

**Policy:** **Event Guidelines**Effective Date: March 17, 2021Confirmation: **Purpose**

CFALA Society Los Angeles (“CFALA”) is willing to orchestrate and promote certain events for the benefit of its members. Other types of events may introduce conflicts or are not aligned with our mission. This policy clarifies which types of events are and are not acceptable.

**Acceptable Events****1. Hosted Events**

A hosted event is one where CFALA creates the idea, finds the speaker(s), makes a financial commitment and identifies the physical or digital venue. Hosted events should represent the majority of events undertaken. Examples include the Annual Meeting and the Forecasting Dinner.

**2. Co-Hosted Events**

These are identical to hosted events except that CFALA will work closely with another professional organization, a sister Society or a third party provider of educational content. The financial commitment may be shared. If the partnering organization is the host and requires personal information from our members, this information may not be used for purposes unrelated to the event in question. Co-hosted events must be approved by and facilitated through the Chief Executive Officer.

**3. Promoted Events**

Other Societies may make their events available to our members. CFALA is willing to promote these events by providing links on our website, specifically the page titled “Global Society Content”. Limiting promotions to this area helps to assure that members understand these events are not sponsored by CFALA. On occasion, the CEO may promote a special event such as a distinguished speaker on CFALA’s main calendar. CFALA assumes no responsibility for these events and provides no financial support.

**Unacceptable Event Types****1. Corporate Events**

A corporate event is one where a corporation wishes to make a presentation that focuses on a product or service that they provide. An example would be an analysis firm that wants to promote their asset optimization software.

**2. For-Profit Organization Events**

A for-profit organization event is one which is sponsored by a for-profit organization. This includes events that may be educational in nature.

**3. Marketed Events**

A marketed event is one where an affiliated organization or firm hosts an event and asks CFALA to “co-host” but does not include CFALA in the formation of the event, the selection of the speakers or in financial commitments.

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