

Association for Federal Enterprise Risk Management Annual Sponsorship Program: Sponsorship Guidelines and Conditions

Updated October 15, 2019

Part I: Corporate Sponsorships

The Association for Federal Enterprise Risk Management (AFERM) was established in 2009. We are the only professional association focused on promoting the application of enterprise risk management (ERM) principles and practices in government agencies toward improving the effectiveness of government programs, operations, and services. AFERM has over 600 members coming from backgrounds in a variety of public and private industries such as federal, state, and local government; financial and risk management services; public accounting; advisory and auditing; information technology; human resources; and higher education.

In serving its members, AFERM will conduct the following types of activities:

- Annual Federal ERM Summit, including plenary and workshop sessions, with Continuing Professional Education (CPE) units and discounted registration for AFERM members.
- Quarterly AFERM events with networking and presentations by senior level federal or private sector executives on ERM related topics, providing CPE units and registration discounts for AFERM members.
- Quarterly newsletter highlighting AFERM activities and thought leadership articles.
- AFERM website, offering ERM information and resources, and social media sites.
- Educational training for continuing professional development with discounts for AFERM members.
- AFERM Board of Directors (Board) and committee meetings; Corporate & Associates Advisory Group (CAAG) meetings.
- Emails informing members of AFERM news and upcoming events.

Sponsorship Partnering Opportunities

Organizations seeking to enhance their brand and increase their exposure within the ERM community can partner with AFERM to accomplish this objective. This can be achieved through our annual (12-month) sponsorship program that provides sponsors with a variety of options. The benefits of being involved with this sponsorship program vary depending upon the level of commitment.

Sponsorship Benefits

The information below contains a description of the specific benefits that AFERM sponsors will receive based on their respective sponsorship level. These benefits are illustrated in the Benefits Summary Matrix (Table 1) below.

AFERM Events

1. Exhibit Booth/Table – At the Annual Federal ERM Summit, sponsors at Platinum, Gold and Silver levels will be provided the opportunity to have an Exhibit Booth/Table to display promotional/marketing materials.
2. Logo Display – At the Annual Federal ERM Summit, AFERM will display sponsor logos in a prominent location for sponsors at Platinum, Gold, Silver and Bronze levels.

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3. Annual Federal ERM Summit Breakout Facilitation – At the Annual Federal ERM Summit, breakout sessions will be reserved for AFERM Platinum sponsors who will be provided the opportunity to suggest topics and formats for these sessions and serve as moderators.
4. Promotional / Marketing Materials – At AFERM events outside of the Annual Federal ERM Summit, sponsors at Platinum, Gold, Silver and Bronze levels will be provided the opportunity to place promotional / marketing materials at a table provided for such purpose.

Newsletters

1. Advertising Space – Silver level and above sponsors will be provided advertising space in the quarterly AFERM newsletter, with size of the ad space based upon the sponsor's level of commitment. Placement of the advertisements will be at the discretion of AFERM.
2. Company Name and Logo in AFERM Newsletters – Sponsors will be listed in AFERM newsletters, with order based upon level of sponsorship.

Website

1. Link to Sponsor Web Site from AFERM Web Site – Subject to individual sponsor desires, sponsor's logo and weblink will be included on the AFERM sponsorship program web page. Platinum sponsor logo and link will also be posted on the AFERM web site home page. Requirements for image dimension sizes for the AFERM website, publications, banners, and newsletters will be provided.

Corporate & Associates Advisory Group (CAAG)

1. Subject to the sponsor's desire to participate, the sponsor's overall contact for their sponsorship of AFERM or another individual designated by the sponsor will serve as a member of the AFERM CAAG.
2. The position of Chair of the CAAG will be rotated annually among Platinum level sponsors in the order of longest continuous sponsorship of AFERM. This rotation is subject to sponsor desires to provide someone to fill the position and also any extenuating circumstances (as determined by the AFERM President); e.g., a situation wherein the President and the CAAG Chair would be associated with the same sponsor company.

AFERM Sponsorship Guidelines and Conditions

The AFERM Board has approved the following guidelines and conditions for the Annual AFERM Sponsorship Program, with which each sponsor must agree and comply.

1. All sponsors must uphold the AFERM mission to support ERM objectives through the development, provision and promotion of information on best practices, research, standards and competencies.
2. AFERM does not condone aggressive and forceful marketing tactics by sponsors. While advertisements and promotions are a part of the sponsorship program, such activities should be conducted in a professional manner and in a way that is consistent with the AFERM mission. In addition, negative campaigning against competitors is not permitted nor accepted.

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3. Sponsors will not be provided AFERM member names or contact information. Communication with AFERM members will be distributed by the AFERM Board or AFERM Committee Chairs.
4. Upon request, sponsors will be provided a listing of individuals (including name, title, and organization) who participated in the Annual Federal ERM Summit; however, it will not include contact information, such as email address, phone number or home address.
5. Annual sponsorship commitments will be based upon either AFERM's fiscal year (October 1 - September 30) or another period agreed upon by the sponsor and AFERM and documented via email between AFERM and the sponsor or the invoice for payment, if applicable.
6. AFERM reserves the right to amend the sponsorship program at any time. All existing sponsors will be notified of such changes when they occur. Abuse of the program could result in termination of the sponsorship.
7. AFERM will ensure proper use of organizational logos and any other materials provided to AFERM by its sponsors.

Sponsorship Levels

1. Platinum Level Sponsorship — Annual Contribution: \$7,500.00
2. Gold Level Sponsorship — Annual Contribution: \$4,500.00
3. Silver Level Sponsorship — Annual Contribution: \$3,000.00
4. Bronze Level Sponsorship — Annual Contribution: \$1,500.00
5. Special Event Sponsorships — These will consist of one-time, fee-based sponsorships that arise on a periodic basis. AFERM may decide to seek sponsors for specific activities associated with events such as the Annual Federal ERM Summit (e.g., name badges, lunches, etc.), conferences, workshops, networking mixers, training, or other events where a one-time sponsorship would be offered. Details associated with these sponsorship opportunities will be determined by the AFERM Board.

Refer to additional detailed in Benefits Summary Matrix (Table 1) below.

Payment Policies

1. AFERM preferred method of payment is by credit card. ACH/wires or paper checks will be accepted on an exception basis. If ACH/wire is selected, the request for the IRS Form W-9 and sponsors request to complete their Direct Deposit form with AFERM banking information should be submitted to AFERM as soon as payment method is determined to expedite the payment process.
2. Renewals will be submitted 30 days prior to payment.

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Table 1: Corporate Sponsorship Benefits Summary Matrix				
Corporate Sponsorship Levels	Bronze	Silver	Gold	Platinum
Company logo displayed at Annual Federal ERM Summit / Association Meeting	YES	YES	YES	YES
Company name in AFERM quarterly newsletters as an AFERM Sponsor	YES	YES	YES	YES
Company logo and weblink on the AFERM website Sponsorship page	YES	YES	YES	YES
Opportunity to serve as a member of the Corporate & Associate Advisory Group (CAAG)	YES	YES	YES	YES
Booth or table at the Annual Federal ERM Summit (location preference to Platinum, then Gold, then Silver sponsors)	NO	YES	YES	YES
Advertising space in quarterly AFERM newsletters	NO	YES (1/4 page)	YES (1/2 page)	YES (full page)
Opportunity to include a representative on the Annual Federal ERM Summit Planning Committee	NO	NO	YES	YES
Opportunity to moderate a Breakout Session at the Annual Federal ERM Summit	NO	NO	NO	YES
Opportunity (on an annual rotational basis) to serve as Chair of the CAAG	NO	NO	NO	YES
Opportunity to display promotional / marketing / educational materials at AFERM-hosted events* (not including the Annual Federal ERM Summit)	YES	YES	YES	YES
Company logo and weblink on the AFERM website home page	NO	NO	NO	YES
Complementary AFERM annual individual memberships	2	4	6	10

*Method for distributing materials will be determined on an event-by-event basis by AFERM.

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Part II: Education and Professional Development Associates (NEW Sponsorship Type)

AFERM values the support from educational institutions, associations, and non-profit organizations that can help AFERM develop and/or provide its members access to high-quality educational, training, and professional development opportunities focused on or related to the practice of ERM which may include workshops, seminars, webinars, thought leadership, research, certification programs, etc.

There is no fee to become an AFERM Education and Professional Development (EPD) Associate; however, interested entities will be required to execute a Letter of Agreement (LOA) with AFERM outlining the specific types of offerings and services they plan to provide for AFERM members (refer to sample LOA herein on pg. 7). The LOA will be renewable annually, subject to termination for convenience by either entity upon written notification.

The AFERM Sponsorship Guidelines and Conditions outlined in Part I apply to EPD Associates. EPD Associates also receive the following benefits:

- Organization logo displayed at Annual Federal ERM Summit. The method for displaying the logo will be determined by the AFERM Summit Chair.
- Organization name in quarterly AFERM newsletters as an EPD Associate partner.
- Organization logo and link on the AFERM website Sponsorship page.
- Opportunity to serve as a member of the CAAG.
- Opportunity to provide informational materials (e.g., flyer, brochure, pamphlet) and/or promotional materials at the Annual Federal ERM Summit. The method for distributing the materials will be determined by AFERM.

If space is available, and at the discretion of the AFERM Summit Chair based on the level of service and support provided to AFERM, EPD Associates may be offered exhibit space (booth or table) at the Annual Federal ERM Summit at a reduced rate.

Note: For-Profit Education and Training firms / organizations are eligible for Corporate Sponsorship. They are not eligible for an EPD Associate sponsorship.

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Part III: ERM Community Partners (NEW Sponsorship Type)

AFERM is part of a broader community of professional associations and organizations focused on improving the efficiency and effectiveness of government. AFERM's ability to successfully promote the practice of ERM in government and increase the level of knowledge, awareness and support of ERM among public sector employees, managers, and stakeholders can be enhanced by engaging with this broader community.

ERM Community Partners are those organizations that see a mutually beneficial opportunity to establish a cooperative working relationship with AFERM in recognition of the beneficial outcomes that can be gained in support of their overall mission and goals. ERM Community Partners and AFERM will explore opportunities to promote awareness in each other's activities and services; jointly sponsor meetings, seminars and workshops; support and/or jointly undertake research projects or produce thought leadership; etc. AFERM will convene a meeting of its ERM Community Partners at least annually to discuss ERM developments, consider ways to influence and expand the practice of ERM, and to identify practices that can benefit the ERM community at large.

There is no fee to become an ERM Community Partner; however, interested entities will be required to execute a Letter of Agreement (LOA) with AFERM to authorize the designation and publicity as a Community Partner (refer to sample LOA on pg. 8). The LOA will be renewable annually, subject to termination for convenience by either entity upon written notification.

The AFERM Sponsorship Guidelines and Conditions outlined in Part I apply to ERM Community Partners. ERM Community Partners also receive the following benefits:

- Organization logo displayed at Annual Federal ERM Summit. The method for displaying the logo will be determined by the AFERM Summit Chair.
- Organization name in quarterly AFERM newsletters as an ERM Community Partner.
- Organization logo and link on the AFERM website's Sponsorships page.
- Opportunity to provide informational materials (e.g., flyer, brochure, pamphlet) and/or promotional material at the Annual Federal ERM Summit. The method for distributing the materials will be determined by AFERM.

If space is available, and at the discretion of the AFERM Summit Chair, ERM Community Partners may be offered exhibit space (booth or table) at the Annual Federal ERM Summit at a reduced rate.

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**SAMPLE LETTER OF AGREEMENT for
EDUCATION AND PROFESSIONAL DEVELOPMENT ASSOCIATES**

**Between the Association for Federal Enterprise Risk Management
and the
<Insert Name of Organization Here>**

Whereas the Association for Federal Enterprise Risk Management (AFERM) and the <Insert Name of Organization Here> have a shared interest in promoting the practice of Enterprise Risk Management, and

Whereas both organizations may benefit from a cooperative relationship that aims to increase the ERM-related knowledge, expertise, and capabilities of its respective constituencies,

It is concluded that it would be mutually beneficial to establish a working partnership between the two organizations and to explore opportunities to support ERM-related education and professional development. To further this cooperative effort, AFERM and <Org> hereby subscribe to this agreement and pledge to pursue the following ventures (to be tailored for each organization – following are potential types of activities that could be pursued):

1. <Org> will offer AFERM members a discount on the fee for <X ERM courses, seminars, or certifications>.
2. <Org> will offer space for up to <50> attendees for up to <2> AFERM meetings or workshops annually.
3. <Org> will offer support for at least <1> AFERM webinar during the year.
4. <Org> will author at least <1> ERM-related thought leadership article for an edition of the AFERM quarterly newsletter during the year.
5. AFERM will offer <Name> the benefits as outlined on Attachment A, *Sponsorship Program for Education and Professional Development Associates*.

Whereas AFERM and <Org> agree to make a good-faith effort to accomplish all ventures set forth above, it is acknowledged that the execution of each venture may require further coordination between both organizations to accomplish.

This agreement shall be effective once signed by both organizations and is renewable on an annual basis. Either organization may terminate this agreement by providing written notification.

Accepted for AFERM by:

AFERM Rep

DATE

Accepted for <Org> by:

DATE

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**SAMPLE LETTER OF AGREEMENT For
ERM COMMUNITY PARTNERS**

**Between the Association for Federal Enterprise Risk Management
and the
<Insert Name of Organization Here>**

Whereas the Association for Federal Enterprise Risk Management (AFERM) and the <Insert Name of Organization Here> have a shared interest in improving the effectiveness and efficiency of government and promoting the adoption and practice of Enterprise Risk Management (ERM) in the public sector, and

Whereas both organizations may benefit from a cooperative relationship that aims to increase the related knowledge, expertise, and capabilities of its respective constituencies,

It is concluded that it would be mutually beneficial to establish a cooperative working relationship between the two organizations. To further this cooperative effort, AFERM and <Org> hereby subscribe to this agreement and pledge to pursue ventures such as:

1. Exploring opportunities to promote awareness in each other's activities and services;
2. Jointly sponsoring or supporting ERM-related meetings, seminars or workshops;
3. Supporting and/or jointly undertaking ERM-related research projects or produce thought leadership articles;
4. Offering discounts on memberships, registration fees, etc. for members of each other's organization.
5. Identifying other practices or opportunities to influence and expand the practice of ERM in government.

AFERM and <Org> acknowledge that the execution of specific ventures may require further coordination and agreement between both organizations to accomplish, which may be subject to separate Letters of Agreement or Memoranda of Understanding.

AFERM and <name> authorize each other to publicize the ERM Community Partner designation in promotional and marketing materials as described in Attachment A, *Sponsorship Program for ERM Community Partners*.

This agreement shall be effective once signed by both organizations and is renewable on an annual basis. Either organization may terminate this agreement by providing written notification.

Accepted for AFERM by:

AFERM Rep

DATE

Accepted for <Org> by:

DATE