



# NIRI Chicago Sponsor Guidelines 2022-2023

## Introduction

Welcome and thank you! We are delighted to have you and your firm as a sponsor. Your donation helps us provide educational, thought-provoking and insightful sessions for our members.

To ensure your sponsorship benefits NIRI Chicago and your organization, we developed the following sponsorship guidelines. Please feel free to contact us if you have any questions on these guidelines or about the sponsorship program in general.

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## Member Conduct

*Attendees are asked not to aggressively market products and services or aggressively seek employment at chapter meetings.*

NIRI's mission and goals focus on elevating the practice of investor relations, enhancing the stature of its members and meeting member needs. To that end, a key objective of the NIRI Chicago chapter is to provide educational and networking opportunities for members in a collegial, corporate environment. Those who seek to be better informed and raise their IR competency will find a warm reception.

Anyone sharing these goals is welcome to attend chapter meetings. We view the aggressive marketing one's services or products, or overtly seeking employment as inconsistent with these goals. This is true for service providers, counselors and sponsors as well as for regular members.

NIRI Chicago will make every effort to recognize sponsors as outlined in our sponsorship program material. Depending on the sponsorship level, this may include recognition on the NIRI Chicago website, in chapter newsletters, on program invitations and at the event itself. In addition, at some events and sponsorship levels, sponsors may make brochures and other marketing materials available. Sponsors should work closely with the sponsorship and event coordinators to ensure expectations are the same on all sides. NIRI Chicago does not allow sponsors to perform introductions, monopolize presentations or Q&A sessions, or aggressively promote their products.

If marketing or job-seeking behavior at chapter meetings becomes blatant or extreme, NIRI

Chicago will initially warn the individual or firm responsible. If the behavior continues following the warning, the chapter board of directors has the authority to bar the member or firm from future meetings or events.

### **Speaking or Providing Content at Chapter Meetings**

*Keep presentations and speeches general, rather than specific to a particular product. We do not provide speaking opportunities in exchange for sponsorship.*

NIRI Chicago conducts meetings on a wide variety of topics that are of interest to both experienced IROs and those new to the field. Therefore, we are always looking for good, informative and well-versed speakers who can address a topic broadly. If you or one of your employees is an expert in any particular area, or could add some insight on a particular topic, please let us know. If a potential speaker has presented at other NIRI chapter or National events, we may contact that chapter to gain a better understanding of the presentation and its success.

For each monthly program, the program chair is responsible for determining the appropriate speaker(s) or panelists. In some cases, in order to relate to IR practitioners better, this may result in the program chair preferring that a corporate client, rather than a service provider, speak. For each event, the program chair will clearly outline what should and should not be included in any presentation. It is important to note that we do not accept speakers who are prepared only to discuss a specific product or service.

Donations of services or sponsorship are considered mutually beneficial to the chapter and service provider. These donations are not given in exchange for a speaking or leadership opportunity, but rather for the real business benefit derived from increased visibility at chapter events.

NIRI Chicago will make every effort to recognize sponsors as outlined in our sponsorship program material. Depending on the sponsorship level, this may include recognition on the NIRI Chicago website, in chapter newsletters, on program invitations and at the event itself. In addition, at some events and sponsorship levels, sponsors may make brochures and other marketing materials available. We will not, however, “trade favors” or create opportunities for our sponsors that are not appropriate or go beyond the standard sponsorship agreements.

If you have a new product or service you would like to showcase, please contact us directly and we will provide suggestions for appropriate marketing venues.

### **Volunteering with NIRI Chicago**

*All members, including service providers, are welcome to become involved with NIRI Chicago.*

One of the benefits of NIRI membership is leadership opportunity. NIRI Chicago hopes members will become integrally involved with the chapter. Volunteering allows members to network, gain a better understanding of the investor relations profession and make new friends. There are opportunities, designed both to fit any schedule or time frame and to fit any interest areas:

- **Communications:** Help update the website, write or contribute to our *Member Connection* monthly e-newsletter, conduct media outreach and write news releases.
- **Membership:** Help recruit and welcome new members.
- **Programs:** Help develop educational events, including the monthly meetings, interactive breakfasts, mixers and/or special events.

- **Sponsorships:** Secure sponsorships to help defray the cost of chapter events.
- **IR Workshops:** Varied opportunities range from recruiting speakers to soliciting sponsors and exhibitors for mini- and/or full-day workshops as scheduled.
- **NIRI Chicago Board:** Make the most of your NIRI Chicago membership by getting involved – joining our chapter's leadership can lead to great networking, career development and educational opportunities.

We welcome volunteers for most roles. However, we may restrict certain positions to experienced investor relations practitioners, unless specific qualifications make an individual particularly well-suited for a given role. This ensures that our core mission remains unchanged, and should not be considered a reflection on any firm or individual.

### **Soliciting Members**

*Please respect member privacy. Do not solicit members directly without NIRI Chicago and/or member permission.*

We recognize that NIRI members may be a valuable prospect base for your organization. However, in order to foster a sense of collegiality among our members, we do not allow NIRI member databases to be shared outside of the chapter, nor do we allow our member lists to be sold or used in any way other than NIRI contact. In addition, email or telephone solicitations should not be made to individual members after a NIRI Chicago meeting or event.

Our members' contact information, including email, falls under the "CAN-SPAM" laws that prohibit unauthorized contact. If we learn of any such contact, we reserve the right to confiscate the member list and bar the member or member firm from all future meetings.

If you wish to advertise directly to NIRI Chicago members other than through a sponsorship, you may wish to contact NIRI National, which offers advertising opportunities through its publications.

### **Attendance Policy**

*Encourage your employees to attend, but not dominate, a meeting.*

Although NIRI Chicago is one of the largest NIRI chapters, attendance at any event may vary widely depending on the subject, date, time of day and other events in the broader market.

We believe that NIRI events should be a source of education and learning for all our members and associates. To that end, we ask that service providers limit the number of sales staff attending an event to three or four to avoid overwhelming some of the more sparsely attended events.

If you have a number of sales staff or employees that would benefit from attending a particular event, please notify the sponsorship coordinator in advance, so plans can be made to accommodate everyone.

### **For more information contact:**

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