

Pallium Legacy Management Vehicle Report: Recommendations

Note: At the request of the Pallium Executive Management Committee, these recommendations have been pulled out of the Final Report for the Legacy Management Vehicle Initiative. While a list of recommendations in one place is an understandable convenience, the reader is cautioned about reviewing the recommendations without reference to the specific text that develops each of them in the final report. This caution is intended to reduce the likelihood that the recommendations be taken out of context, or that their strategic utility for the overall goals of Pallium and the Legacy Management Vehicle Initiatives would be underappreciated. To further encourage the reader to refer to the larger document for consideration of the recommendations, they appear here in their exact language in the text of the final report.

- 1. As a result, in our view, we cannot recommend the status quo as likely to result in the development of a legacy from the Pallium Project.**
- 2. As a result, it is our RECOMMENDATION that the Pallium Project consider incorporation as the preferred form in order to establish a legacy management vehicle.**
- 3. As a result, it is our RECOMMENDATION that the Pallium Project consider operating on a not-for-profit basis and seek incorporation of a not-for-profit legacy management vehicle.**
- 4. It is our RECOMMENDATION that the Pallium Project review in more detail its eligibility to secure registration and operate as a registered charity.**
- 5. It is our RECOMMENDATION that the Pallium Project consider seeking to register either the legacy management vehicle and/or a second fundraising entity (e.g. a Pallium Foundation) it may seek to establish as registered charities.**
- 6. It is recommended that each of the above and all other relationships between the Stakeholders and the Pallium Project should be clear, well understood by all parties and documented in order to avoid misunderstanding and to support the accountability framework desired by the Stakeholders.**
- 7. It is recommended that the Stakeholders and the Pallium Project should have a candid discussion about and establish a viable economic basis for the development of educational, research and practice materials that are made available to the Stakeholders.**
- 8. It is recommended that Pallium review the scope of its proposed activities and consider the extent to which “other business” it may wish to carry on might affect its desire for registered charitable status.**
- 9. It is recommended that the Pallium Project should establish an intellectual property strategy that supports the long-term economic basis for the continued development of educational, research and practice materials that are made available to the Stakeholders.**

10. It is recommended that the Stakeholders and the Pallium Project should have a candid discussion about Stakeholder use and access of Program Intellectual Property and document that agreement among all Stakeholders.

11. It is recommended that the Pallium Project should develop internal policies and practice to:

- (a) maximize its ability to recognize and protect program Intellectual Property,**
- (b) identify and address third party infringement and**
- (c) reduce the risks of violation or infringement of the rights of others.**

12. It is recommended that the Pallium Project put in place agreements, policies and other documentation in order to clearly, effectively and efficiently manage and control Program Intellectual Property

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