



Chapter Speaker's Policy and Speaker's Bureau

The Keystone Chapter of Community Associations Institute has adopted the following speaker guidelines in order to establish a fair and equitable environment for all members who wish to benefit from speaking at chapter programs, and those who wish to benefit from the educational nature of these programs. Any conflict which may arise within these guidelines will be resolved only by the chapter Board of Directors. Speakers are required to submit the CAI Speaker's Bureau Application and agree to abide by all CAI Speaker Policies.

Scheduling

Scheduling of any chapter program or activity must be approved by the Executive Director, the Committee responsible for the activity, and be within the budgetary parameters set forth in the chapter budget. Expenditures outside of the approved budget are subject to the approval of the chapter Board of Directors. All programs must be scheduled a minimum of 12 weeks prior to the event. The chapter will, to the greatest extent possible, make all event scheduling decisions before January 1st of each year.

Chapter Speakers Bureau

Objectives of the Speaker's Bureau

All presenters selected to speak at a chapter program must be a member of the Chapter Speakers Bureau. The chapter has established this speaker's bureau in order to accomplish the following objectives:

1. Insure that the chapter has a broad list of competent, knowledgeable presenters for chapter programs.
2. Insure that all members who wish to have the opportunity to be considered as a presenter are afforded that opportunity.
3. Insure that chapter committees have a broad selection of potential speakers from all geographic areas from which to choose.
4. Insure that chapter committees are not using the same presenters on a regular basis.
5. Insure that the chapter office has the information it needs to promote the program and speakers in a timely manner.

Membership in the Speakers Bureau

1. Potential speaker must be a current member of the Keystone Chapter for a minimum of 90 days prior to applying for membership in the Speakers Bureau. Speakers from other CAI chapters and CAI's national organization will be considered on a case by case basis. The chapter will make exceptions to this rule in the case of government employees, elected officials and university/college faculty/staff with expertise in a subject area not covered by a member of CAI. The chapter board of directors may approve a non-member speaker if there is a justifiable reason for not using a member.
2. If an approved member of the speaker's bureau allows his or her membership to lapse, the speaker will be dropped from the speaker's bureau. The speaker may re-apply to the speaker's bureau once membership is renewed.



3. In order to be considered for membership in the speaker's bureau, each potential speaker must fill out and submit to the chapter office the Speakers Bureau Application.
4. Each potential speaker will be asked to identify which geographic regions within the chapter's territory in which they are willing to speak.
5. Completed speaker's bureau applications will be reviewed and approved by the chapter board of directors on a monthly basis.

Speaker's Bureau Guidelines

1. Individuals may speak at any chapter program once per calendar year.
2. Multiple individuals from a single member company may speak at chapter programs throughout the year but no member company shall have the opportunity to provide a speaker more than 2 times each calendar year.
3. In the case of programs offered by any CAI Regional Council, a member company may not provide a speaker more than one time per year in any regional council area.
4. The speaker's bureau roster will be maintained by the chapter office. Prior to notifying a speaker that they have been selected to speak, each chapter committee will confirm with the chapter office that the individual is a member of the speaker's bureau and is qualified to be a speaker under these guidelines.
5. The chapter office has the authority to veto any speaker selection that does not comply with the speaker's bureau guidelines.

Speaker Selection

Chapter committees must select speakers who are approved members of the chapter speaker's bureau. A list will be provided to committees at the committee kickoff in January and will be provided with updated speakers' lists as necessary.

CAI may require that more than one company in an industry (such as attorneys or management companies) participate in a program that is selected for presentation to chapter members.

Once a speaker is selected, the speaker will be asked to complete a Call for Presentations outline that will detail the topics to be covered by the speaker. This information must be completed and submitted to the chapter office 90 days in advance of the program date. Speakers may bring an additional representative to assist the speaker at a program, however the additional representative may not participate as a speaker during the program. The additional representative must register as an attendee through the chapter office but will not be required to pay a registration fee. Substitute speakers, regardless of the reason for substitution, must be approved in advance by the executive director.

Speakers are not required to pay a registration fee for the program at which they are presenting.

Presentation Materials

Speakers are responsible for providing a topic outline, bio and signed Call for Presentations not less than 90 days in advance of the program date to insure the chapter has ample time and info to properly publicize the program. A copy of any power point presentations and handouts must



be provided to the chapter office no later than three weeks in advance of the program. Contents of presentations and handout materials should reflect the educational purpose of the program and should not promote the speaker's commercial interests. Handouts may be copied on company letterhead. The chapter will not print handouts for speakers and encourages the use of power point presentations to reduce printing. If the presentation items are not provided to the chapter within established time frame, they will not be permitted to be used on the program date. The chapter reserves the right to request changes to presentations and handouts.

Endorsement

Speakers for the chapter are prohibited from endorsing a service or company to an attendee at a program. In addition, the use of a speaker does not imply an endorsement of the speaker's product or service by CAI.

Self-Promotion

Speakers are prohibited from distributing business cards or other promotional materials to attendees at a program. However, the speaker may network with attendees during breaks and after the program and provide business cards or other promotional materials to attendees who specifically request such information.

The speaker's name, title, company/firm name, CAI designations and other short biographical and contact information (phone number, email address and/or website address) will be included on the event flyer.