



STATE BAR MISSION:
Preserve and improve
our justice system in
order to assure a free
and just society under
law.

ADMINISTRATIVE ADVISORY NO. 06-09

DATE: September 18, 2006
TO: All State Bar Staff
FROM: Robert A. Hawley, Deputy Executive Director
SUBJECT: **ADMINISTRATIVE ADVISORY NO. 06-09
EVENT SPONSORSHIP POLICIES AND PROCEDURES**

The State Bar of California recognizes that sponsorship of State Bar events may enable the State Bar to increase revenues or reduce costs. Therefore, it may be appropriate under proper circumstances for the State Bar to enter into such arrangements. All Event Sponsorships are subject to the following policies and procedures:

DEFINITIONS

An “Event Sponsorship” is defined as any sponsorship arrangement in which a commercial or non-profit entity or individual provides financial or in-kind support to the State Bar for one or more events or any portion of an individual event. Examples of such State Bar events include, but are not limited to, the State Bar Annual Meeting, State Bar Section CLE courses, State Bar Section events, and the State Bar’s employee recognition ceremonies.

Exclusions

Member benefit programs and licensing agreements are not covered by these policies and procedures.

POLICIES AND PROCEDURES

1. Control: The State Bar must retain and exercise full control over the sponsored activity.
2. Identity: In any Event Sponsorship, the identity or presence of the State Bar must predominate and must never be compromised or confused by association with the sponsor.
3. Conflict: The Event Sponsorship must not conflict with the State Bar’s mission, goals, or policies.
4. Acknowledgment: Acknowledgment must not be so extensive as to suggest that the sponsor “owns” or “controls” the sponsored entity or its programs, products, or events. Additionally, descriptions of the relationship between a sponsored entity and its sponsor must not imply endorsement of the sponsor. Words that imply endorsement, such as “exclusive,” “partner,” “preferred,” or “endorsed” must not be used in describing such relationships. Suggested wording for Event Sponsorships is as follows:

The State Bar's Section Institute reception is presented with the generous support of ABC Company and the following additional sponsors.

ABC Company is a proud sponsor of the State Bar's Employee Recognition Ceremony.

5. State Bar Trademarks: The State Bar's name and logo or any other State Bar trademark must not appear on products, materials, advertising or other promotional offerings produced by the sponsor without complying with State Bar policies and procedures governing such use. (Copyright and Trademark Policies and Procedures, Administrative Advisory No. 05-03). The State Bar's name and logo must not be used in such a manner as to express or imply an endorsement by the State Bar of a sponsor's product, publication, or service. Permission to use the State Bar's name or logo in conjunction with a sponsor's product, publication, or service must be in writing.
6. Mailing Lists: Hard copy or e-mail mailing lists of members of the State Bar or hard copy or e-mail mailing lists of Section members may not be provided in exchange for or in connection with an event sponsorship. The above notwithstanding, sponsors may be provided the names and addresses of attendees at sponsored events if attendees' written permission is obtained.
7. Editorial Decision-Making: No Event Sponsorship may permit the sponsor to control the content or express an editorial view in a State Bar or State Bar section publication.
8. Corporate Products: No Event Sponsorship shall require that the State Bar or State Bar section assist or advise a sponsor in product development by testing or reviewing a sponsor's product. Sponsor products may be distributed at sponsored events if the State Bar agrees in advance.
9. Vendor Solicitation: State Bar vendors may participate in Event Sponsorships so long as their participation is voluntary and without the promise, expressed or implied, of future business from the State Bar.
10. Review of Proposals: In reviewing sponsorship proposals, factors that will be considered include:
 - a. Compliance with State Bar policies.
 - b. Effect on membership or membership programs, services, and activities.
 - c. Relevance to the sponsored event or activity.
 - d. Effect on other State Bar or State Bar section events.

- e. Effect on existing or anticipated revenues.
 - f. Impact on the reputation or identity of the State Bar and State Bar sections and their respective programs and services.
 - g. Legal or political implications.
11. Reservation of Rights: The State Bar reserves the right, in its sole discretion, to reject any proposed sponsorship for any reason or no reason at all.
12. Review and Approval: Consistent with these policies and procedures, the State Bar's department heads may consider and approve any Event Sponsorship solicitation that supports programs or activities within their area of responsibility. The Office of General Counsel is available to assist staff with any legal questions or concerns.

(Signed original on file in the Office of the Executive Director)