



Canadian Patient Safety Institute Sponsorship Guidelines

Sponsorship Guidelines

The Canadian Patient Safety Institute is an independent not-for-profit corporation, operating collaboratively with health professionals and organizations, regulatory bodies and governments to build and advance a safer healthcare system for Canadians.

Our Commitment

The Canadian Patient Safety Institute acts as a dedicated resource, a national leader, and a diligent partner to promote a Canadian healthcare system where:

- Patients, providers, government and others work together to build and advance a safer health system;
- Providers take pride in their ability to deliver the safest and highest quality of care possible;
- Every Canadian can be confident that the care they receive is the safest in the world.

Our Goal

The Canadian Patient Safety Institute will have the foresight to adapt and expand into new areas of need by fostering education, production, and evaluation of patient safety initiatives.

Sponsorship Opportunities

Acceptance of Sponsorship

The Canadian Patient Safety Institute solicits sponsorship dollars for various sources to support its work. Guidelines for the Acceptance of Sponsorship by the Canadian Patient Safety Institute are outlined on pages 2 and 3.

Funding to support Conferences/Events

The Canadian Patient Safety Institute will provide funding to support Conferences/Events. Sponsorship will be awarded based on an organization's ability to meet the Canadian Patient Safety Institute criteria, available budget, existing commitments, and 'in-kind' availability. As a condition of funding, a post-event evaluation report is required within 60 days of the conclusion of the event.

The Canadian Patient Safety Institute receives more applications for sponsorship than it has funds to support, therefore, not all worthy causes and organizations can be supported. Guidelines for Sponsorship of Conferences/Events are outlined on pages 4 to 7.

Guidelines and relevant documents are available on the CPSI web site for download.

Thank you for considering the Canadian Patient Safety Institute as a potential partner.

Guidelines for the Acceptance of Sponsorship by the Canadian Patient Safety Institute ¹

Our Vision for Sponsorship

To help achieve our goals, the Canadian Patient Safety Institute accepts support in the form of sponsorships in support of our mission. This support aids our work in several ways, including:

- Resource support for initiatives to further advance the agenda of healthcare safety;
- Support for patient lead patient safety programs at a national and regional level;
- Funding for unrestricted patient safety research and operating grant competitions, studentships and fellowships, and in-house research initiatives;
- Support for speakers and materials at national conferences;
- Funding for educational courses and opportunities produced and/or attended by the Canadian Patient Safety Institute.

Sponsorship Principles

The Canadian Patient Safety Institute is a nationally independent not-for-profit organization that must remain a credible and influential leader in Canadian healthcare because by maintaining its independence from funding partners. This independence includes both the perceived and actual relationships that exist, or that have the potential to exist. The perception of bias in these relationships, especially from for-profit industries, could damage the neutral reputation of the

Examples of Sponsorship Opportunities:

- *Safer Healthcare Now!*
- *Canada's Forum on Quality and Patient Safety need new terms here as this is decided*
- *Canadian Patient Safety Week*
- Healthcare Quarterly Patient Safety Papers Journal
- Patient Safety Officer Course
- Root Cause Analysis workshops
- Patients for Patient Safety Canada operations and workshops

Canadian Patient Safety Institute, and endanger the trust and confidence of the healthcare community and the public.

The following guidelines have been developed to ensure that the Canadian Patient Safety Institute and its existing, and potential sponsors can create and maintain a relationship that is mutually beneficial.

- The Canadian Patient Safety Institute will avoid real or perceived conflicts that may impair the ability of the Canadian Patient Safety Institute, or program participants, to make independent choices regarding initiatives and program content.
- The Canadian Patient Safety Institute will accept sponsorship support for only **unrestricted** use, or for specific projects consistent with our mission and vision.

¹ We would like to acknowledge the Institute for Health Improvement for the use of their *IHI Principles for Accepting Commercial Support* in the creation of this document. We would also like to recognize the reference of other sponsorship guidelines from the Canadian Medical Association, Canadian Health Service Research Foundation, Rx&D, and the Canadian Institutes of Health Research.

- The Canadian Patient Safety Institute will not accept sponsorship for programs related to specific products and their use.
- When there is a direct for-profit organization sponsorship for staff to travel to or from conferences and other educational events, they are not to be so-called “junkets”, or for social purposes. The CEO will review the request to ensure it is to make an appropriate presentation and is not outside the country. If the travel applies to the CEO, then the Board chair will review it. Any travel outside the country for this purpose will be reviewed by two members of the Executive Committee.
- The Canadian Patient Safety Institute will retain control over all selection of personnel, design of the Canadian Patient Safety Institute initiatives and their content, selection of speakers for events, educational materials, and all knowledge transfer programs.
- The Canadian Patient Safety Institute will provide public access to all content that is used and generated. The Canadian Patient Safety Institute also reserves the right to all intellectual properties resulting from initiatives and programs, unless otherwise agreed upon in advance.
- The Canadian Patient Safety Institute will disclose all sponsored activities that are partially or completely funded by industry funds.
- Acknowledgement of The Canadian Patient Safety Institute sponsors will be made in initiative materials or publications and project funders’ reports, as appropriate.
- The Canadian Patient Safety Institute will permit the acknowledgement of sponsorship in industry communications; however, the use of CPSI logo must be approved by the Canadian Patient Safety Institute Director of Communications.

Acknowledgement of Support

The Canadian Patient Safety Institute will recognize sponsorship through appropriate wording or use of logos in the areas outlined below. Additional requests or involvement may be available depending on sponsored initiative or program:

- Program materials
- Website (www.patientsafetyinstitute.ca, www.saferhealthcarenow.ca, www.asklistentalk.ca, www.safesurgerysaveslives.ca, or www.handhygiene.ca)
- Event or initiative presentations and promotions
- Newsletters
- Press releases

Canadian Patient Safety Institute Criteria and Guidelines for supporting Sponsorship of Conferences and Events

Our Vision for Sponsorship

To help achieve our goals, the Canadian Patient Safety Institute may provide funding for Conferences/Events in support of our mission. The following guiding principles are used to prioritize CPSI sponsorships:

- Funding must correlate to the Canadian Patient Safety Institute corporate objectives.
- National health organizations who are Voting Members of the Canadian Patient Safety Institute will receive additional consideration.
- National events should have an average delegate registration in excess of 300. Maximum funding available is \$5,000 per event. Provincial events that meet the full criteria may be supported with reduced cash support or gifts-in-kind, e.g. a CPSI display booth, staff-organized workshops or presentations.
- The event sponsorship and recognition package should provide tangible value back to the Canadian Patient Safety Institute and include options for complementary display booth, logo on program, registration(s), named CPSI Speaker, etc.
- An evaluation report is an essential component of CPSI's support. Organizers are required to provide a conference/event Evaluation within 60 days of the completion of the event, which include recognition of CPSI's support.

Sponsorship principles

The following guidelines have been developed to ensure that the Canadian Patient Safety Institute and its existing and potential sponsors can create and maintain a relationship that is mutually beneficial:

- The health organization applying for support is a Voting Member of the Canadian Patient Safety Institute
- The organization cannot receive any other grant, sponsorship, or support in the form of discounted services from the Canadian Patient Safety Institute.
- The Canadian Patient Safety Institute receives mutually agreed upon benefits as a sponsor of the event.
- The conference/event impacts a broad spectrum of patient safety issues and concerns.
- The conference/event must take place within Canada. Exceptions may be made and will be reviewed on a case-by-case, basis.
- The organization applying for sponsorship must complete a formal application for sponsorship from the Canadian Patient Safety Institute.
- The organization receiving sponsorship funding must complete an Evaluation of Participation and provide it to the Canadian Patient Safety Institute within 60 days of the close of the Conference/Event. The Canadian Patient Safety Institute will review the report to evaluate return on investment and future sponsorship.
- All funds received from the Canadian Patient Safety Institute must be applied to the event as

described.

- Event organizers agree to offer the Canadian Patient Safety Institute first right of refusal for event sponsorship the following year or the next time the event occurs.
- A successful application does not guarantee subsequent year sponsorship.
- Use of the Canadian Patient Safety Institute logo use must be in accordance with the Canadian Patient Safety Institute's visual identity guidelines.
- In assessing its contribution, the Canadian Patient Safety Institute will also take into account the level of contributions from other public and private sector partners.
- The Canadian Patient Safety Institute does not provide financial support for bid preparation.
- The event being solicited for financial support from the Canadian Patient Safety Institute cannot discriminate on the grounds of race, religious creed, colour, national origin, ancestry, age, physical disability, mental disability, medical condition, including the medical condition of Acquired Immune Deficiency Syndrome (AIDS) or any condition related thereto, marital status, sex, or sexual orientation. Further, the organization must agree to conform to the requirements of Persons with Disabilities.
- Finally, the Canadian Patient Safety Institute will not assume any deficit guarantees, environmental liability, or underwrite other contingent liability, such as revenue guarantees for any event.

Ineligible Activities

The Canadian Patient Safety Institute will not consider the following requests for support of:

- Events taking place before the application date for sponsorship support
- Operational costs for not-for-profit organizations
- Travel expenses, trips or tours
- Advertising for fundraising purposes
- Personal, family or friends' events
- Fundraisers, door prizes or raffles
- Capital projects or campaigns

Negotiation of benefits

The Canadian Patient Safety Institute is looking for unique ways to enhance the Conference/Event experience. Typically, we look for value in assessing the sponsorship experience. To obtain value in sponsorship dollars for the Canadian Patient Safety Institute's sponsorship opportunities, a value is attached to the benefit provided. While some elements of recognition are considered tangible, an actual value may be applied. Dollar values must also be allocated to intangible benefits and opportunities provided by the event organizer.

Traditional Recognition (Tangible)	Traditional Benefits and Opportunities (Intangible Property Attributes)
<ul style="list-style-type: none"> √ Event signage √ Logo recognition on screens √ Posters √ Flyers √ Advertisements √ Programs √ Website √ Social Marketing √ Media releases √ Photo opportunities √ Media launches √ Trade shows √ Newsletters √ Bookmarks √ Promotional items <ul style="list-style-type: none"> ▶ Lanyards ▶ Delegate bags ▶ Gifts ▶ Etc. √ Tickets / Invitations √ Outdoor √ Publicity values 	<ul style="list-style-type: none"> √ Prestige √ Sponsorship level exclusivity √ Relationship building √ Track record √ Hospitality (guesting/hosting) √ Networking opportunities √ VIP access √ Leveraging of sponsorship √ Media coverage √ Access to lists/databases √ Access to target audiences √ Access to list of other sponsors √ Speaking opportunities for CPSI lecturer

Sponsorship Criteria Checklist

Sponsorship opportunities can help the Canadian Patient Safety Institute reach key audiences and enhance our profile. The following considerations help to determine if an event or conference is a good sponsorship fit for the Canadian Patient Safety Institute:

Exclusivity - *Does the sponsorship opportunity provide exclusivity to promote the Canadian Patient Safety Institute?*

Compatibility - *Does the event align with the objectives of the Canadian Patient Safety Institute?*

Market - *Will the event attract national or international delegates?*

Eligibility - *Opportunity does not feature a political party, religious organization, or an individual.*

Lead-time - *Event has not already been held, or will be held prior to CPSI considering the sponsorship application.*

Promotion - *The sponsorship should have no promotional restrictions that would inhibit the Canadian Patient Safety Institute's ability to leverage it.*

Reach - *Does the applicant have a key target audience that can be defined and is this audience important to the Canadian Patient Safety Institute?*

Builds relationships - *Does the sponsorship opportunity present a desirable means to enhance the Canadian Patient Safety Institute? Does the opportunity have program support?*

Generates media coverage - *Applicant has the ability to generate measurable media coverage.*

Sponsorship Application

Completed application forms can be faxed to the Canadian Patient Safety Institute at (780) 409-8098 or emailed to: New email address that goes to Jody, e.g sponsorship@cpsi.ca
Confirmation of receipt will be emailed within one week of receiving applications.

The Application process occurs X times annually. Applications will only be received in conjunction with these.

- Deadlines - Applications must be received at least three months prior to the event. Applications submitted with insufficient lead time to review, negotiate and execute the sponsorship regrettably will be declined.
- Applications will be assessed on their own merit and will compete with other similar applications. Sponsorship will be awarded based on an organization's ability to meet the Canadian Patient Institute's selection criteria, available budget, existing commitments, and 'in-kind' availability. NOTE: The Canadian Patient Safety Institute receives more applications for sponsorship than it has funds to support.
- As a condition of funding, a post-evaluation report is required by the Canadian Patient Safety Institute, within 60 days of the conclusion of your event.

Additional information may be forwarded to support your request however you are still required to complete this application form.

Questions - For questions regarding an application, please feel free to contact Joseph Gebran at jgebran@cpsi-icsp.ca.

Thank you for considering the Canadian Patient Safety Institute as a potential partner.

We wish you success with your event.



Sponsorship Application

Application Date:	
Name of Organization Applying:	
Mailing Address:	
Is your organization a Canadian Patient Safety Institute Voting member?	Yes _____ No _____
Applicant Name:	
Applicant Phone Number:	
Applicant Fax Number:	
Applicant email address:	
Applicant role relative to the event / conference?	
Event Date[s]: month / date[s] / year	
Total Number of Event / Conference Days:	
Event / Conference Name:	
Event / Conference Website:	
Type of Event [conference, meeting,, etc]:	
Briefly describe the purpose of the event / conference:	

How will your event/ conference benefit patient safety?	
Describe the demographics of your event audience / conference delegates	
Is this a first time event? If no, please provide history: - When was it held? - Where was it held? - How many participants? - Has the Canadian Patient Safety Institute previously sponsored the event?	Yes _____ No _____ If no, please provide details.
Is the event: - One time, only? - Annual? - Not annual, but recurring?	
Where is the event / conference taking place? [name of venue & address]	
Is there a charge to participate? If yes, what is the charge?	
Estimated number of participants:	# from Canada _____ # from USA _____ # International _____
Will there be a tradeshow as part of the event / conference?	Yes _____ No _____ If yes, please provide details.
Please list confirmed sponsors and the value of their contribution:	

Sponsorship requested from the Canadian Patient Safety Institute:	<ul style="list-style-type: none"> - Amount: <ul style="list-style-type: none"> o \$_____ - In-Kind: - Please outline other sponsorship opportunities related to this event.
If approved, what will the sponsorship be used for (please explain).	
List benefits the Canadian Patient Safety Institute will receive as a sponsor (i.e. CPSI Speaker, media exposure, promotional benefits, speaking opportunities, complimentary registrations, tickets and invitations, etc.).	
Other points you feel we should be aware of:	

Please include:

- the Conference/Event budget
- a complete sponsorship package outlining all levels of opportunities and corresponding benefits

I have read and understood the Canadian Patient Safety Institute Sponsorship Criteria and Guidelines and, if approved for sponsorship, I agree to comply with the noted guidelines.

Signed

Date

Office Use Only:

Date Application Received:

Budget Received:

Sponsorship Package Received:

Sponsorship Application Evaluation

Name of Organization Applicant _____

Name of Event/ Conference _____

Support Requested [\$ and in-kind] _____

Funding or in-kind services will be considered for conferences and special events that achieve one or more of the following goals and objectives, in addition to achieving a funding criteria score of at least 40 out of a possible 60.

Guiding principles for Canadian Patient Safety Institute sponsorship

- ✓ Focus on patient safety in program content.
- ✓ Supports Canadian Patient Safety Institute Voting Members with a strong commitment to patient safety as a priority.
- ✓ Must be a national event with average delegate registration in excess of 500; provincial health organizations with a strong commitment to patient safety may also be considered.
- ✓ Meeting has a minimum of 10 per cent content dedicated to patient safety and/or are directly aligned with the work of CPSI. etc.
- ✓ Sponsorship and recognition package should include options for booth, logo, complimentary registrations(s), named CPSI speaker
- ✓ Evaluation and reporting components are essential elements in consideration of final and future funding.

Special circumstances

- ✓ If few of the above criteria can be met (e.g. not a Voting Member or a national event), considerable weight and measurable returns should be attributed to relationship building with the organization making the request.
- ✓ The request is a one-off situation
- ✓ Board, CEO or senior management consensus

Status:

TOTAL POINTS:
SUPPORT (funding amount): \$
DECLINE:

Points	Sponsorship Dollars
56 to 60 points	Up to \$10,000
50 to 55 points	Up to \$5,000
45 to 49 points	Up to \$2,500
40 to 45 points	Up to \$1,000
Under 40 points	No support

Comments:

Funding criteria evaluation

1. The sponsorship application is satisfactorily completed and the event does not fall within three months of the application date.	5 points	
2. The event/conference will promote the Canadian Patient Safety Institute as doing positive work for patient safety.	5 points	
3. There is opportunity for the Canadian Patient Safety Institute to leverage promotional and marketing opportunities.	5 points	
4. The event/conference has the potential to provide media exposure for the Canadian Patient Safety Institute.	5 points	
5. There will be an opportunity for Canadian Patient Safety Institute employees to participate in the event/conference.	5 points	
6. There is evidence that the Canadian Patient Safety Institute is already aligned with the premise of the event/conference.	5 points	
7. The applicant has demonstrated financial need and has the support of other sponsors for this event.	5 points	
8. The event /conference is national or international, and sanctioned by a parent association.	2 points	
9. Attendance includes a wide reach of the patient safety community: <ul style="list-style-type: none"> ○ 1000 or more delegates – 3 points ○ 500 to 999 delegates – 2 points ○ Under 500 delegates – 1 point 	1-3 points	
10. Optics: Will we be noticeable by our absence?	5 points	
11. The event/conference supports a current 'hot topic in patient safety or an initiative' of the Canadian Patient Safety Institute.	5 points	
12. The event/conference elements are supported by the Directors of Operations and the CEO of the Canadian Patient Safety Institute.	5 points	
13. The event will reach an audience important to or within the healthcare community.	5 points	
Subtotal - # /of possible 60 points	# / 60	
Consider the following: <ul style="list-style-type: none"> • Do we already sponsor something benefiting that particular group? • Does it pose a major conflict with anything we currently sponsor? • Is there any questionable aspect to the event / conference? • Are there any foreseeable negative connotations that would impact the Canadian Patient Safety Institute? 	Deduct 0 to 10 points	
Total - #/of possible 60 points	# / 60 points	

Evaluation of participation

The Organizer is required to submit their report within 60 days, following their event

Event/Conference Sponsorship Final Report

Please complete this survey form following your conference and event and fax or mail it to:

Name of Organization Applicant _____

Name of Event/ Conference _____

Date(s) of Event/ Conference _____

1. Final attendance _____. Is this greater or less than projected? _____

2. Please attach printed samples of programs, posters, etc. yes____ no____
(If no, then please explain why not)

3. Media exposure of event/conference:
 Number of printed articles (enclose samples) _____
 Number of electronic stories (specify stations) _____

4. Please provide 4 – 6 photographs from event that best capture the highlights, e.g. CPSI Speaker.

5. Provide a sampling of comments from delegates or event audience, if available (Note: I find this a bit excessive and not all that useful)

6. Did Canadian Patient Safety Institute representatives attend your events? If yes, please indicate date(s) & name(s).

7. Overall, would you say the event met or exceeded your expectations? Please elaborate.

8. Were you successful in delivering all our sponsor benefits? Please explain.

9. Were you satisfied with the level of support [financial, in-kind, guidance] for your event/conference from the Canadian Patient Safety Institute?

Unsatisfied Somewhat Satisfied Satisfied Very Satisfied

Please explain:

10. Please provide any additional information you feel would be of value.

Sponsorship Agreement

This sponsorship agreement made the _____ day of _____, 20__:

BETWEEN:

The Canadian Patient Safety Institute (hereinafter referred to as the “*Sponsor*”);

and

_____ (hereinafter referred to as the “*Organizer*”)

TERMS OF AGREEMENT:

Sponsorship Fee and Conditions

1. The Organizer agrees to grant the Sponsor the benefits of sponsorship outlined in **Schedule A** attached. (Organizer deliverables)
2. It is agreed that at the time of renegotiation, the Organizer will automatically invite the sponsor to renegotiate the agreement. (I don't know what this means?)
3. The sponsorship will be for the period of _____ to _____.
4. The sponsor agrees to provide the Organizer with items outlined in **Schedule B** attached. (Sponsor Deliverables)
5. The Organizer agrees to provide the sponsor consideration for the value of sponsorship in the form of in-kind products and services as well as recognition for the financial support.
6. The Sponsor shall provide the Organizer in-kind sponsorship valued at \$_____. Details outlined in **Schedule B** attached.
7. The Sponsor shall provide the Organizer \$_____ cash sponsorship (inclusive of GST, if applicable) in Canadian funds.
8. The Sponsor shall adhere to the schedule of payment outlined in **Schedule B** attached.

General Provisions

9. **Abandonment of Event:** In the event that the Event is abandoned by the Organizer at any time after the execution of this Agreement, this Agreement shall terminate. The Organizer agrees to return the Sponsor's contribution. In no event shall the Organizer be liable to the Sponsor for loss of publicity if the Event is not produced for any reason.
10. **Right to Audit:** The Sponsor may audit all financial and related records associated with the Organizer's Event, and the Organizer agrees to keep and maintain records for a period of six (6) years after the end of the agreement. The records shall be maintained in accordance with generally accepted accounting principles, and the Organizer shall at its own expense make such records available for inspection and audit (including copies and extracts of records as required) by the Sponsor at all reasonable times and without prior notice. Subject to the foregoing, costs of any audits conducted under the authority of this section will be borne by the Sponsor. This section shall not be construed to limit, revoke, or abridge any other rights, powers, or obligations relating to audits which the Sponsor may have by Federal, Provincial or Municipal law, whether those rights, powers or obligations are express or implied.
11. **Entire Agreement:** This Agreement constitutes the entire agreement between the parties. There are no representations, warranties, forms, conditions, undertakings or collateral agreements, express implied or statutory between the parties other than as expressly set forth in this Agreement.
12. **Provision of Completed Event Summary:** The organizers agree to complete and submit an Event Summary Form or Event Report to the satisfaction of the Sponsor's Communications Manager within 60 days, following the conclusion of the event.
13. **Amendments and Waivers:** No amendment to this Agreement shall be valid or binding unless set forth in writing and duly executed by both parties.
14. **Insurance:** The Organizer shall, at its own expense, carry and maintain in full force and effect for the full term of this Agreement Comprehensive General Liability Insurance protecting the Sponsor, the Organizer and their respective employees, agents and contractors against damages arising from bodily injury (including death), personal injury and claims for property damage which may arise directly or indirectly out of the operations of the Organizer, its employees, agents or contractors under this Agreement. The foregoing insurance shall not be less than \$2,000,000 inclusive of any one occurrence. Proof of insurance must be submitted to the Sponsor's Communications Manager.
15. **Liabilities:** Each party shall indemnify and save the other party harmless from and against all losses, damages, claims, suits, costs, or liabilities which the other party may suffer or incur as a result of the breach by it of any provision of this Agreement or as a result, directly or indirectly, of its wrongful acts, omissions or negligence or those of its employees, agents or contractors.
16. **Disclosure:** The terms and conditions of this agreement shall not be disclosed to any third parties without the prior written consent of both parties.

17. **Transferability:** The rights of either party under this agreement shall not be transferable or assignable either in whole or in part.

Governing Laws

16. This agreement shall be governed by the laws of the Province of Alberta.

Notices

17. Any demand, notice, or communication to be made in connection with this Agreement shall be addressed to the recipient as follows:

To the Organizer:

To the Sponsor:

Cecilia Bloxom, Director of Communications
Canadian Patient Safety Institute
10235 – 101 Street NW, Suite 1414
Edmonton, Alberta T5J 3G1

IN WITNESS WHERE OF the parties understand and agree to the terms of this Agreement.

Per _____

Print name _____

Authorized Signing Officer

(Affix corporate seal or attach affidavit verifying signing authority)

THE CANADIAN PATIENT SAFETY INSTITUTE

Per: _____

Cecilia Bloxom, Director of Communications

Approved as to Form

Corporate Services, Canadian Patient Safety Institute

SCHEDULE A

ORGANIZER DELIVERABLES [benefits of sponsorship]

1. Exclusivity

The Sponsor shall receive the exclusive sponsorship rights as a co-sponsor for the Conference/Event.

2. Use of Event logo

The Sponsor shall, in accordance with the terms and conditions set out in this Agreement, be entitled to use the Conference/Event Logo in print materials for the sole purposes of marketing and advertising the Sponsor's association with the Event.

3. Tickets / Invitations

3.1. The Sponsor shall be entitled to receive xx tickets to attend xxxxx to be used at their discretion.

4. Promotions

The Sponsor shall be entitled to conduct promotions including advertising and displays at the Event. All such promotions are subject to the prior written approval of the Organizer. The Sponsor will be entitled to:

- 4.1 ? x ? Tradeshow booth in Exhibit area.
- 4.2 Exhibitor passes for up to xxx Canadian Patient Safety Institute staff.
- 4.3 Banners – The Organizer agrees to hang a 4'x8' Sponsor banner at the event venue (banner is to be supplied by and returned to the Sponsor).
- 4.4 Recognition as a sponsor in press announcements, media events and public service announcements, printed materials, paid and non-paid printed advertisements, outdoor advertising and electronic media.
- 4.5 The Organizer will provide the Sponsor with the opportunity to insert a sponsor item in each of the delegate packages or event gift bags, if requested by the Sponsor.

5. Hospitality

5.1 The Sponsor shall be entitled to XXX complimentary passes for Canadian Patient Safety Institute members and guests to attend any social functions related to the Event

6. Website

- 6.1 The Sponsor shall be entitled to receive recognition as a (sponsorship category) partner of the Event on the official Event website.
- 6.2 The Sponsor shall be entitled to receive a link from the official Event website to the Sponsor's website.
- 6.3 All costs associated with creating the benefits to be provided in clauses 6.1 and 6.2 of this **Schedule A** are to be borne by the Organizer.

7. Program

- 7.1 A full-page colour advertisement to appear within the first 10 pages of the program. Camera-ready artwork will be provided by the Sponsor.
- 7.2 Recognition as an official sponsor of the Event on the sponsor's page of the official program.
- 7.3 Message from the CEO of the Canadian Patient safety Institute welcoming participants/delegates on the first three pages of the program (message to be provided by the Sponsor).

8. Speaking Opportunities

- 8.1 The Sponsor shall be provided an opportunity to participate in the Opening/Closing ceremonies for the event to provide a welcome address from the Canadian Patient Safety Institute.
- 8.2 The Sponsor shall be provided an opportunity for the Canadian Patient Safety Institute or their representatives to participate in plenary sessions for the event.

SCHEDULE B

SPONSOR DELIVERABLES [details of sponsor contribution]

In consideration of the Canadian Patient Safety Institute being recognized as a (Category) sponsor for the (Name of the Event), the Canadian Patient Safety Institute agrees to provide to:

Event Name:

Event Start/End Dates:

Sponsorship Details:

Cash

- Sponsorship dollar amount \$ xxxx
- Terms (Invoice billing schedule):
 - 50% - to be provided on signing the Agreement
 - 40% - to be provided 30 days prior to the Event
 - 10% - to be provided on completion of the post-Event/Conference evaluation

In-kind Services

- List any in-kind services being provided by the Sponsor to the Organizer for this event

Total Value of Sponsorship

- Total sponsorship is valued at \$ xxxx which positions the Canadian Patient Safety Institute as a CATEGORY sponsor

Promotional Items

- List any promotional materials being provided to the Organizer to promote the Sponsor at this event (i.e. lanyards, brochures, hand sanitizer, pens, items in delegate packages, etc.)

Advertising

- List quantity and size of camera ready artwork to be provided

Miscellaneous

- List anything that does not fall in the above categories.

Sponsorship Application Tracking Procedures

Name of Organization:

Event Name:

✓ Action/Responsibility

Date

1. Application - Received by Canadian Patient Safety Institute:	
Application date stamped and logged in Database (or spreadsheet)	
<ul style="list-style-type: none"> • Group Information (legal name, address, contact, etc.) • Event Information (name, date, location, # of delegates, etc) • Request Information (amount requested, level of recognition, purpose of funding) 	
Acknowledgement email generated for Coordinator to send.	
2. Coordinator - Application Review	
Initial review for eligibility (If ineligible, notify by phone, clerical follow up with letter)	
Event Objectives reviewed	
Budget Information provided	
Complete 'Application Evaluation'	
Proof of \$2 million liability provided	
3. Coordinator – Generate Recommendation	
Gather input from relevant Project Manager	
Make recommendation (Maximum \$5,000/event)	
Approval of Director	
Advise group of recommendation - notify by phone	
Written notification – follow-up letter generated from Clerical	
Provide logo and logo use guidelines	
4. Coordinator - Generate Agreement	
Draft agreement	
Input from group on level of recognition	
Confirm payment schedule	
Negotiate Schedule A and B of agreement	
Notify clerical to prepare agreements	
5. Clerical – Process Agreements	
Prepare 4 agreements for signing (4 copies)	
Clerical to prepare cover letter for agreements	
Send all copies and instruction cover letter to group for sign and seal	
Agreements returned from group – Coordinator notified	
To Director for signature (CEO if above \$5,000)	
<ul style="list-style-type: none"> • 1 Fully executed copy sent Corporate Services • 1 fully executed copy to file • 1 copy retained to be returned to group with Canadian Patient Safety Institute signature 	

	Arrange for link to conference on Canadian Patient Safety Institute website	
	Banner/display couriered one week in advance	
	Send blank copy of 'Final Report' to Organizer so they can begin gathering necessary materials	

6.	Clerical – Payment	
	Cheque Requisition and 1 copy of agreement Corporate Services	
	Cheques received from Corporate Services	
	Cheque Letter prepared for Coordinators signature	
	Photocopy cheque letter and cheque	
	Cheque, letter and 1 copy of agreement mailed to group	
7.	Clerical – Follow up	
	Update Database (spreadsheet)	
	Add stats from this event into overall 'sponsorship' stats	
	Flag event for follow up report [must be received 60 days, post event]	
	Reminder Letter 1 month post event	
	Report to Coordinator for review	
	Report filed [by name of application organization]	