

**Policy #36-15**

**Date: March 23, 2015**

**Policy and Procedure: Unsolicited Marketing at CMSNE Events**

**Policy**

To prevent unsolicited/unsponsored marketing at CMSNE program and conference events; provide an environment that fosters business relationships, networking and educational seminars that promote professional growth for case managers.

**Purpose**

To ensure CMSNE events remain free from unsolicited marketing by program/conference attendees, in alignment with CMSNE's core values and mission as an organization.

**Procedure**

1. Marketing activities at a CMSNE meeting or event are never allowed by an individual who has not submitted or adhered to the CMSNE marketing guidelines.
2. Marketing activities are defined as:
  - Distribution of informational flyers, corporate brochures, and promotional marketing materials
  - Dissemination of business cards strictly for informing other attendees of an organization's offerings, i.e., products, programs, or services
  - Opportunities for conversational networking that are utilized to approach attendees with service, product, or service information about a health care company or organization
3. Marketing activities at conferences or educational events organized, facilitated, and promoted by CMSNE is strictly limited to individuals or organizations who:
  - Sponsor a meal, refreshments, and/or snacks in accordance with an educational seminar
  - Support CMSNE with a meeting location or space to hold an event
  - Sponsor the cost and offering for professional continuing education credits
  - Complete an application that is formally approved for a sponsorship or exhibit booth
4. When attendee registration is specifically not included in the above mentioned description, registration is an additional purchase for sponsor/exhibitor attendees involved in marketing activities.

5. Marketing activities at a CMSNE meeting or event are not permitted by an individual or organization whose application was submitted but not accepted or approved due to a space limitation or any other reasons.
6. Notification of the CMSNE guidelines for Marketing will be included in all CMSNE program/conference confirmations.  
Notification will state: ***CMSNE strictly prohibits attendees from marketing unless registered as a program sponsor or vendor. Attendees found to be marketing without a vendor registration will be asked to leave and forfeit their attendee registration fee.***
7. Attendees in conflict with this policy will be requested to immediately cease from engaging in activities that are not in compliance with this policy. The first offense is a warning violation which includes an advisement of chapter policy and a request to discontinue any further marketing activities. A second offense of the same will result in expulsion from the event and forfeiture of any paid registration and/or additional related fees.
8. First and second offense violators will receive an email notification post program/conference describing the issue and sharing the CMSNE Policy and Procedure for their personal reference.
9. Registered attendees who repeatedly engage in forbidden marketing or promotional activities and are expelled from a CMSNE event a second time will not be allowed to register for future chapter events. Any previously accepted event registrations will be cancelled and related fees paid will be refunded. Sponsorship applications will also be declined for future CMSNE events.
10. Requests for marketing from companies associated with any individual who has previously violated CMSNE Policy and Procedure will be reviewed and determined on an individual basis. All organizations filing such an application shall be advised of applicable CMSNE Policies and Procedures and must agree to abide by such prior to acceptance of the application.



Signed:

Date: March 27, 2015

Rose Zawia, Chapter President, CMSNE, 2013-2015