

## **Canadian Chemistry Conference and Exhibition (CCCE) and Other Conference Sponsorship/Fundraising and Fund Distribution Guideline for Members**

For adoption in fiscal year 2022

To be in effect until changed by the NT with approval by the CSC Board

### **Abbreviations and Definitions**

CIC – The Chemical Institute of Canada

CIG – Common Interest Group; For simplicity, SDs, LSs, COCs, SOCs and MRGs will be collectively referred to as CIGs

COC– Conference Organizing Committee

CSC – Canadian Society for Chemistry

LS – Local Sections of the CIC/CSC

MRG – Member Resource Groups of the CIC/CSC

NT – National Team

SD – Subject Divisions of the CIC/CSC

SOC – Symposia Organizing Chair

### **1. Purpose and Objective**

This document is to provide the CSC membership and its associated Common Interest Groups (CIGs) and the CIC National Team (NT) with high-level guidelines in sponsorship and fundraising activities to support their respective conference symposia and other events organized by CSC/CIC NT and/or the CIG groups. It includes how the raised funds are used and how the surpluses, if any, are distributed.

The objective is that the NT and CIGs will work collaboratively to ensure adequate funds are raised for every organized conference and event in which the CSC membership participates. It is essential that an open and transparent process is established between the NT and CIGs.

### **2. Contacts at the CIC National Team**

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Xxxx: Executive Director, (will be added after the new director starts)

### **3. Sponsorship Guidelines**

- 3.1. Networking and relationship building are key for the success of sponsorship development. It is generally more successful to solicit sponsorship through established organization/corporate contacts either by the NT, CIC Board of Directors and CSC Board of Directors, conference organizing committee members, and/or by members of the CIGs than through untargeted cold calls or emails.
- 3.2. The NT maintains a list of historical sponsors with contacts to whom the NT would reach out each year to secure a certain level of commitment for future sponsorship and to strengthen the relationship between the sponsors and the respective societies (e.g. CSC).

The ownership of the contact list will reside with the NT. The NT may allow the Sponsorship Committee for each conference/event to access the contact list while abiding the Canada's Anti-spam Law and privacy requirements.

- 3.3. The NT and members of the CIGs are encouraged to reach out to prospective contacts of various organizations/corporates for sponsorship for the CCCE conferences, specific symposia and/or special events for CSC membership.
- 3.4. The NT and CIGs should coordinate the efforts to avoid unnecessary duplications, whenever possible. There will be no restrictions for CIGs to reach out to any organizations/corporates. The CIGs will communicate with the NT to share the names of organizations/corporates they have contacted and the outcomes of the sponsorships so that the NT is ready to provide any assistance as necessary to facilitate the process, e.g. issuing invoices, receiving funds and providing the successful sponsors with instructions for their next steps, including submitting logos and selection of exhibit booths (for high-tier sponsors) as defined in the sponsorship prospectus posted at the conference website.
- 3.5. The wills of the sponsors are to be respected. It is up to the sponsors to decide whether they want to sponsor a conference as a whole, or to sponsor a specific symposium/event. Some sponsors may take a hybrid approach, that is, to provide a total amount for the conference and then allocate specific amounts to various symposia/events. The sponsors, in general, will provide the NT with the list of symposia/events, the amount of funds for each symposium/event and the name(s) of the relevant contact person(s) (usually the organizing chairs for the symposia who contacted the prospective sponsors). The NT will coordinate with the chairs of the symposia or event organizing chairs to transfer the funds accordingly to each CIG (e.g. the treasurer or chair of an SD) on the list the specific symposium/event belongs to. The NT will also inform the sponsors that the funds have been allocated as instructed.
- 3.6. For the benefit of sponsors with regard to their sponsorship tiers (e.g. platinum/gold etc.) and appropriate recognitions at a conference/symposium/event, it is important to allow the sponsors to bundle the total sponsorship amount into one single payment to CIC, which is then distributed at the instruction of the sponsors.
- 3.7. Strategically, it would be beneficial for our membership if we (the NT and CIGs together) could establish long-term partnerships with certain sponsors.
- 3.8. After the event, the NT and Society or CIG will coordinate to ensure an appropriate appreciation is demonstrated to the donor by way of a thank-you letter, email or phone call. The sponsor will be invited to express whether they were satisfied with the experience of sponsoring the event and whether the CIC, Society or CIG could improve the experience in the future. This is an important element of maintaining and enhancing the relationship for future opportunities with the sponsor.

#### **4. Fund Collection, Distribution, Conference Surplus Allocation, and Handling of Deficit**

- 4.1. All funds committed by sponsors will be payable to the Chemical Institute of Canada, or in some cases (e.g. sponsor a SD's mixer), funds may be identified to go to the SDs directly if the sponsor(s) wishes to do so.
- 4.2. The sponsors will define the allocation of the amounts to the general conference and/or to specific symposium or symposia. The NT will distribute accordingly to the instructions given by the sponsors and the SD that organizes the symposia/events. If the symposia/events are not associated with any SDs, the funds will be managed by the NT.
- 4.3. The funds allocated to SDs and/or symposia may be provided by the NT to the SDs and/or symposia organizers through advancement or reimbursement as defined in the "Financial Management Process".

- 4.4. Each SD and/or symposium will reconcile its revenues and expenses at the end of the conference/event.
  - a. Any surplus from the sponsorship allocated to SDs will reside with the SDs.
  - b. For joint symposia, the organizers of the symposia will define the splits accordingly at their own discretions, either by the number of abstracts/presenters associated to respective SDs and/or by the amount of funding raised by people associated with respective SDs.
  - c. Any surplus from sponsorship allocated to symposia that are not associated with any SD will be part of the general conference revenue.
- 4.5. At the end of each conference/event, a reconciliation will be carried out to assess the financial status of the conference. If there is any surplus funding available from the conference general account, the surplus will be distributed to SDs using the current version of the Conference Revenue Sharing Formula calculated based on the number of abstracts and/or posters associated with specific SDs. The current agreed formula is: \$10,000 CAD is first taken from any surplus and given to the CSC as an “assumption of risk” reimbursement. Following that, the remaining surplus (if any) is split 50/34/16 to the CSC/Organizing Committee/SDs.
- 4.6. Each CIG shall guard the expenses for symposium/event according to its available funds in its account and fundraise for specific activity to ensure at least a balanced budget is achieved. For national CCCE, in rare occasions, e.g. recent pandemic that may affect registration/cancellation, a deficit may be incurred. Although the “contingency fund” established in the CCCE conference budget may be able to cover some of the deficit, if any, the excess deficit would be borne by the CSC and carried to the future years, hopefully it could be recovered through the “assumption of risk” fund mentioned above.

## 5. Use of Funds

- 5.1. There are three major sources of funds that support the conference: registration fees, exhibition booth sales and sponsorship funds.
- 5.2. These funds are used for the payment of the conference-related expenses:
  - a. conference website design and maintenance
  - b. facility, equipment, virtual/social platforms, abstract management software and programing supports
  - c. conference service operation management, e.g. catering, accommodation management, photography.
  - d. NT staff expenses including salary allocation commensurate with the relevant amount of time allocated to conference organization and management over a period of four years typically from a conference hosting city and facility are reserved to the conclusion of the conference.
  - e. registration waivers/travel expenses for plenary/keynote speakers
  - f. social events, including an opening reception, poster session receptions, coffee breaks, and award ceremony
  - g. SD mixers (typically through special sponsorship and also depending on the SDs revenues and financial health)
- 5.3. The organizing committee, with the approval of the CSC Board of Directors, will define how many waivers each symposium may receive for a specific conference.

## 6. Guidance for Sponsors

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Prepared by ZZ et al.

- 6.1. The NT, together with the CIC Board of Directors and the CSC Board of Directors will work together to define a “Guidance for Sponsors” package prior to each conference and event. This sponsorship prospectus guidance will be posted on the CIC conference website and will be used by the NT and CIGs to develop sponsorship and fundraising. The NT will ensure the consistency of this document is maintained year over year and make it available as soon as possible after the previous conference is complete and no later than the beginning of the next fiscal year.