

**CALIFORNIA SOCIETY FOR
HEALTHCARE
RISK MANAGERS (CSHRM)**

**BOARD OF DIRECTORS
POLICY AND PROCEDURE**

SPONSORSHIP

**CALIFORNIA SOCIETY FOR HEALTHCARE
RISK MANAGERS (CSHRM)**

**BOARD OF DIRECTORS
POLICY AND PROCEDURE**

TITLE: Sponsor Management	COMMITTEE: Chapter Management
	AUTHOR: Peggy Nakamura (10/92) Stephanie Turner (10/98)
	NUMBER: S-1
	DATE: October 1998
	REVIEWED/REVISED: August 2003

POLICY:

It is the policy of the Board of Directors of CSHRM to assure that support for education opportunities is obtained in a manner that is fair, equitable and contributes to the goals of CSHRM. Support accepted by the Society includes financial donations, sponsorship of education units, exhibitors and direct financial sponsorship of designated events. Recognition of sponsors will be permitted within the scope of the following procedures.

PROCEDURE:

I. Board Commitment and Responsibilities

The Board shall appoint one Board member to coordinate all sponsor activities. The responsibilities of the Board member shall be to assure sponsors are recruited, guidelines for recognition are followed, sponsors are communicated within a timely manner and the Board is kept current on all sponsor activities. Other Board members and CSHRM members can be recruited to assist with the function. The focus of efforts shall be on sponsors for the annual conference.

II. Sponsor Recruitment

Sponsors shall be recruited from all segments of the healthcare industry with a focus on Northern California. The market segments most commonly interested in supporting the goals of CSHRM include law firms, insurance brokers and carriers, and risk management specialists, consultants and healthcare providers. Exhibitors may be solicited from any areas pertaining to healthcare risk or safety. There will be no geographic restrictions on exhibitors.

Sponsorship of Bridges programs shall be determined individually for each program. Recruitment shall be targeted first towards businesses who were unable to donate to the annual meeting and/or, the entity hosting the program.

A. *Bridges programs:*

1. Solicit support through phone calls to a list of designated businesses until the dollar budget is reached.
2. Send letter-confirming amount of donation and information regarding the program.
3. Send copy of brochure showing sponsor.
4. Send thank you note within two weeks of receiving donation.
5. Sponsorship Chair will notify the Education Chair to assure all sponsors receive a conference brochure.

B. *Annual meeting:*

1. End of October: Letters inviting sponsors to participate shall be sent the by the end of October. Letters shall recognize previous sponsors vs. new sponsors.
2. Beginning of December: Second letter shall be sent to non-responders. (A non-responder is defined as not responding with a yes or no to a solicitation. It does not mean not wanting to donate.)
3. The beginning of December: A list of sponsors meeting the guidelines for recognition in the annual conference brochure shall be provided to the Education Committee Chairman by the Board Sponsor Coordinator. The sponsorship list from the previous year will be used and any new contributors committed by Dec. 5th. will be added.
4. Receipt of Printed Brochures: All sponsors shall receive a copy of the brochure as soon as received from the printer. (See template letter.)
The Sponsorship Chair will notify the Education Chair to assure all sponsors receive a conference brochure.
5. Beginning of January: Phone calls will be made to previous sponsors who have not yet pledged and those who have not submitted information about their firm or company. Information about sponsors will be submitted to the Education Chair for inclusion in the annual meeting syllabus.
6. Pre-Conference: A final list of sponsors and amounts will be prepared for the Education Committee. Recognition posters for the annual meeting will be ordered.
7. Post-Conference: All sponsors shall receive a thank-you letter within one month of the conclusion of the conference.

III. Sponsor Recognition

Sponsors shall be recognized according to the following guidelines. Deviations are discouraged but can be used if appropriate and discussed between the Board and the President. Sponsors not meeting the category requirements for selecting a function to sponsor may do so if there is a history of support for that activity.

Bridges programs

All sponsors shall have the following:

1. Name in syllabus
2. Verbal recognition at beginning of program

A. Annual Conference

All sponsors shall have (1) their name on the brochure (if the pledge is received by December 5); (2) verbal recognition at the beginning of the annual conference; and, (3) the name of their firm or business, and if they choose, six to eight lines about their firm or company added to the annual conference syllabus.

Exhibitor

For a \$250.00 donation, your promotional products, (Pens, note pads, gadgets etc) are inserted into a conference bag, by CSHRM staff. These bags are distributed to all conference participants.

For a \$500.00 donation, a table for exhibits during and after the annual conference is made available. A side room will also be available for larger equipment or demonstrations if arrangements requested.

- Sponsorship**
- 1. \$100-\$999:** Ribbon and name on poster,
 - 2. \$1,000-\$1,499:** Same as # 1 plus your promotional items put into the conference bag,
 - 3. \$1,500 - \$2,999:** Same as #2 plus your company or firm will be presented in the CSHRM e-journal and posted on the CSHRM website for the entire year. The company or firm will also be invited to attend the President's reception.
 - 4. \$3,000 and above:** Same as #3 plus free exhibit table during the President's reception.

C. Cross check with the Sponsor Coordinator

1. Bridges programs: The education program coordinator shall check with the Board coordinator and Treasurer to assure funds have been received/committed.
2. Annual Conference: The Treasurer shall notify the Board coordinator every two weeks between January and the annual conference of the status of moneys received. The Board Coordinator shall contact any committed sponsors with missing checks following a post conference review by the Treasurer.
3. Companies making written or verbal commitments to participate as a sponsor and not providing funds by the end of the fiscal year shall receive no future recognition until payment is made.

CROSS-REFERENCE: None.

California Society for Healthcare Risk Management
Conference Exhibit Space Contract

1. **Assignment of Exhibit Space:** Space shall be assigned by CSHRM.
2. **Hospitality, Suites, Demonstrations, Etc.** Exhibitor agrees not to host or schedule outside the exhibition area any activities for conference attendees during the hours of the conference.
3. **Fire Safety and Health:** Exhibitor assumes all responsibility for complying with local, city and state ordinances and regulations covering fire safety and health. All exhibit equipment and materials will be reasonably located within the exhibit space. Exhibitor will take necessary fire precautions.
4. **Moving Pictures, Music, Sound Equipment and Lighting:** Moving pictures, music and sound devices and lighting are not allowed.
5. **Conduct of Exhibitors:** CSHRM reserves the right to restrict the operation of, or evict completely, any exhibit which, in the sole opinion of the CSHRM Board, detracts from the general character of the exhibition as a whole. This applies to displays, advertising matter, souvenirs, door prizes, conduct of persons, etc.
6. **Storage, Boxes, Equipment:** CSHRM assumes no responsibility for damage to or loss of packing boxes or equipment.
7. **Food and Beverages:** Exhibitor may only distribute food and beverages for consumption with the permission of hotel management. Any food or refreshment distributed or consumed by Exhibitor shall, at Exhibitor's risk and expense, comply with all applicable federal, state and local sanitary and safety laws and regulations.
8. **Unoccupied Space:** Exhibitor is liable for full payment.

9. **Liability:** Exhibitor agrees to protect, save and hold CSHRM, the hotel and all agents and employees thereof (hereinafter collectively called Indemnitees) forever harmless for any damage or charges imposed for any violations of any laws or ordinances whether occasioned by negligence of Exhibitor or those holding under exhibitor. Further Exhibitor's property or lost revenue and Exhibitor is solely responsible for obtaining such insurance

10. **Fulfillment of Contract:** In case the hotel is damaged or destroyed by fire, the elements or any other cause, or if circumstances make it impossible for CSHRM to permit Exhibitor to occupy the space assigned during the period contracted. CSHRM and the hotel will not be liable for fulfilling this contract as to the delivery of space and Exhibitor will be reimbursed a proportionate share of the exhibit space rental fee.

11. **Payment and Cancellation:** Full payment of exhibit space fee must be made on or before February 1, 2003. Should Exhibitor fail to comply with this requirement, CSHRM has authority to reassign any or all space assigned to Exhibitor. Cancellations prior to February 1, 2003 shall be refunded at 100% of the amount payable, less a \$50.00 processing fee. Any exhibitor canceling after February 1, 2003 is liable for full payment at the contracted price of \$500.00.

12. **Breach of Agreement:** Any breach of this agreement by exhibitor may result is Exhibitor being excluded from future events organized by CSHRM and the forfeit of any post-conference information, such as attendee lists.

13. **Conference Management:** The exhibition is managed by California Society for Healthcare Risk Management, PMB 34, 120 Village Square, Orinda, Ca 94563. All matters not covered in this contract are subject to the decision of CSHRM and Exhibitor must abide by such decisions.
I have read and understand the terms and conditions of this exhibit space contract:

Signature: _____

Print Name: _____

Date: _____



California Society for Healthcare Risk Management

120 Village Square, PMB 34
Orinda, CA 94563

Dear Prospective Sponsor or Exhibitor:

On behalf of the California Society for Healthcare Risk Management (CSHRM), I would like to offer you the opportunity to sponsor and or participate in our annual conference March 5th and 6th, 2003 at the Holiday Inn, in Emeryville Calif.

This year's conference is "Shooting the Rapids", Managing Risk in a Changing Environment. Topics and Speakers will include:

Dan O'Connell Ph.D. - Bayer Institute - Workshop- "Disclosing Unanticipated Adverse Outcomes and Medical Errors"
Susan Penny - Legal Counsel CMA - Trends in Healthcare Legal Environment
Dr. Larry Veltman, MD OB/GYN – "Apology" from a Physician's Perspective
Mark A. Kadzielski – Attorney – Fulbright & Jaworski L.L.P. "Disruptive Physicians"
M. Steve Lipton, Esq. -Davis Wright and Tremaine - EMTALA Update
Mark Cohen –Risk Management Consultant- Sutter Health – Legal Update

CSHRM's mission is to advance the development and role of risk management within the healthcare industry. Since its inception, CSHRM has committed itself to addressing the needs of its members and affiliates throughout California and neighboring states. Your participation allows us to provide affordable educational programs.

This year we have the space available to invite exhibitors to the conference. Exhibitor tables will be available for presentation of your products or service for a \$500 donation. Participants will be able to visit from 5pm to 9pm on March 5th, during and after the Presidents Reception.

We anticipate 125 attendees; participants are Healthcare Lawyers, Insurers, Consultants and Healthcare Risk Managers. This is an important opportunity to network face to face with leaders in the risk management field. The following are opportunities available:

Exhibitor

For a \$250.00 donation, your promotional products, (Pens, note pads, gadgets etc) are inserted into a conference bag, by CSHRM staff. These bags are distributed to all conference participants.

For a \$500.00 donation, a table for exhibits during and after the President's reception on March 5th, 2003 is made available. A side room will also be available for larger equipment or demonstrations if arrangements requested by Dec. 31, 2002.

Sponsorship: Donation of:

Silver Circle:

\$100-\$999: Ribbon and name on any posters

Gold Circle:

\$1000 - \$1499: Same as # 1, plus, your promotional items put into the conference bag,

Platinum Circle:

\$1500 - \$2999 Same as # 2, plus your company or firm will be presented in the CSHRM newsletter for the entire year.

Diamond Circle:

\$3000 and above: Same as #3, plus a free exhibit table during the president's reception.

A registration form is enclosed, please note participation cut off dates, as our sponsorship space is limited. Please make checks payable to CSHRM. Mailing address: Sponsorship, CSHRM, PMB 34, 120 Village Square, Orinda, Ca 94563.

If you have specific questions, feel free to call me at SPONSORSHIP CHAIR PHONE or email me at SPONSORSHIP CHAIR EMAIL.

I am looking forward to meeting you at the conference.

Thank you in advance for considering this opportunity.

CSHRM - Sponsorship Chair



California Society for Healthcare Risk Management
120 Village Square, PMB 34
Orinda, CA 94563

It is not too late, to still be an exhibitor for the California Society for Healthcare Risk Management's Annual Conference, March 5th, 2003 in Emeryville, California. CSHRM needs your support for a successful conference.

Please fax or email us your intent to support this worthwhile Educational Conference.

Yes, I will be a Exhibitor for \$500.00 _____

No, I cannot be an Exhibitor, but I am sending promotional items for the conference bag. (item)_____ for a donation of \$250.00.

Company Name _____

Contact Name: _____ Tele: _____

Email: _____

Six to Eight lines to be included in the conference syllabus about your firm/company.

Complete the above information and fax to _____ or email
_____ Questions, please call _____. Your support is truly appreciated.

4. **Diamond Circle:** \$1500 - \$2999 Same as # 2, plus your company or firm will be presented in the CSHRM newsletter for the entire year.

\$3000 and above: Same as #3, plus a free exhibit table during the president's reception.

You may email your intent to exhibit or sponsor to _____.

Your support is truly Valued.

January 13, 2003

CSHRM is a non-profit organization whose mission is to advance the development and role of healthcare risk management, which is done primarily through education and communication. The organization has been able to consistently provide outstanding educational programs, in large part due to the generosity of our sponsors.

As a valued past sponsor of the California Society for Healthcare Risk Management (CSHRM), I would like to give you the opportunity to sponsor the 2003 Annual CSHRM Education Program and Annual Business Meeting.

Our up coming program will be held at the Holiday Inn, in Emeryville, Ca., on March 5th and 6th, 2003. "Shooting the Rapids", Managing Risk in a Changing Environment will include:

Dan O'Connell Ph.D. - Bayer Institute - Workshop- "Disclosing Unanticipated Adverse Outcomes and Medical Errors"

Susan Penny - Legal Counsel CMA - Trends in Healthcare Legal Environment

Dr. Larry Veltman, MD OB/GYN – "Apology" from a Physician's Perspective

Mark A. Kadzielski – Attorney – Fulbright & Jaworski L.L.P. "Disruptive Physicians"

M. Steve Lipton, Esq. -Davis Wright and Tremaine - EMTALA update

Mark Cohen –Risk Management Consultant- Sutter Health - Legal Update

Your donation is truly appreciated and will be recognized in many ways, including listing your company or firm name on the conference brochure, recognition at the conference and acknowledgment in the CSHRM newsletter. An outline of our sponsor recognition program is enclosed. Please have checks made payable to CSHRM. A self-addressed, stamped envelope is enclosed for your convenience. (Important: Please note on your check that this is a donation.) Your company or firm name will be listed on the conference brochure if the check is received prior to December 31.

Please note that this year for a \$250.00 donation, your promotional products, (Pens, note pads, gadgets etc) are inserted into a conference bag, by CSHRM staff. These bags are distributed to all conference participants. If you prefer for a \$500.00 donation, a table for exhibits during and after the President's reception on March 5th, 2003 is made available. A side room will also be available for larger equipment or demonstrations if arrangements requested by Dec. 31, 2002. We are glad that we can now allow our sponsors more contact with the conference attendees.

Thank you in advance for your continued support. If you have any questions concerning sponsorship, do not hesitate to contact me. SPONSORSHIP CHAIR NAME, PHONE or email at _____.

Yours truly,

NAME

CSHRM - Sponsorship Chair

cc: Sponsorship Committee

January 3, 2003

«FirstName»«LastName»
«Company»
«Address1»
«City», California «PostalCode»

Dear «FirstName»:

Thank you very much for sponsoring the upcoming 2003 Annual CSHRM Education Program and Annual Business Meeting. Our upcoming program “*Shooting the Rapids*” which will be held at the Holiday Inn – Bay Bridge, Emeryville, California on March 5th and 6th, 2003.

CSHRM has been able to consistently provide outstanding educational programs, in large part due to the generosity of sponsors, such as yourself. Your \$_____ donation is truly valued and will be recognized at the conference and acknowledged in the CSHRM newsletter.

As a sponsor, your company or firm name will be included in the conference syllabus. If you choose, six to eight lines about your company or firm can also be included. If you would like to take advantage of this opportunity, please submit your summary to me by February 18, 2003.

C. *Thank you for your continued support. If you have any questions concerning sponsorship, do not hesitate to contact us.*

Yours truly,

NAME, - Sponsorship Chair

Phone

Email

NAME – President

Phone

Email

cc: NAME - Education Chair

PHONE

Email



Invoice No.



Name _____ Date 05/08/2003
 Address _____
 City _____ State _____ ZIP _____
 Phone _____

Qty	Description		TOTAL
1	2003 Sponsorship for CSHRM Annual Conference		\$0.00
		SubTotal	\$0.00
		TOTAL	\$0.00

Check

Please make check payable to
CSHRM

Office Use Only

Make sure we have the information for the conference binder regarding your business by Feb. 11th, 2003. Please email to SPONSORSHIP CHAIR



*Thank you for Supporting
CSHRM*