities for the Academy makes it difficult to assure legislators and others that RDNs are the ones who can be trusted to protect the public from harm. Such perceptions may raise questions regarding the establishment and/or maintenance of licensure if the perception is that RDNs are being influenced by the food industry or other sources. This will be an important consideration to continue to explore as future decisions are made.  

Subsequently, the House Leadership Team planned for the Saturday morning 2015 Fall HOD meeting to be devoted to discussion and a summary report from SATF.

Fall 2015 HOD Meeting
Several members of the SATF were present at this Fall HOD discussion and a summary of SATF decisions to date was presented by the SATF chair. SATF received discussion summaries from the HOD, utilizing this member feedback to prepare the final report to the BOD. This meeting resulted in the following motion:

“Therefore be it resolved that the House of Delegates requests the Sponsorship Advisory Task Force to utilize the HOD’s feedback from the Fall 2015 Workbooks, as well as documents provided to delegates (i.e., impact reports, Sponsor Summit Report) to finalize their report to the Board of Directors. The HOD requests that the BOD considers the HOD’s feedback as they

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prepare to take action on the SATF’s final report. The final SATF report will be distributed to the HOD after action is taken by the BOD.\textsuperscript{9, 10, 11}

SATF Members

The members of SATF represent various practice areas, Academy leadership experiences, and employment situations (See Appendix 1). These varied backgrounds, combined with extensive member feedback, meant that the SATF represented the diverse perspectives of Academy members. Listening to members through the various communication methods such as DPG listservs, social media, state affiliate communication boards, elected representatives in the HOD, and personal communications makes it evident that some Academy members strongly oppose the current sponsorship program, and some strongly support it. At the same time, the Academy struggles to determine what the majority of members feel about any issue. It remains the case that the issue of sponsorship had brought out more member opinions on both sides, and that is good. In an attempt to understand member reactions, the Task Force read through hundreds of pages of comments and reactions. These comments from every viewpoint, certainly were reviewed and informed the SATF’s considerations.

\textsuperscript{9} HOD Recorder Workbook Consolidations, Saturday, Fall House of Delegates Meeting, October 3, 2015.
\textsuperscript{10} Impact of Sponsorship on the Academy of Nutrition and Dietetics Report to the Fall 2015 House of Delegates
\textsuperscript{11} Impact of Sponsorship on the Academy of Nutrition and Dietetics Foundation, Report to the Fall 2015 House of Delegates
SECTION 2
Revised Sponsorship Guidelines

The SATF reviewed all of the supportive documents developed for the Sponsorship program over the years, including information provided to Sponsors at annual Sponsor meetings and at FNCE. The Sponsorship guidelines and philosophies of other professional societies were also reviewed. As noted earlier, the backgrounds of Task Force members included a variety of Academy, Affiliate and DPG leadership positions. All of these experiences also provided background for Task Force discussions and decisions. The revised guidelines are:

- The Sponsor’s Vision and Mission aligns with the Academy’s Vision, Mission and Strategic goals.
- The Sponsor’s product portfolio aligns with the Academy’s Vision—Optimizing health through food and nutrition.
- All aspects of the sponsorship (such as research, consumer messaging, or professional education of members) align with the Academy’s Scientific Integrity Principles.
- The Sponsor relationship and Sponsor product portfolio aligns with official Academy positions.
- The Academy does not endorse any company, brand or products, nor does the Academy name or logo appear on any product. Such endorsement is neither actual nor implied.
- The Academy maintains final editorial control and approval of all content in materials bearing the Academy name or logo.
- There is clear separation of Academy messages and content from brand information or promotion.
- Relevant facts and important information should be included where their omission would present an unbalanced view of a controversial issue in which the sponsor has a stake.

To insure more objectivity and transparency in the Sponsorship decision making process, the SATF developed a set of tools to assist in the documentation and analysis of the sponsorship decision making process. The tools consist of three documents.

- A Request for Information document regarding basic information about a proposed Sponsor, to be completed by the proposed Sponsor.
- A risk/benefit analysis and other objective data gathering regarding the proposed Sponsor to be completed by Academy Staff. There is currently a risk/benefit analysis performed but the proposed tools formalize this process.
- A scoring tool to be used by the Member Sponsorship Review Committee (MSRC) to make decisions regarding potential sponsors.

Sponsor Request for Information, Staff Analysis, and Evaluation Tools

A sponsorship between the Academy and industry must be based on mutual goals and values. The risk/benefit analysis should be as objective as possible, including the shared value proposition on which sponsorship is based.

All divisions within the national organization, including the Academy, the Foundation, the Affiliates, the Dietetic Practice Groups (DPGs) and the Member Interest Groups (MIGs), may engage in sponsorships.
with industry that can assist the Academy in fulfilling its vision, mission and strategic goals. The following process and tools are to be used to guide Academy leaders in objectively assessing the risk/benefit of any industry sponsorship.

**Procedure Overview**

Upon initial contact with a prospective industry entity, the Academy shall:

- Inform the company that any Academy sponsorship is subject to the review and approval of the Academy.
- Obtain background information from the company using the Sponsorship Request for Information (Form A).
- Obtain background information on the company as needed through sources available to staff and add to information obtained from the company. (Form B)
- Evaluate all aspects of the information collected from the company and information collected by staff using Sponsorship Assessment Tool. (Form C)
FORM A
SPONSORSHIP REQUEST FOR INFORMATION

Completed by Company

ACADEMY OF NUTRITION AND DIETETICS

Vision
Optimizing health through food and nutrition

Mission
Empowering members to be food and nutrition leaders

Strategic Goals
The public trusts and chooses Registered Dietitians as food and nutrition experts.
Academy members optimize the health of individuals and populations served.
Members and prospective members view the Academy as vital to professional success.
Members collaborate across disciplines with international food and nutrition communities.

1. Name of Parent Company
2. Address
   a. Street
   b. City/State/Postal Code
3. Name Key Contact Person
   a. Daytime Telephone
   b. E-mail Address
4. Company Vision, Mission and Values
5. Describe how the company’s vision, mission and values are consistent with the Academy’s vision, mission and strategic goals.
6. Attach or provide link to parent company’s current corporate social responsibility report.
7. Attach or provide a link to parent company’s current annual report.
8. Specific Brand[s] [if not entire company] to be in Sponsorship [all following questions relate to these brands, if listed].
9. Describe advertising and marketing policies related to children.\(^\text{12}\)
10. List and provide a link to information for the company/brand’s top five products based on sales.
11. Describe the company/brand’s commitment to food, nutrition and health.
12. Attach, or link to evidence-based-science that supports the health benefits of products specified in number 10.
13. Describe if the company/brand[s] is working to develop healthier products in the future [next 24 months].
14. Describe how company/brand employs or works to support the profession of food, nutrition and dietetics.

Form B

SPONSORSHIP BENEFIT/RISK ANALYSIS

Completed by Academy Staff

1. What is the company/brand’s Harris Poll Reputation Quotient?
2. What is the company/brand’s Corporate Social Responsibility Index?
3. Provide score of the company/brand for at least one (1) of the following corporate responsibility indices for the company and/or associated brands (if applicable):
   - Thomson Reuters Corporate Responsibility Indices
   - The Good Guide
   - Just Means Insight
   - Human Rights Campaign Corporate Equality Index
   - ClimateCounts.org
   - Monterey Bay Aquarium Seafood Watch
   - Fair Trade USA
   - Other ____________________
4. Describe how this company/brand enhances nutrition or health status of the population or other targeted markets.
5. Describe how this company/brand sponsorship enhances the credibility/recognition of the Academy, its divisions and members.
6. Describe how this company sponsorship has potential to cause harm (real or perceived) or has unintended consequences to the Academy, the Foundation, or any of its divisions.
7. Describe any potential conflicts of interest (real or perceived) with the company, products, or services of the Academy, the Foundation, or any of its divisions.
8. Provide information on company/brand media coverage or reports in the past 24 months.
9. If products of company/brand are a food or beverage, describe how each of top five (5) products aligns with the current U.S. Dietary Guidelines for Americans (Sample Format, Appendix 4)
10. If products of a company/brand are a food or beverage, describe how each of the top five products aligns with the food equivalents of the current US Dietary Guidelines (Sample Format, Appendix 4)
11. Describe how company/brand’s products/services specified in the sponsorship align with current Academy’s position papers, as appropriate.
12. Describe how the proposed collaboration complements (or at least does not contradict or interfere with) the Academy of Nutrition and Dietetics public policy and advocacy priority areas. Consider the impact on RDN licensure laws and consumer protection advocacy efforts.

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13 Questions #3, 4, 5, 6, and 7 are taken from Academy Policy and Procedure Manual, Communication Section C2, Guidelines for Industry Relationships.
14 RDN expertise will be required for some of the analysis.
FORM C
SPONSORSHIP ASSESSMENT SCORING TOOL

This decision-making tool is used by the Member Sponsorship Review Committee (MSRC), the Corporate Relations Team, and the Board of Directors in determining the value of Academy sponsorship. Based on the information provided in the Request for Information and the Staff Risk/Benefit Analysis, use this Assessment Tool to score each indicator. A total score and a mean score for each question [from those submitted by members of the MSRC will be provided to the Board of Directors for final approval.

Scoring scale: Points: 2=Strongly Agree
1=Agree
0=Neither Agree or Disagree
-1=Disagree
-2=Strongly Disagree

Company Name: _____________________________________________

Brand(s) if sponsorship is with Specific Brand: ________________________

NOTE: The term Sponsoring Entity will apply to either a Company OR a Brand or Brands within a company, depending on the terms of the sponsorship.

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<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neither Agree or Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
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<td>1. Rate how the Company's vision, mission and values align with the Academy's vision, mission and strategic goals.</td>
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<td>2. The Company is committed to food, nutrition and health.</td>
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<td>3. The Sponsoring Entity has show commitment to offering healthier products with ongoing development of these products.</td>
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<td>4. The Sponsoring Entity supports the profession of food, nutrition and dietetics.</td>
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<td></td>
<td>Strongly Disagree</td>
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<td>Neither Agree or Disagree</td>
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| 5. | The Sponsoring Entity scores well on the following indices:  
   • The Harris Poll Reputation Quotient  
   • Corporate Social Responsibility Index  
   • Other (name) |          |                           |       |                |
<p>| 6. | The Sponsoring Entity follows the Children's Food and Beverage Advertising Initiative (CFBAI) guidelines in advertising and marketing to children. |          |                           |       |                |
| 7. | There is evidence-based-science to support the health benefits of Sponsoring Entity’s products. |          |                           |       |                |
| 8. | The Sponsoring Entity’s products align with the current U.S. Dietary Guidelines. (Skip if not a food/beverage) |          |                           |       |                |
| 9. | The Sponsoring Entity’s products align with the current U.S. Dietary Guidelines food equivalents. (Skip if not a food/beverage) |          |                           |       |                |
| 10. | The Sponsoring Entity’s products/services specified in the relationship align with Academy’s position papers. |          |                           |       |                |
| 11. | The Sponsoring Entity enhances nutrition or health status of the general population or specified targeted markets. |          |                           |       |                |</p>
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<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neither Agree or Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
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<tr>
<td>12. The proposed sponsorship with Company/Brand will position Academy members as the food and nutrition experts with consumers.</td>
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Note: A score below +1 for any of these 3 following areas will necessitate the rejection of the proposal. There may be a reapplication when this situation is corrected.

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<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neither Agree or Disagree</th>
<th>Agree</th>
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<td>13. The proposed Sponsoring Entity causes no harm (real or perceived) or has no unintended consequences to the Academy, its divisions or members.</td>
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<td>14. The proposed Sponsoring Entity does not interfere with the Academy advocacy efforts. Consider the impact on RDN licensure laws and consumer protection advocacy efforts.</td>
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<td>15. There are no potential conflicts of interest (real or perceived) with the Sponsoring Entity, its products, or services and the Academy, Foundation, or any of its divisions.</td>
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Reviewer Name__________________________________________Date________________
SECTION 3
THE ACADEMY CODE OF ETHICS: SPONSORSHIP CONSIDERATIONS

The Code of Ethics is written to provide guidance to individual practitioners, not to the organization. However, Principle 18 can be applicable to sponsorship guidelines and relationships and can assist in answering questions.\(^{15}\)

1. Does accepting a business sponsorship with this company affect or reasonably give an appearance of affecting the professional judgment of the Academy/members?
2. Would this sponsorship create in reasonable minds a perception that the Academy’s or members’ ability to carry out professional responsibilities with integrity, impartiality and competence would be impaired?

Principle 18: The dietetics practitioner does not invite, accept, or offer gifts, monetary incentives, or other considerations that affect or reasonably give an appearance of affecting his/her professional judgment.

Clarification of Principle:

a. Whether a gift, incentive, or other item of consideration shall be viewed to affect, or give the appearance of affecting, a dietetics practitioner’s professional judgment is dependent on all factors relating to the transaction, including the amount or value of the consideration, the likelihood that the practitioner’s judgment will or is intended to be affected, the position held by the practitioner, and whether the consideration is offered or generally available to persons other than the practitioner.

b. It shall not be a violation of this principle for a dietetics practitioner to accept compensation as a consultant or employee or as part of a research grant or corporate sponsorship program, provided the relationship is openly disclosed and the practitioner acts with integrity in performing the services or responsibilities.

c. This principle shall not preclude a dietetics practitioner from accepting gifts of nominal value, attendance at educational programs, meals in connection with educational exchanges of information, free samples of products, or similar items, as long as such items are not offered in exchange for or with the expectation of, and do not result in, conduct or services that are contrary to the practitioner’s professional judgment.

d. The test for appearance of impropriety is whether the conduct would create in reasonable minds a perception that the dietetics practitioner’s ability to carry out professional responsibilities with integrity, impartiality, and competence is impaired.

Note: It is suggested that Principle 18 be used as a form, to be signed annually, as indicated below.

All members of the Member Sponsorship Review Committee, the Board of Directors, the Academy E-Team and Academy Staff Liaisons agree to the tenants of the Academy Code of Ethics and will use Principle 18 as their guide in the decision making process for Sponsorship. This document will be reviewed at the beginning of every meeting, conference call or discussion and those involved in the sponsorship review process will be accountable for adhering to Principle 18 of the Code of Ethics. Any breach or circumventing is cause for removal from the position.

Signature ___________________ Position ___________________ Date __________

Section 4
Environmental Scan of Sponsorship Guidelines or Procedures of Other Professional Groups
As part of the background research for SATF’s deliberations, SATF conducted an extensive review of internal Academy documents, particularly those involving sponsorship decisions and activities. In addition, the SATF reviewed sponsorship guidelines from other health/medical groups. Virtually all of these groups have guidelines and an extensive variety of procedures to ensure compliance. The Council on Medical Specialties is composed of over 30 non-profit, health related organizations. In 2009 the Council’s Board appointed a Task Force on Sponsorship. These guidelines combine all functions: education, research, exhibits, advertising, scholarships, etc. The guidelines are voluntary and when adopted by individual member societies, there can be varying “annotations” to explain how the guidelines are interpreted or applied. Two guidelines of interest involve 1) clear disclosure of conflict of interest which are publically available and 2) groups will make a reasonable effort to seek multiple Corporate Sponsors for projects.
Guidelines from the following groups were also reviewed:
- The American Medical Association
- The American Academy of Pediatrics
- The American Pharmacists Association
- The American College of Cardiology

Section 5
Sponsorship Comprehensive Strategic Communications Plan and Crisis Management
Member feedback via both 2015 HOD meetings stressed a need to improve communication with both Academy members and the public (including consumers, stakeholders, and sponsors). The newly adopted Communication Plan by the Academy BOD will be implemented to communicate new Sponsorship decisions and other relevant information. This plan will formalize a policy of transparency of communication and is included as Appendix 2.

A Crisis Management Plan should be in place for each sponsor, flowing from the Risk Management process that is a formal part of the Sponsorship Request for Information, Staff Analysis and Member Sponsorship Review Committee voting. When this process identifies potential areas of concern, a Crisis Management plan will be implemented immediately by the Communication Team with input from outside experts if necessary.

Section 6
Member Sponsorship Review Committee (MSRC)
The Academy’s procedures and formal agreements for sponsorship with external organizations are designed to prevent any undue corporate influence (or the perception of such) and assurances of the transparency and benefits to Academy members. The Member Sponsorship Review Committee (MSRC) will be composed of Academy members and helps ensure an important “check and balance” in the Sponsorship decision process.
The major Functions of the committee are to:
- Represent the members of the Academy regarding Sponsorship decisions
- Provide assessment and input to the risk/benefit process
- Assure the “intent” of Academy guidelines are met
- Identify any potential crisis management concerns as they arise and communicate them to the BOD

The following committee composition and procedures are developed to provide initial definition and guidance for this newly established concept. It is obvious that as the group begins to function it will be necessary to refine and further define its operating schedules and procedures.

Proposed Committee Composition
The Member Sponsorship Review Committee is a standing committee of the Academy Board of Directors, comprised of nine members recommended by the Academy groups below and appointed by the Academy Board of Directors. Recommended makeup of the Committee is:
- Four members representing the Academy House of Delegates, two each from affiliates and dietetic practice groups. HOD appointments would be selected by an application process. The House Leadership Team (HLT) will review applicants and choose via lottery from those who meet minimum qualifications. The four members from the HOD cannot represent the same affiliate or DPG during concurrent terms.
- One member representing the Academy Board of Directors (must be a Registered Dietitian or DTR)
- One member representing the Academy Foundation Board of Directors (must be a Registered Dietitian or DTR)
- One member representing the Academy Member Ethics Committee
- One member representing the “Under 30” membership group
- One at-large Academy member

Note: Appointments do not need to be filled by members currently serving on these organizational units, but individuals should have served in that capacity within the previous three years. SATF suggests that members could apply to fill the position of at-large member. Applications would be reviewed and qualified applicants could be selected, perhaps by a lottery. This would be another step in demonstrating member involvement.
Individuals may be reappointed to serve on the MSRC after a three year hiatus.
Term of Service is three years, with 1st, 2nd and 3rd year appointments staggered in year one to provide cohesion and consistency to the newly formed group. Members of the Member Sponsorship Review Committee will submit a Conflict of Interest document that will be kept on file and updated at least annually. Members should review COI at the start of each meeting and recluse themselves from voting on any submissions that may be a COI.

It is anticipated that all Member Sponsor Review Committee meetings will be conducted by conference call. All meetings, whether via email, phone or in person, must have attendance by a quorum as defined by the Academy of Nutrition and Dietetics. As of 2015, a quorum constitutes 2/3 of members, which would be 6 members of this 9 member committee. An estimated time commitment for the position would be 10 hours per month. Time commitment may change based upon number of applicants, projects being developed, and other factors.

It is probable that Committee may need to utilize subcommittees to accomplish some work, particularly of other Academy Groups (DPG’s, Foundation, etc.)

Proposed Process (See Process Chart, Appendix 5)
The Academy Corporate Relations Team (CRT) will provide the Committee with a completed request for information packet that includes all submissions from the proposed sponsor including:

- Completed Request for Information and supporting documentation (Form A)
- Risk/Benefit Analysis by Academy staff and supporting documentation (Form B)

The Committee will review each potential corporate sponsor using the Sponsorship Assessment Tool (Form C). The Committee may need to utilize expert reviewers of applications to determine accuracy and/or strength of the scientific research stated in the sponsorship application packet. The MSRC will utilize DPG and MIG Executive Boards to recommend expert RD reviewers of applications as needed.

On the regularly scheduled monthly call, the committee chair will provide the committee members information on the scoring averages for each question and total for each proposed sponsorship entity under consideration. The committee chair will then call for a vote for approval or disapproval of the sponsor application at which time further discussion can be held. All requests for information will have a final decision from the MSRC within 31 days of receipt.

If approved, a summary report with a final recommendation will be submitted to the Academy Board of Directors for a final decision. Negotiations can proceed regarding further details of the sponsorship. Should the sponsor application result in separate project proposal, such proposals will be reviewed by the Committee prior to final Board approval to ensure Sponsorship Guidelines have been followed. All committee recommendations and final scoring will be available for member access via the Academy website.

The list of Approved Sponsors can be found on the Academy Website.
Violations
If any Academy unit, staff or a member reports a violation of the sponsorship agreement and it is deemed to be factual information, then the approval for the sponsorship agreement will be withdrawn. That sponsor will not be allowed to participate in any events or sponsorship activities with any Academy unit. The sponsor may be permitted to submit a new universal application after one year.

Reapplication Process
Sponsorship approvals are valid for 3 years unless otherwise stated. A new request for information must be resubmitted in time to avoid any lapse of approval if the sponsor is working on ongoing projects or activities with the Academy or any of its units. If a sponsor is approved nationally, then that approval extends to other Academy units.

Document storage
Committee recommendations and scoring will be available for any Academy member to easily access via the Academy website. Additionally, Committee documents regarding the decisions of the committee and the scoring documents will be stored according to the procedures used for tax records to insure consistency of decisions as well as availability to insure transparency of the process.

SUMMARY
The Sponsorship Advisory Task Force has reviewed member feedback from both the 2015 HOD Spring Virtual Meeting and the Fall 2015 HOD meeting at FNCE. It has reviewed the Academy Strategic Plan, the existing Sponsorship policies and guidelines, and the sponsorship policies and guidelines from other groups. In addition, members from both the Academy Ethics Committee and the Consumer Protection and Licensure Subcommittee have become Task Force members and advised SATF throughout the process. This report proposes strengthened guidelines, and a set of procedures and tools to answer the request from members for greater objectivity and transparency. Lastly, procedures are included for member input into the sponsorship decision process. SATF realizes that staff and member leader training will be necessary for the implementation of these guidelines.

RESPECTFULLY SUBMITTED by the members of the Sponsorship Advisory Task Force
Appendix

Appendix 1: Sponsorship Advisory Task Force Members

Task Force Chair:
Kathleen W. McClusky, MS, RDN, FAND
Professional affiliations:
- 17 years with Morrison Healthcare, a division of Compass USA
- 24 years in State Government in New York and North Carolina
- Adjunct Faculty and Internship Director
- Corporate Consultant for national & international systems

Academy affiliations:
- National: Academy Treasurer and Foundation Chair
- 12 years in various elected positions in House of Delegates
- Management in Food and Nutrition Systems Practice Group Chair
- Affiliate President in Missouri and New York

Hope Barkoukis, PhD, RDN, LD
Professional affiliations:
- Interim Department Chair, and Associate Professor
  - Nutrition Department, School of Medicine
  - Case Western Reserve University
  - Cleveland, Ohio
- Research Dietitian, Metro-Health Medical Center
- Private Practice-Fortune 500 Companies focus on wellness programming & sports nutrition
- Coordinator, National Nutrition Education & Training Program

Academy affiliations:
- Member, Committee on Professional Development; Committee Member- Sponsorship Task Force, DPG Development-SCAN
- Appointed as AND representative to American College of Sports Medicine
- Prior: SCAN Chair
- Member: Ohio Academy of Nutrition & Dietetics
- Member: DPGs: SCAN, NE, DIFM, Pediatrics, Research, Food & Culinary, Healthy Aging, Public Health/Community, Nutrition Educators of Health Professionals

Ashley Colpaart, MS RD
Professional affiliations:
- ABD Doctoral Candidate, Colorado State University
- Founder/CEO The Food Corridor
- Food System Research and Policy Consultant

Academy affiliations:
Promoting Ecological Sustainability within the Food System (JAND 2013); Local Support for Nutrition Integrity in Schools (2012); Food and Nutrition Professionals Can Implement Practices to Conserve Natural Resources & Support Ecological Sustainability (JADA 2010).

- Affiliate: Colorado Dietetic Association; Northern Colorado Dietetic Association; State Policy Representative, Texas Dietetic Association, 2008
- DPG: Chair of HEN 2012-2015; Policy Committee Chair, HEN 2007-2011.

Joe Derochowski
Professional affiliations:
- Executive Director, the NPD Group
  - New product innovation
  - Business development consultant
  - Marketing strategy and tactics

Academy affiliations:
- Past Academy Public BOD member

Lisa Dierks RDN, LD
Professional affiliations:
- Nutrition Manager for Mayo Clinic Healthy Living Program
- Board member for the University of Minnesota Extension - SE MN Regional Sustainable Partnership

Academy affiliations:
- National: Current member of Ethics committee (HOD appointed)
- Affiliate - Minnesota: Past president, Delegate 2011-2014
- DPG - Hunger and Environmental: Secretary 2012-2014

Dr. Glenna McCollum, MPH, RDN, FAND
Professional affiliations:
- Vice President of Health and Nutrition for PhycoBiosciences
- Inaugural President of Chandler University
- Director of Nutrition for Central Arizona College for over 17 years
- Major fund-raiser and CEO for the Chandler Education Foundation, Chandler AZ

Academy affiliations:
- National: 2013-2014 President of the Academy of Nutrition and Dietetics
- Academy Board of Directors
- The House Leadership Team and Speaker of the House of Delegates 2009-2010.
- HOD as the Arizona Affiliate Delegate (6 years) and Professional Issues Delegate (3 years).
- Finance and Audit Committee, Honors and Awards Committee Chair, Legislative and Public Policy Committee, Quality Management Committee, and others.
- During her year as President, she belonged to every DPG and MIG and continues to belong to numerous DPGs and various MIGs. She is a member of the Arizona Affiliate.
Leah McGrath, RD, LDN
Professional affiliations:
- Retail Dietitian
- Served as a dietitian and officer in the U.S Army, as a WIC and Nutrition Director.
Academy affiliations:
- Affiliate: North Carolina Academy of Nutrition and Dietetics
- DPG: Food and Culinary Professionals (FCP) and DBC (Dietitians in Business Communications)

Wendy Phillips, MS, RD, CNSC, CLE, FAND
Professional affiliations:
- Division Director of Nutrition, Morrison Healthcare
- Clinical Nutrition Director, University of Virginia Health System
- Representative to Sponsorship Advisory Taskforce to represent the impact of sponsorship on licensure and consumer protection efforts in states.
Academy affiliations:
- National: Consumer Protection and Licensure Subcommittee
- Affiliate: Immediate Past President, Virginia affiliate
- Professional Education Chair, Virginia affiliate
- DPG: Nominating Committee Chair, Clinical Nutrition Manager DPG
- DPG membership: SCAN, Dietitians in Nutrition Support

Matt Ruscigno, MPH, RDN
Professional Affiliation:
- Self-Employed, blogger
Academy affiliations:
- DPG’s: HEN, PHCNPG, SCAN, VN

Susan Lynn Roberts JD, MS, RDN
Professional affiliations:
- Vice President, Strategic Initiatives, Partnership for a Healthier America
- Executive Director, WK Kellogg Foundation Food & Society Policy Fellows Program
- Staff, Drake Agricultural Law Center
- Founder, Sue Roberts Health Concepts
- Director, Public Health Nutrition, Iowa Department of Public Health
- Research Dietitian, University of Iowa Clinical Research Center
Academy affiliations:
- National Task Forces - Sustainable Food Systems; Corporate Sponsorship
- Hunger and Environmental Nutrition DPG, Chair, Board; Nutrition Entrepreneurs DPG, Board
- State Legislative Liaison, Past Media Spokesperson

Former Sponsorship Advisory Task Force Members
Milton Stokes, PhD, MPH, RDN, CDN, FAND    Chris M. Wharton PhD, FAND
Appendix 2

Board of Directors - Communication Initiative

*October 2015*

The Academy is committed to accountability through transparency and fiduciary responsibility. A high priority is ensuring members have regular and timely access to information and a firm understanding of the Academy’s operations and its ongoing strategic direction. The Board of Directors communicates its actions, decisions, news, programs and initiatives to members and seeks stakeholders’ input and feedback on programs and processes. The following communication initiative reaffirms the Academy’s commitment to being open and transparent in its processes and communications.

**Objectives**

- Implement ways to keep members informed about the Board’s decisions, news, programs, initiatives, Academy successes and other important information
- Maximize members’ knowledge and understanding of information that affects them
- Obtain member feedback on important issues prior to Board decisions
- Engage members in the directions and initiatives of their Academy.

The following documents are available online at [www.eatrightPRO.org/transparency](http://www.eatrightPRO.org/transparency)

- Annual Report with independently audited financial statements
- Bylaws and Policies
- Strategic Plan
- Scientific Integrity Principles
- Position and Practice Papers
• Organizational Responsibility Report

• Board of Directors
  o CEO Report
  o Nominations and Elections Process

• House of Delegates Mega Issues Backgrounders
  o Spring 2015 Meeting (dialogue on Academy’s Sponsorship Program)
  o Spring 2015 Meeting Committee Reports

• Corporate Sponsorship
  o Guiding Principles of Academy’s Corporate Sponsorship Program
  o Academy’s Guidelines for Corporate Relations Sponsors
  o Transparency: Facts about Corporate Sponsorship

Types of information to be distributed
• Significant decisions made by leadership groups
  o Academy Board of Directors
  o Foundation Board of Directors
  o House of Delegates
  o Commission on Dietetics Registration
  o Accreditation Council for Education in Nutrition and Dietetics

• Summaries of Board meetings

• Leader video messages

• Academy Update speeches and presentations

• Quick-response member micro-polls

Distribution strategies
• Distribute message to target audiences (Academy groups and individuals):
  o Foundation Board
  o House of Delegates
  o Affiliate/DPG/MIG groups and leaders
  o Spokespeople (current and past, national and state)
  o ACEND
  o CDR
  o Committee chairs
  o Past presidents
  o Headquarters staff
  o Health professional colleagues
  o The media and public (when appropriate)

• Communication vehicles
  o All-member emails
  o EatRightPRO website
  o Eat Right Weekly
- Social media outreach PRO channels
- *Food & Nutrition Magazine* (as appropriate)
- *Journal of the Academy of Nutrition and Dietetics* (as appropriate)
- Affiliate, DPG and MIG newsletters and websites
- Communities of Interests information portals
- Individual emails
- Media communications including press releases, news alerts, letters to the editor

**Assess and evaluate communications**
- Solicit feedback from members
  - Emails
  - Micro-surveys
  - Focus groups
  - Baseline and follow-up surveys on multiple issues
- Solicit feedback from staff who work with DPGs, MIGs, Affiliates, Spokespeople HOD, BOD, etc.
  - Evaluate and monitor
    - Social media
    - Website analytics
    - Member surveys
    - Emails from members
      - Determine additional ways to redistribute message for maximum outreach
Appendix 3
A position paper is a critical analysis of current facts, data and research literature. A key feature of the paper is the position statement, which presents the Academy's stance on an issue. The Academy and its members, other professional associations, government agencies and industry use position papers to shape food choices and impact the public's nutritional status.

Position papers are available to Academy members, health professionals and the public on the Academy's website at no charge and are published in the Journal of the Academy of Nutrition and Dietetics. Below is an index of current Academy position papers.

**Food, Nutrients and Ingredients**
- Functional Foods
- Nutrient Supplementation
- Use of Nutritive and Nonnutritive Sweeteners

**Management of Food and Nutrition Systems**
- Benchmarks for Nutrition Programs in Child Care
- Child and Adolescent Nutrition Assistance Programs
- Comprehensive School Nutrition Services, a joint position of the American Dietetic Association, School Nutrition Association and Society for Nutrition Education
- Local Support for Nutrition Integrity in Schools

**Health Promotion/Disease Prevention**
- Dietary Fatty Acids
- Health Implications of Dietary Fiber
- The Impact of Fluoride on Health
- Oral Health and Nutrition *
- The Role of Nutrition in Health Promotion and Chronic Disease Prevention *
- Total Diet Approach to Healthy Eating
- Vegetarian Diets

**Medical Nutrition Therapy**
- Ethical and Legal Issues in Nutrition, Hydration and Feeding *
- Interventions for the Prevention and Treatment of Pediatric Overweight and Obesity
- Integration of Medical Nutrition Therapy and Pharmacotherapy
- Nutritional Genomics
- Nutrition Intervention and Human Immunodeficiency Virus Infection
- Nutrition Intervention in the Treatment of Eating Disorders *
- Nutrition Services for Individuals with Intellectual and Developmental Disabilities and Special Health Care Needs
- Weight Management
Nutrition and Physical Activity
- **Nutrition and Athletic Performance**
- Nutrition Through the Lifecycle
- **Food and Nutrition Programs for Community-Residing Older Adults**, a joint position of the American Dietetic Association, American Society for Nutrition and Society for Nutrition Education
- **Food and Nutrition for Older Adults: Promoting Health and Wellness**
- **Individualized Nutrition Approaches for Older Adults in Health Care Communities** *
- **Nutrition and Lifestyle for a Healthy Pregnancy Outcome** *
- **Nutrition Guidance for Healthy Children Ages 2 to 11 Years**
- **Obesity, Reproduction and Pregnancy Outcomes**
- **Promoting and Supporting Breastfeeding** *
- Management of Sustainable, Resilient and Healthy Food and Water Systems
- **Agriculture and Food Biotechnology**
- **Food and Water Safety**
- **Food Insecurity in the United States**
- **Nutrition Security in Developing Nations: Sustainable Food, Water and Health**
  *Indicates Practice Paper on the same topic
- Position Papers by Other Associations Adopted by the Academy
- Partnership for Health in Aging (PHA)
  - **Partnership for Health in Aging Position Statement**
  - **Interdisciplinary Team Training in Geriatrics: An Essential Component of Quality Healthcare for Older Adults** *(Abstract* from Academy)
- American Society of Parenteral and Enteral Nutrition (ASPEN)
  - Parenteral Nutrition Glutamine Supplementation
  - Clinical Role for Alternative Intravenous Fat Emulsions
  - Joint Position Papers by the Academy and Other Professional Associations
- **Diabetes Self-Management Education and Support in Type 2 Diabetes** — Joint Position Statement of the American Diabetes Association, the American Association of Diabetes Educators and the Academy of Nutrition and Dietetics
- **Comprehensive School Nutrition Services** — Joint Position of the American Dietetic Association, School Nutrition Association and Society for Nutrition Education
- **Food and Nutrition Programs for Community-Residing Older Adults** — Joint Position of the American Dietetic Association, American Society for Nutrition and Society for Nutrition Education
- **Nutrition and Athletic Performance** — Joint Position of the American Dietetic Association, Dietitians of Canada and American College of Sports Medicine
- **Obesity, Reproduction and Pregnancy Outcomes** — Joint Position of the American Dietetic Association and American Society for Nutrition
## Appendix 4: Sample Dietary Guidelines Analysis

### Sponsorship Information – Food and Beverage Products

<table>
<thead>
<tr>
<th>Company:_________________ Date:___________________________</th>
<th>#1</th>
<th>#2</th>
<th>#3</th>
<th>#4</th>
<th>#5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand if applicable</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Name</th>
<th>Ingredient list</th>
<th>Serving size</th>
<th>Calories/serving</th>
<th>Artificial Trans Fat [gm]</th>
<th>Percent of Calories from Saturated Fat</th>
<th>P:S  Fat Ratio</th>
<th>Sodium [mg] per calorie</th>
<th>Percent of Calories from Added Sweeteners</th>
<th>Food Equivalents[^17] in any combination/100 Calories[^18]</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[If single whole food item such as egg, apple, brown rice, avocado list and stop here]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[^17]: 0.75 cup fruit equivalent (0.25 cup for dried fruit);
[^18]: 1 cup vegetable equivalent (0.75 cup for starchy vegetables);
[^19]: 0.75 cup dairy or dairy alternative equivalent;
[^20]: 1 ounce grain equivalent – ≥ 50% of all grains are whole grain or has a whole grain as the first ingredient;
[^21]: 1 ounce meat or meat alternative equivalent – includes egg, seafood, poultry, meat, legume, nuts or seeds; OR
[^22]: 0.75 tablespoon fat/oil.

If food or beverage product is less than 40 calories/serving do not need to calculate food equivalents.
Appendix 5: Sponsorship Approval Process

- **Initial Request**
  - CRT
  - Potential Sponsor

- **Request for Information Completed**
  - Application provides essential information regarding Sponsor "Relationship Request for Information" form is utilized

- **CRT completes Analysis document**
  - Analysis includes all pertinent details
  - Assessment Scoring Tool is utilized
  - Includes risk benefit analysis
  - CRT sends completed packet to the MSRC

- **MSRC completes scoresheet**
  - Acceptable total score moves project back to CRT for continued development and the rest of the steps in this flowchart are completed.
  - MSRC utilizes the "Assessment Scoring Tool" to evaluate the proposed collaboration.
  - Unacceptable total score ends process or returns to CRT for more information or modification

- **Project Development**
  - If Request is APPROVED, individual project with the sponsor is evaluated.
  - The Project application includes project proposal, budget, goals, value proposition, etc.

- **Review by E-Team & MSRC**
  - If both groups approve project moves forward
  - If one group disapproves, project is revised or ends

- **BOD Approval**
  - CRT develops signed letter of agreement

- **Communication Process Implemented**
  - Project Proceeds