



## FEI – ROCHESTER CHAPTER 2022-2023 Sponsorship Partner Program

The FEI Rochester Chapter (“Chapter”) Sponsorship Partner Program (“Program”) provides representatives of local companies (“Partners”) with the opportunity to participate in Chapter activities for mutually beneficial development of Chapter members and Partners. This document details the benefits, shared expectations, and guidelines of the Program.

**Purpose**

The Program has been designed with the purpose of building a robust membership base, supported by actively engaged Partners. A successful Program for the Chapter will provide enhanced offerings to members, while growing the actively engaged membership base. For Partners, a successful Program will create opportunities to connect with decision-making Chapter members in a variety of venues and give Partners greater access and visibility to Chapter members and activities.

**Sponsorship Partner Program Opportunities**

The Chapter currently offers two (2) levels of sponsorship; Strategic Partner and Executive Partner. A summary of benefits under each level is provided in the table below:

<b>Benefits</b>	<b>Strategic Partner</b>	<b>Executive Partner</b>
Annual Sponsorship Fee	\$3,000	\$6,000
Attendance at monthly meetings/events	Free admission for one (1) member of sponsor company per meeting/event	Free admission for up to two (2) members of sponsor company per meeting/event
Ability to bring guests to monthly meetings/events	One (1) guest per meeting; unlimited prospective members *	Up to two (2) guests per meeting; unlimited prospective members *
Recognition in FEI Member Directory and printed materials	Small logo and contact information	Featured listing with large logo and contact information
Recognition on FEI Rochester website	Small logo w/ link to sponsor’s website	Large logo w/ link to sponsor’s website
Opportunity to display/distribute sponsor literature and/or logo items	N/A	One (1) monthly meeting
Brief presentation on your Company	N/A	One (1) monthly meeting
Opportunity to present an after dinner professional development topic at a monthly meeting	Strategic Partners given priority over non-sponsors	Executive Partners given priority over Strategic Partners and non-sponsors
Student Scholarship Awards	N/A	One (1) named scholarship award
Exclusive by Industry	N/A	No more than three (3) sponsors from a single industry/specialty **

\* Attendance fee required for invited guests; prospective members, that meet National FEI membership requirements, may attend up to two (2) meetings at no charge.

\*\* Exclusivity does not apply to the Financial Leaders Awards Luncheon or the Rochester Chapter Golf Outing.

The term of this annual Sponsorship Partner Program runs from July 1, 2022 to June 30, 2023. The sponsorship fee payment is for the same annual time period, regardless of the date the payment is received. The payment will be prorated for new Partners that join after the program year has begun. Partner benefits may be curtailed at the discretion of the Chapter if sponsorship fees are not received on a timely basis.

#### **Additional Program Benefits for Partners**

1. Recognition through pre-meeting slide show, or other acceptable means, at meetings and professional development sessions.
2. Preferential opportunity to sponsor additional chapter events, including the Financial Leaders Awards, the Chapter's Annual Golf Outing, and other Chapter Socials.
3. Informational access only to Chapter Member Directory (no mailings allowed).
4. The opportunity to post one (1) appropriate article to the Chapter's LinkedIn site per quarter, or a total of four articles per fiscal year. The article will be featured for two weeks and will then be moved to an archived section of the Chapter's website for on-going reference.
5. As indicated in the chart above, preference to present a professional development (PD) topic at a monthly meeting. Presentations must meet New York State Continuing Professional Education (CPE) guidelines and cannot be a marketing or sales presentation. Up to two (2) additional Partner representatives may participate in the PD session and may attend the membership meeting on a complimentary basis. The PD session should educate the attendees on an accounting, business or leadership topic and showcase the skills and expertise of the Partner company.
6. Pre-approved educational mailings or emails to chapter members (complimentary if electronic or at the Partner's cost if regular mail) regarding programs and presentations offered by the Partner to their clients or general public. These programs must qualify for CPE credit under New York State CPE guidelines. The Chapter's Professional Development Committee will assist the Partner in meeting these CPE Program requirements.
7. Participation by a Partner representative on one of the following committees: Membership, Professional Development, Programming Development.

#### **Number of Partners**

There are practical limits to the number of Partners that the Chapter can manage at any one time. In addition, the Chapter would like to maintain an appropriate ratio of Partner attendees to member attendees. Based on expected growth in the member base, including the new members that Partners may help add, the Chapter will limit the total number of Partners at any given time to 25.

In addition, the Chapter desires to expose the membership to Partners in a variety of business categories. As such, the Chapter will have no more than three (3) Executive-level Partners in any similar business category at any one time. There will be no formal limits for Strategic-level Partners.

A Partner must be approved by a majority vote of the Board of Directors of the Chapter at a duly authorized meeting of the group.

#### **Guidelines for Partners**

1. Each Partner is asked to invite at least one (1) qualified guest to attend each Chapter meeting with the goal of helping to add three (3) new members to the Chapter by June 30, 2022. Partners that meet this goal will be provided a 10% discount off the follow year sponsorship fee payment. Chapter members may approach Partners to inquire about product and service offerings. There should be no proactive solicitation of Chapter members by Partners at Chapter meetings and events.
2. Partner representatives participating in Chapter activities must be at a senior level (i.e. at least at a level that would be expected to interact with Chapter members in connection with contracting for services).
3. All prospective member guests must meet FEI National membership criteria. Membership criteria will be provided for guidance.
4. All participation of the Partner in the activities of the Chapter, including any mailings, presentations, etc., are subject to approval by the Sponsorship Committee Chair or his/her designee and should be submitted sufficiently in advance to allow for proper review, discussion and adjustment. All mailings will be completed by the Chapter or an independent mailing service. Partners will not be provided direct access to the Chapter membership roster and mailing list for direct contact purposes.
5. The Chapter Board will not enter into exclusive arrangements with Partners.

6. The Chapter Board will appoint a Sponsorship Committee to oversee the Program and monitor the activities of the Partners, in conjunction with the Chapter Board, the Chapter Officers and the Chapter Administrator.
  - Formal annual agreements will be executed to clarify the terms of the Partnership.
  - Any suspected breach of these guidelines, the specific terms of the formal agreement, or of professional ethics or of any legal requirements applicable to the operations of the Partner may be brought to the attention of the Chair of the Sponsorship Committee and/or the Chapter Board by any Chapter member. After careful consideration, the Sponsorship Committee Chair will recommend a course of action to the Board, which may include immediate termination of the Partnership without refund, principally to ensure that any actual, or appearance of any, impropriety by a Partner does not reflect negatively on the Chapter. The good faith majority decision of the Board shall be conclusive and final.
7. A member of the Sponsorship Committee will meet with the lead representative of each Partner at least annually to review the status of, and mutual satisfaction with, the relationship.
8. The Sponsorship Committee will consider adjustments to the level of benefits and partnership fees on an ongoing basis, with a formal reconsideration annually in connection with agreement renewals. Changes to the level of benefits and fees will be approved by the Chapter Board.
9. Neither FEI National nor the Chapter will endorse any product or service of any Chapter Partner.

By

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FEI Rochester Chapter President

Dated \_\_\_\_\_

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Partner

Dated \_\_\_\_\_