

**Immune Deficiency Foundation (IDF)
Partner Relationship Statement**

*Approved by Executive Committee May 10, 2013
Approved by the Board of Trustees June 27, 2013
Revised January 2017
Board Approved Revisions February 3, 2017*

The Immune Deficiency Foundation (“IDF”) is the national not-for-profit patient organization dedicated to improving the diagnosis, treatment and quality of life of persons with primary immunodeficiency (PI) diseases through advocacy, education and research.

One of the ways that IDF advances its mission is by establishing working relationships with for-profit businesses and not-for-profit organizations that have objectives that complement IDF’s mission. The working relationships referenced herein are considered partnerships between IDF and the individual for-profit businesses and not-for-profit organizations for the purpose of advancing the IDF’s mission (“Partnerships”) and, within the parameters of each working relationship, the individual for-profit businesses or not-for-profit organizations is considered by IDF to be a “Partner”. Partnerships may include formal agreements (such as sponsorship) and informal working relationships. IDF will have written operating procedures that will guide IDF in the review and approval of Partner relationships.

IDF has specific standards regarding how it interacts with Partners on an institutional level, as well as how IDF’s Board of Trustees, staff, and volunteers are to interact with representatives from Partners providing a product or service to the IDF community. These standards ensure that IDF’s relationships with Partners support and are consistent with IDF’s mission, goals and priorities.

We ask that all parties adhere to the following guidelines to enable IDF to take advantage of Partner collaboration opportunities, while recognizing and avoiding any negative impact the relationship may have.

Criteria for Evaluating Partner Relationships

IDF will exercise independent judgment in its entire decision making process and in the implementation of any agreed upon activities related to the Partnership. Consideration should be taken to mitigate any risks when entering into the Partnership.

Partnerships will be pursued when they are of an appropriate, meaningful, mission related benefit and of low risk to IDF. All Partnerships will be consistent with IDF’s principles, policies and ethical standards. An ideal Partnership is beneficial to the Partner and IDF.

The Partnership adheres to all applicable federal, state and local laws and regulations.

The Partnership does not tarnish the public’s trust of IDF. IDF remains credible and continues to exhibit integrity throughout the relationship.

The nature of all materials released to the public containing any Partner information or evidence of the Partnership will contain accurate details. A reasonable person will understand the nature and scope of the Partnership.

IDF will not endorse any specific product or service as part of the Partnership . IDF does not endorse or promote any specific product or service over another product or service .

IDF will evaluate annually the total amount of Partner support received as a percentage of total revenue. The desired number of Partner sources of support is also evaluated. IDF desires to have a broad base of financial support.

IDF will not accept funding from Partner for paid advertisements of public policy initiatives.

When a Partner sponsors an IDF event, the support will be acknowledged in printed materials and at the event.

IDF events are intended to provide opportunities for the PI community to interact with Partners to learn more about the therapies, products and services made available to patients and families. IDF does not allow commercial activity involving the direct sale of Partner products and services or the offer and sale of unrelated products and services at its events.

Support from Partners is managed completely by IDF and is not contingent on potential or actual business for, or referrals to, the Partners.

IDF will limit, define and prohibit the access of Partner representatives to IDF programs when necessary.

Anyone who works for a Partner that provides a product or a service for the PI community may not attend networking opportunities exclusively for individuals with PI and their family members. If a Partner representative is also a patient with PI or a family member, they are first considered a representative of a Partner and cannot attend.

IDF will not share mailing or contact lists with Partners. All data collected by and stored within IDF's databases is considered proprietary information.

IDF will obtain a written agreement with the Partner for any Partnership or other activity in which either party is obligated to meet any terms or conditions. The written agreement should indicate the financial contribution, what the contribution is intended for (unrestricted or for a specific activity), how IDF's name, logo, etc. will be used by the Partner and how IDF may use the Partner's name, logo, etc. the IDF Logo, THINK ZEBRA! logo and program logos are the intellectual property of IDF and may not be used by other organizations unless given prior approval by IDF.

IDF is fully accountable for the financial management, any necessary program monitoring and any evaluations of programs activities or surveys. IDF will also disclose to the public its contributors and their contributions through the IDF annual report, which will be available on the IDF website within six months of the close of IDF's fiscal year.

IDF has specific written guidelines and standards that protect the privacy of all participants of IDF Partner sponsored activities and programs. Please see IDF Exhibitor Guidelines (Addendum 1) and Volunteer Guidelines (Addendum 2) statements.