

System wide Promotional Policy

October 2022

System-wide Policy	Title: Promotional Item Purchase Policy
Issuing Department: Corporate Compliance & Privacy Department	Effective Date: October 22
IMPORTANT NOTICE: The official version of this policy is contained in the Policy and Procedure Manager (PPM) and may have been revised since the document was printed.	

I. Purpose

Tufts Medicine is unified under one name and the changes that we are making in healthcare to reimagine healthcare and support our communities. Our boldness, our heart and courage to see things differently will allow us to see healthcare differently. We understand that learning and innovation, teams and our people can drive meaningful connections and change. Our brand represents that vision and connectedness to our community. Therefore, everything we provide as a representation of that brand promise must uphold that unification, our system values and our mission and vision.

A. Promotional Items:

Tufts Medicine recognizes that many employees engage in events, activities and team recognition that will promote the system to the community, help us recruit much needed team members, help shape company culture, foster a sense of community, create brand ambassadors, and create opportunities for learning and development. The right promotional products are a way to ensure the brand is portrayed in a professional, effective and cost effective manner.

B: Promotional item store:

II. Scope

This policy applies to all Tufts Medicine employees, professional staff members and affiliates.



III. Definitions

Term	Definition
Promotional Items	Refers to any item that carries the logo to promotes the brand, or corporate identity. Examples of such products are hats, pens, shirts, badge pulls, lanyard, jackets, magnets, awards, coffee mug, tumblers, water bottle, lunch bag/box, etc.
Online Store/ Pop-up Store	Online ordering website that has limited items for quick, easy ordering
Economies of Scale	Economies of scale are cost advantages when production becomes efficient, as costs can be spread over a larger amount of goods.
Bulk Ordering	Bulk ordering is when one <i>buys</i> a large quantity of goods at once. This may occur at either the retail or the <i>wholesale</i> levels. When these items are ordered in bulk and then stored it allows for individual or less than price break quantities to be ordered at bulk rates.
Approved Vendor	Vendor has gone through a vetting process and has demonstrated they are a good steward of our brand promise. They have agreed to uphold our brand guidelines. This vendor is approved by the Marketing & Communications and Purchasing departments. They must have completed the new vendor form and provided proper paperwork to purchasing.

**IV. Policy
Promotional Item Ordering**

A. Policy overview

Tufts Medicine has contracted with a preferred promotional vendor that will order ALL branded items. This vendor has pre-approved items on an online store for easy ordering. This allows the organization to offer bulk pricing on items at any quantity. Only items designated as an approved item can be ordered. If there is an item needed that is not on the site, a special request to the Marketing & Communications department can be made to potentially add that item at a later date if it meets all brand criteria. The vendor accepts credit cards, PO numbers and cost centers for payment. **Note guidelines below for payment by PO or Cost Centers.**

B. The do's and don't of promotional items:

Do's:	Don'ts:
The merchandise that is offered is in support of and reflects our brand promise	We won't offer promotional merchandise that contradicts our brand.
The promo items offered reflect our mission and vision.	We won't allow for unbridled personalization on items. Guidelines restrict personalization on items. The Marketing & Communications department will evaluate situations that may be deemed appropriate on a case-by-case basis.
The promo items offered reinforce our values of one team, respect, inclusion, heart, courage and excellence.	There's a difference between "inexpensive/valued priced" and "cheap"— low-quality items are not offered.
The Marketing & Communications department will provide an opportunity for customization when appropriate.	Branding on any item is not offered just because the vendor says it is a "hot item"
We will offer usable and practical items that can be used both at work and in an individual's personal life. The portfolio of items will be analyzed on a monthly basis and optimized based on demand and critical business needs.	Ideas or requests for items not included in the merchandise shop must be presented for review and approval by the Marketing & Communications department by completing a request form.

A. Here are examples of promotional merchandise categories that are NOT on brand for Tufts Medicine:

- *Unhealthy consumables/accessories*
 - Soda or sugary drinks
 - Alcohol, drink koozies, bottle openers, etc.
 - Disposable plates or serving ware
- *Functional medical devices associated with illness/injury*
 - Boots, crutches, ace bandages
 - Syringes or pill bottles that could be misinterpreted
- *Items that are not relevant to our organization or don't reinforce our purpose and equity goals*
 - Luxury sport items
 - Boat/sailing/yacht equipment

B. Customization should be limited to specific situations and items

- *Customization is appropriate for:*
 - Event specific items (e.g. Custom t-shirts for a walk)
 - Tufts Medicine major entities
 - Minor entities (using the correct text treatment and clear space)

C. Ordering from non-approved vendors is prohibited

Ordering from a vendor that is not approved by the Marketing & Communications department is not permitted. We have negotiated a rebate with one vendor, Geiger. All purchases should be made thru Geiger.

D. Obtaining a logo without permission is prohibited

The Tufts Medicine name and logo marks are owned assets of Tufts Medicine and may not be used without permission.

No one can cut/paste, recreate or manipulate a system logo in any fashion, for any reason. The logos created for and by Tufts Medicine are service marks (trademarked) of the brand. Using them without the strict permission of a marketing team member will be a violation of system policy. You may be held liable for the cost of any item produced in violation of this policy and/or the hours accumulated to retrieve items.

E. Paying for items

Items can be purchased by budgeted department funding (via PO or cost center) for organizational use if they are being used to meet the strategic initiatives of the organization. These events include: job fairs and recruitment, sponsored community events, volunteer services, approved marketing initiatives, some patient education initiatives, development/fundraising, special leadership initiatives, onboarding of new employees or residents/fellows, patient experience initiatives, etc. Anything not mentioned will need approval by the Marketing & Communications department.

Any order over the cost of \$500.00 that is being paid with organizational or physician organization funds must be approved by the Marketing & Communications department in advance. The marketing and communications lead may elevate the purchase to the local VP or President if needed.

All other items and gifts can be purchased using personal funds via credit card.

If you need clarification of any aspect of this policy, contact the Compliance
Compliance@tuftsmedicalcenter.org

V. Related Documents

Brand guideline found on Eva
Special request form found on vendor online store