



Licensing Executives Society
(U.S.A. and Canada), Inc.

LES Chapter Leadership Manual

2011-2012

October 2011

LES Chapter Leadership Manual

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Introduction and Overview

LES (USA & Canada) serves its members in a variety of ways, including local networking and educational opportunities. These functions are carried out by more than 40 Chapters of LES (USA & Canada). Chapters are an extension of the national organization, working under the strategic direction set by the Board of Trustees and are not independent entities. LES Chapters are located in geographical areas with sufficient concentrations of LES members and licensing professionals. LES Chapters, under the direction of local Chapter leaders, hold regular meetings and events where LES members and outside speakers make presentations on topics relevant to technology transfer and licensing. If a formal presentation is not offered, a Chapter event may be planned to informally network and exchange ideas.

Many attendees of local Chapter meetings are LES members who do not regularly attend the seasonal or annual LES meetings. Consequently, Chapters often are the entry and focal points of activity for many LES members and non-members. The quality and quantity of Chapter events may determine if professionals will join or renew their LES Membership. As the Local Chapter leader, you serve an important role in furthering the interests and vitality of LES to an important segment of the membership.

Administrative Support

All LES Chapters are to be managed by volunteer LES members. LES will provide reasonable administrative support to all recognized Chapters from the LES office (Alexandria, VA.) There will be at least one staff position in the LES office dedicated to the advancement of Chapter activities and will provide or coordinate at a minimum the following services:

- A web page dedicated to Chapter news and event information
- Online registration capabilities
- Email notifications
- Event payment processing
- Accounting services related to Chapter events

Further details on how these services are performed can be found in the events procedures section.

Chapter Trustees

Each Chapter is assigned a LES Board Trustee who reports to the Vice President of Local Chapters. LES staff and LES Chapter Trustees are your first point of contact for information, questions and guidance. A list of all local Chapters and their respective Chapter Trustees can be found on the LES website at www.lesusacanada.org/Chapters. Click [here](#) to view a complete list of LES Board of Trustees and their contact information can be found at

Communication to LES Members

All official Chapter communications shall come from the LES office in accordance with related procedures. These communications include, but are not limited to, event notification, newsletters and announcements. For more information about email lists/ mailing rental specifics, please refer to the event procedures section.

All event promotion is done through email and online promotion. Each Chapter event will have its own webpage with online registration. The event page will include; date & time, location, speaker(s), description, registration information and any additional information to promote the event. Online registration will close 24 hours prior to the event and final meeting roster will be forwarded to the Chapter from the LES office.

The LES office will manage the Chapter's member and email distribution lists. As a Chapter Leader, you may add people to your Chapter list at anytime. Please note, in order to comply with [CAN-SPAM Act](#), you may only add people who have requested or opted into receiving LES Chapter emails. Emails cannot be added from the following lists:

- Lists purchased from a 3rd party (even if it's "opt-in")
- Lists rented from someone else
- Lexis-Nexis, Real Estate MLS databases, Advertising Redbooks, AdBase lists, D&B, Experian
- Lists from a local Chamber of Commerce or local club or organization.
- Emails "scraped" (either manually or automatically) from other websites
- Recipients whose emails you collected without their permission
- Members of a group/organization who never asked for your emails (even if you're a member of the group)
- Emails collected by Facebook or LinkedIn login. You can only send to those email addresses from your account through Facebook and LinkedIn, not LES.

For further clarification on email list and distribution policies refer to the event procedures section.

Chapter Finances

All Chapter finances shall be managed by the LES office. Chapter finances include (but are not limited to): financial reports, event revenue, expenses and bank accounts.

Each Chapter shall operate under revenue neutral procedures. The LES office will track transactions and provide set reports to Chapters. Chapters will receive regular financial reports as determined by the Chapter Trustees and the LES Finance Committee.

Chapter Surplus Funds

Chapters with an annual surplus of \$500 or more will have access to surplus funds, and must be used by April 30 of the following year. The annual surplus will be determined by December 31 financials of that year. After April 30 (of the following year), the surplus funds from the previous year are returned to LES and the account balance returns to \$0.

Chapter Event Deficits

Chapter Trustees will work with Chapters continually operating at a deficit to rectify the situation. Chapters continually operating at a substantial deficit will be considered not meeting the minimum expectations of LES Chapters. See for inactive Chapters policy for additional details.

Chapter funds are to be used for official LES Chapter events and will not be used for the following:

1. Third-party contractors (including Chapter support staff)
2. Travel reimbursement of Chapter leaders
3. Personal expenses or any other items deemed inconsistent with LES policies by the VP, Local Chapters.

Exceptions may be granted by the VP, Local Chapters upon request in writing in advance of the anticipated expense. Exceptions will not be granted when requested after the expense has been incurred.

Chapters shall not charge separate Chapters dues as part of their revenue structure.

Participation in LES (USA & Canada) Events

Chapter leaders are expected to attend local and national events as their schedules allow, and Chapter Chairs are strongly encouraged to attend the Annual Meeting that begins their leadership year. Pre-registration for all LES events (Chapter and national) is required, and is at the expense of the attendee. Participation in regularly scheduled Chapter leader meetings (in person and via conference call) is expected.

Chapter Reports

Annual reporting will include the following information:

- Confirmation that a minimum of 25 LES members reside or work in the designated service area
- Identification of a leadership team of Chair, Chair-elect and one additional position
A draft calendar of events for the coming year is submitted with a minimum of quarterly regular LES Chapter events (*Regular LES Chapter events are defined as LES Chapter as primary host with registration processed through LES website*)
- Verification of prior year finances to indicate the Chapter is functioning at a break-even level

New Chapters

As previously stated, Chapters are an extension of the national organization; working under the same strategic direction set by the Board of Trustees, and thus must be approved by the Board of Trustees. The Board may be petitioned at any time by LES members to form a new Chapter, however new Chapters may only be confirmed at board meetings. The LES Executive Committee may approve a new Chapter between board meetings if necessary.

New Chapters presented to the Board of Trustees must be endorsed by the VP, Local Chapters and will form under the following guidelines:

- A signed petition of 15 active LES Members in the designated service area indicating their interest in a new area Chapter
- A leadership team of Chair, Chair-elect and one additional position
- A draft calendar of events for the first year is submitted with a minimum of quarterly regular LES Chapter events
- A formal petition is made of the LES Board of Trustees to establish a new Chapter under signature of the forming Chapter Chair

Additional guidelines for petitioning Chapters may be found in related procedures.

Maintaining Active Chapter Status

Active Chapters must meet the following criteria:

- A minimum of 25 LES members reside or work in the designated service area
- Use a leadership team of Chair, Chair elect and one additional position
- Host a minimum of 4 quarterly regular LES Chapter events per year (*regular LES Chapter events are defined as LES Chapter as primary host with registration processed through LES website*)
- Verification of finances that Chapter is operating at or above revenue neutral.

If an LES Chapter does not meet all of the above criteria, the Chapter Trustee will work with the local leadership team to establish a plan, executable within 12 months to meet the above criteria during a probationary period.

If at the end of the probationary period, the Chapter has met the defined criteria, the Chapter will no longer be considered in a probationary period and will return to Active Status. Any Chapter that does not meet the defined criteria at the end of the probationary period will be presented to the Board of Trustees for possible deactivation.

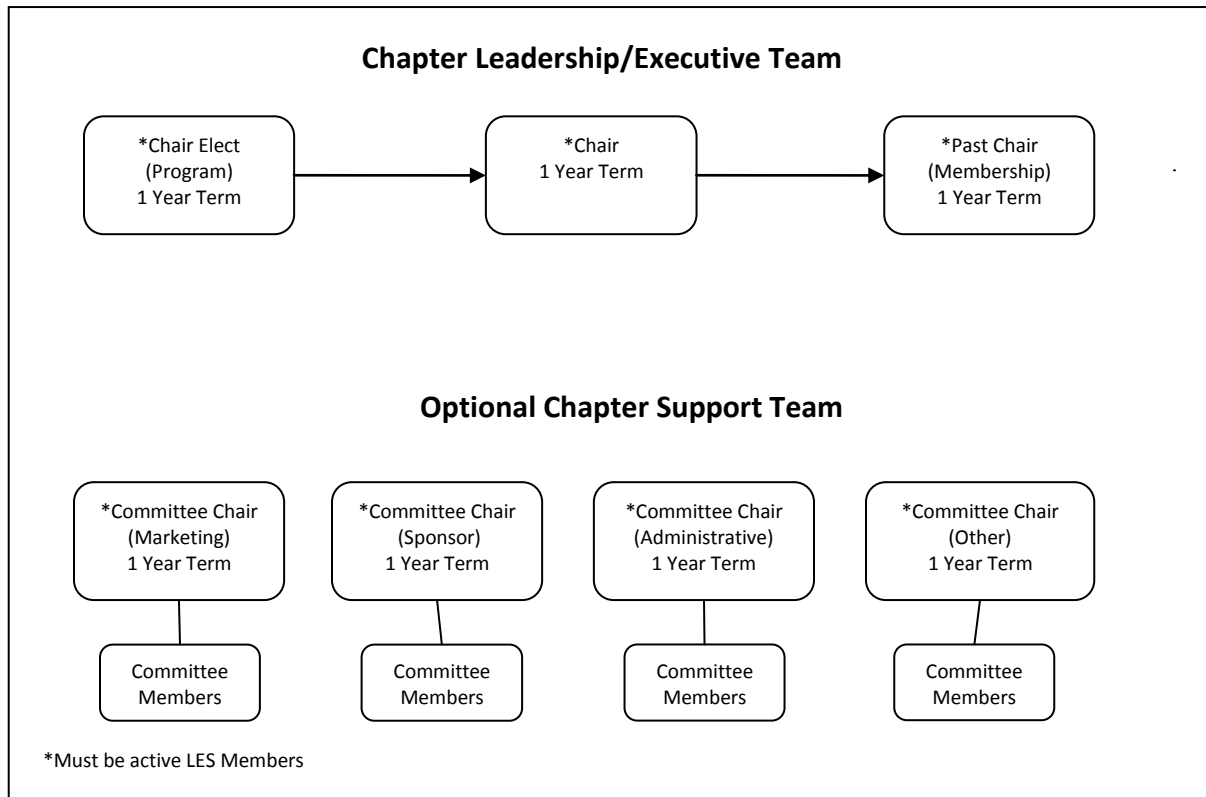
Chapter Service Areas

Chapter service areas (and thus email distribution lists) will be determined by self-identified primary Chapter selection for members and non-members as appropriate. Zip codes will also be used to determine Chapter service areas, and geographic service areas are subject to change based on Chapter development.

Structure and Roles

Each Chapter must have an executive team comprised of a Chair, Chair-elect and immediate past Chair. The Chapter may also fill additional leadership positions dedicated to education and membership, with details provided in related procedures.

LES Chapter Leadership Chart



The leadership team cycle is a 3 year commitment

Additional Chapter Committee Chair roles may include:

- Program Committee Chair
- Sponsor Committee Chair
- Marketing Committee Chair
- Membership Committee Chair
- Administrative Committee Chair

All these roles are not required in a Chapter, though successful execution of each function is critical to a thriving Chapter. It is strongly recommended that the Chair-elect, Chair and past Chair have distinct and specific responsibilities for one of the areas listed above. For example, the Chair-elect would serve as the Program Chair to familiarize themselves with all the Chapter offerings before their year as Chair. The immediate Past Chair could serve as Membership Chair, since that person would have come in contact with most members during their leadership year.

The transition between the outgoing and incoming Chapter Chairs occurs in conjunction with the LES Annual Meeting in the fall of each year. The Annual Meeting is the last official meeting for the outgoing Chairs, and the incoming Chairs assume their duties at the conclusion of the Annual Meeting.

All members of the Chapter leadership team, including executive and additional Chairs, must be active LES Members in good standing. As a part of LES (USA & Canada), Chapter leaders serve at the discretion of the LES Board of Directors, consistent with the obligations imposed by Trustees of the Board. Failure to comply with LES policies shall be grounds for removal by the LES Board.

Chapter Leader Selection

Chapter leaders may be identified in a variety of ways. Because LES Chapters are not independent entities, they do not require the election of boards with authorization from formal bylaws. Ideally, Chapter Chairs and Chairs-elect would have previous volunteer experience within the Chapter through a committee or other leadership responsibilities. The Chapter may choose to have current leadership select incoming leaders, either from the pool of current volunteers or from suggestions from the membership at large. Alternatively, Chapter membership as a whole may identify their leaders on an annual basis.

Terms of Service

Chapter leadership positions are one year terms, unless an exception is granted by the VP, Local Chapters. The maximum term of service in any one position may be 2 total years, with approval of the VP, Local Chapters.

Local Branding

All local Chapters shall be identified as "LES Chapter Name" (i.e. LES New Jersey Chapter). All Chapters shall use the LES (USA & Canada), Inc. logo when logo use is appropriate. All Chapters must conform to the usage standards of LES USA & Canada that recognize rights of use to trademark and protected marks. Details on logo access and specific usage can be found in related procedures.

Chapter Issues Escalation

Any Chapter issue shall first be presented or raised with LES staff for resolution. Past that, each Chapter is assigned to a trustee on the Board, and these trustees report to the VP of Local Chapters. If necessary, the appropriate Chapter Trustee will be involved in issue resolution. If the situation cannot be resolved by the Chapter Trustee, the issue will be escalated to the VP, Local Chapters. If further leadership involvement is necessary, the LES President will have the final say in all Chapter matters.

Section 2: Event Planning and Management

Event Submission Forms

Each Chapter will submit a LES Chapter Event submission form a minimum of 4 weeks before the event date. If a Chapter uses sponsorship, a sponsor agreement form will be required. *All sponsor payments must be received before sponsor is recognized.*

Registration Pricing

Chapter event pricing will be determined by the costs associated with the event. Since LES Chapters are expected to operate at revenue neutral, anticipated registration fees must cover anticipated expenses, unless sponsorship is secured.

All Chapter events will offer differentiated LES member and non-member pricing. The bi-furcated fee structure reinforces LES Membership benefits with a discounted fee and encourages non-members to join. All Chapter event registrations will be transacted through the LES office (via online registration), by fax or email (with official LES Chapter registration form), or onsite (with official LES Chapter registration form.) Chapters may offer a discounted student fee available only to current LES Student Members. Qualified student participants may join as a LES Student Member and receive the discounted student rate.

All Chapter event registrations will be processed online through the LES website and online payments will be in U.S. dollars or sent via fax/email/mail form forwarded to the LES headquarters. Canadian Chapters may have alternative online registration arrangements due to currency issues.

CLE Credit

Some LES Chapters offer Continuing Legal Education (CLE) credit for their events to attract legal professionals, and this practice is encouraged when reasonable for the Chapter. It is the responsibility of the Chapter to apply with their local bar association for their desired event. Payment for any CLE related fees will come out of the event budget for which CLE credits are sought. The LES office is available to assist with this process as needed, and for more information or questions about CLE please contact chapters@les.org.

Marketing and Outreach

LES Chapter events are promoted through the LES website and email blasts. LES emails will be created (using standard formatting and branding) and sent from LES headquarters. Up to 3 email blasts will be sent per Chapter event, provided the event is submitted to headquarters with enough advance notice. Chapter event email notices will not exceed one per week and the email distribution schedule will be provided upon submission of the Chapter Event Form. Chapter leaders may promote event outreach to local networks and contacts independent of the LES Chapter email distribution list.

Chapter Email Marketing Schedule (assumes the minimum 4 week notice to LES office)

Announcement (Email 1): Email sent within 3 business days of receipt of event submission form

First Reminder (Email 2): Email within 2 weeks prior to the event

Final Reminder (Email 3): Email sent within 24-48 hours before event

Email Promotion outside of the defined primary Chapter service area should be done in partnership with other Chapters as appropriate. As Chapter service areas overlap, Chapters are encouraged to work with each other for event promotion and collaborate on programming when beneficial.

Sponsorship

LES Chapters may solicit sponsorship to offset event costs. Sponsorship may include donated meeting space or facilities (in-kind) or a cash contribution (event subsidy.) Sponsors receive recognition through event promotion and website and may submit their organization's logo to be included in the promotional event materials. For more information about sponsorship, please refer to the Chapter Sponsorship Policy section.

Event Forms and Templates

Chapter will be responsible for printing and distributing name badges and attendance lists. LES office will provide name badge templates, attendance roster templates and supplies (badge holders, lanyards, etc.) Additional supplies are available on a per request basis.

Onsite Event Management

Chapter leaders and/or volunteers should arrive early to setup the registration area. Registration area must be staffed by at least 1 Chapter leader or Chapter volunteer and will include:

- Printed name badges and holders
- Expected Attendance roster
- Sign-In Sheet
- Onsite Registration forms
- LES Promo materials (Membership forms, meeting brochures, etc.)
- Other forms as needed, including CLE forms.

Chapter Event Talking Points

At every Chapter event the following items should be addressed. Below is a list of suggested talking points for the Chapter Chair to use:

- Introduce Chapter leaders and welcome attendees
- Highlight LES Membership benefits and upcoming LES national meetings
- Introduce speaker(s) and thank sponsor(s) as appropriate
- Present speaker(s) with gift at the conclusion of the presentation
- Thank attendees and promote online evaluation form (will be sent within 24 hours)

Onsite Registration

Most attendees pre-register for events, and it is encouraged to offer onsite registration. All onsite attendees **must** complete a Chapter registration form and provide payment information (check or credit card) at time of registration. Registrants may attach a business card in lieu of completing the contact information section. If cash payments are received, a money order should be purchased and sent to LES instead of the cash itself. **Do not send cash in the mail!**

Chapter Event Evaluations

Online event evaluations will be sent from the LES office within 24 hours of the event's conclusion. A standard online survey will be used gather feedback and comments and the Chapter may add 1 additional question per event. Click [here](#) to view the sample Chapter event online survey.

LES Promotional Materials

LES promotional materials (Seasonal, Annual Meeting, LES Education, LES Membership brochures or other related materials) will be shipped annually to Chapters to display and distribute at events. Additional materials may be requested at any time throughout the year.

Speaker Gifts

It is customary for Chapter leaders to recognize speakers and present an LES speaker gift at the conclusion of the event. Speaker gifts are available from the LES office and will be shipped via ground service. The Chapter will be charged for expedited shipping service.

Post Event Reporting

Chapter will submit the following items no later than 1 week following the event:

1. Completed post-event checklist
2. Onsite event sign-in sheet and onsite registration forms (including payment)
3. LES Chapter Payment form for vendor expenses

Chapter Payments

All vendors are to be paid via check during the regular LES payment cycle. Alternative payment options may be available and require advance approval from the LES office.

LES has 2 check payment cycles per month, the 15th and last business day of the month. All Chapter payment requests must be received 24 hours before the scheduled payment cycle to ensure processing. All vendor invoices and reimbursement requests must be submitted to the LES office within two weeks of receipt at the local level. Payment requests received more than **14** days after the event will not be paid.

LES Education Programs

Qualified LES Chapters may offer LES Education workshops or courses. Interested Chapters may complete the Chapter Education Program Proposal Form and submit to the LES office. The completed form will be submitted to the Chapter and Education Trustees. Once approved, the Chapter will work directly with LES staff to execute the program.

Chapter Surplus Funds From Education Events

Surplus funds (after all costs are covered) will be divided evenly (50-50) between the Chapter and the LES Education budget. The Chapter must submit a "Special Event Proposal" to LES office to use education surplus funds. For additional information on Chapter surplus funds, please see the Chapter finances section.



Around the World

"Around the World with LES" is an annual celebration of the World Intellectual Property Organization's (WIPO) [World IP Day](#) on April 26. Each LES Chapter will participate by hosting an event on April 26. The event does not need to be a formal program, and a simple networking event is encouraged. **Since no other LES Chapter events will be scheduled in the month of April, Chapters may hold a regular Chapter meeting on April 26; however, it is recommended that networking be incorporated into the event.** Additional information on ATW will be provided on an annual basis for Chapter leaders.

Section 3: Chapter Partnerships and Sponsorship

Partner Event Promotion

LES Chapters may be approached by local organizations to promote non LES events. All requests should be submitted to the LES office for vetting. The partner group may have a national partnership agreement with LES and will be verified by the LES Marketing department. If no such agreement exists, LES can offer local partners event promotion on the Chapter website and inclusion with regularly scheduled Chapter event announcements. **Partner events scheduled within 4 days of any LES Chapter or national event or program will not be eligible for promotion.**

Joint Events

It may be in the interest of a local Chapter to hold a joint event with another organization. A partner organization must be a non-profit with goals compatible with the LES (USA & Canada.) A joint event should not be a way for a Chapter to disguise otherwise unacceptable sponsorship.

All joint events should display, equally, the LES organization (including the LES (USA & Canada) logo) and the co-organizer(s) on all documentation and promotional materials in a way that fully demonstrates the involvement of LES (USA & Canada) in the preparation, organization and holding of such event. The Chapter Trustee must be notified within a reasonable period of time prior to the date of any such joint event.

Chapters Sponsorship Policy

In order to provide LES Members with quality local meetings and execute revenue neutral events the Licensing Executives Society (U.S.A. and Canada), Inc. ("LES (USA & Canada)") will permit paid sponsorship at its local Chapter meetings taking into account LES (USA & Canada)' culture and tradition in providing educational meetings and a positive atmosphere for networking.

Meeting Sponsorship Availability

Sponsorship in accordance with this policy will be available at the local Chapter meetings only.

LES Chapters' Goals

The goals of local Chapter meetings is to provide a local forum to further develop knowledge in the field of licensing and technology transfer and provide an effective networking environment for LES Members and licensing professionals.

Sponsorship Guidelines

The intent of sponsorship guidelines is not to discourage such sponsorship but merely to define the parameters that are aligned with the LES (USA & Canada) culture and tradition. LES Chapters should take advantage of the many possibilities offered to them by the LES office with respect to mailings, e-mails, faxes and web hosting in order to cut down on the operating costs of a local Chapter.

- While LES (USA & Canada) recognizes that sponsors need to have a certain visibility, sponsorship of an event should not take over the event, the overall visibility of sponsors should remain low key. More generally, the benefits provided to the sponsors should not overpower the local meeting event with logo presentations, sponsor signage, etc.
- Email and website marketing with respect to an event should be preeminently showing the LES (USA & Canada) logo and LES (USA & Canada) as the organizer of the event, sponsors should be recognized as sponsors only.
- Sponsors are not permitted to make a "sales speech" to the members and guests in attendance at a local meeting, though may be allowed to introduce themselves and their organizations as appropriate.

- Acknowledgement of sponsors in email or web format will be placed at the end or the bottom of the page and should be small and discrete. Generally, it is preferred that only the sponsor's logo appears. If the Chapter leader believes that some text should appear, this should be no more than one or two sentences. In no instance should acknowledgments take more than 15 to 20% of the entire document (including logos).

- Sponsorship at the local event may take the following forms:
 1. Loaning of meeting space for the LES event;
 2. Subsidizing of audiovisual equipment;
 3. Subsidizing networking reception
 4. Subsidizing all or part of the catering expenses

All sponsors may be acknowledged by the Chapter leader at the beginning or at the end of the event, space on the LES email/website and publicity for the event or a reasonable prompt or sign at the door outside the room for the event.

- All material necessary for providing the benefits to sponsors should be furnished in advance to the meeting Chair (or organizer) by the sponsor.
- Full payment is required prior to the event.
- A maximum number of sponsors should be decided upon in advance for each event sponsors should not exceed four at one event except in special circumstances.

Section 4: Chapter Resources and Tools

Chapter Leader Newsletter

Monthly newsletter sent to all Chapter leaders providing timely information on upcoming LES Chapter events and activities and LES national meetings and programs.

Chapter Calendar

The Chapter Calendar is a new tool for Chapter Leaders and includes important 2011 dates and deadlines. Click [here](#) to download/view the LES Chapter Calendar.

LES Website

As Chapter events are submitted to the LES office, they are added to the [master calendar](#) of all LES Chapter events. The calendar can be a valuable resource when looking for topic or speaker ideas from other Chapters since all Chapter events are listed here.

Additionally, each Chapter has its own webpage that can be used not only to communicate upcoming events, but additional chapter news, leadership information, etc. All webpage changes and edits may be submitted to chapters@les.org.

Chapter Leader Open Mic Call

The Open Mic call is a monthly forum for LES Chapter Leaders and Trustees to discuss challenges, opportunities, needs, and best practices.

Questions about the LES Chapter Leadership Manual

If you have any questions with respect to the implementation and interpretation of these guidelines, please contact the LES office or the appropriate Chapter Trustee.

Caroline Rockafellow

LES (USA & Canada) Vice President for Local Chapters
caroline.rockafellow@syngenta.com

Betty Koutsogiannis

Trustee for Local Chapters (East)
pbk@robic.com

Hilton Sue

Trustee for Local Chapters (West)
hsue@patentable.com

Curtis Gore

LES (USA & Canada) Chapter Relations Coordinator
cgore@les.org



Licensing Executives Society
(U.S.A. and Canada), Inc.

LES Chapter Report

LES _____ **[insert City or Region]** CHAPTER
ANNUAL CHAPTER REPORT 2011-12

1. Chapter Leadership

Required Positions

Chair:

Chair Elect:

Additional Chair or Past Chair:

Additional Optional Positions

Sponsorship Chair:

Logistics Chair:

Marketing Chair:

Education Chair:

Membership Chair:

2. Goals

Please list goals for the upcoming year

LES CHAPTER 2011-2012 MEETING SCHEDULE

4th Quarter 2011

TOPIC:

DATE:

LOCATION:

1st Quarter 2012

TOPIC:

DATE:

LOCATION:

2nd Quarter 2012

Around the World

April 26

LOCATION:

3rd Quarter 2012

TOPIC:

DATE:

LOCATION:



Licensing Executives Society
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New LES Chapter Plan
LES _____ **[insert City or Region]** CHAPTER
ANNUAL CHAPTER PLAN 2011-2012

1. Chapter Leadership **Required Positions**
Chair:
Chair Elect:
Additional Chair:
Additional Optional Positions
Sponsorship Chair:
Logistics Chair:
Marketing Chair:
Education Chair:
Membership Chair:
2. Meeting Schedule *Please fill in the Future Meeting Schedule on the next page*
3. Chapter Goals *Please list goals for the first year.*
4. Targeted Licensing & Technology Community *Please list corporate, government, and academic licensing organizations in the Chapter area*



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LES Chapter Event Submission Form

*Chapter	Chapter Name
*Date & Time	Date & Time, Additional Schedule if applicable
Title or Topic	Title or Topic of event. Not required for Save-the-Date but highly recommended for full meeting announcement
*Location	Full address; phone and website are encouraged
Speaker(s) or Panelists w/ moderator	List all speakers, panelists, moderators, and their titles and organizations
Registration Fees	Early by: Regular & Onsite LES Member: LES Member: Non-Member: Non-Member: LES Student Member: LES Student Member:
Description	Description of event title.
*Event Contact(s)	Chapter contact information for questions about the meeting or event location. Please list no more than 2 people
Sponsors	List all sponsors and type of sponsorship; in-kind (donated meeting space, catering, etc.) or cash contribution. Please complete LES Chapter Sponsor Form.
Speaker Bio(s)	List all speaker bios to be posted on all LES website
Notes	Insert additional information or notes here such as directions, etc.

*required for save-the-date notice

LES Chapter Event Budget Worksheet

Estimated Attendees

Provide an estimated number of attendees based upon recent meeting and historical trends.

Anticipated Catering Costs

Provide catering guarantee number and per person cost

Meeting Space Costs

Provide meeting space rental costs

Other Costs

List all other costs associated with the event including AV,

Total Cost per person

Provide Total Cost per person for the event. Total cost per person is the total catering, meeting space, and other costs divided by the total number of anticipated attendees.



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Chapter Sponsorship Payment Form

Submit via email, chapters@les.org or fax, 703-836-3107

Chapter:

Event Date:

Chapter Leader:

Sponsor will support the Chapter in the amount of \$ _____

Sponsor Organization:

Sponsor Contact:

Title:

Address:

City:

State/Province:

Zip:

Phone:

Email:

Payment

- 1. Credit Card: AMEX VISA MasterCard

Card Number: _____ Exp: _____

Name on Card: _____

- 2. Pay by Check:
Make check payable to **Licensing Executives Society**

Mailing Address:
Licensing Executives Society
Att: LES Chapters
1800 Diagonal Road, Suite 280
Alexandria, VA 22314

Chapter Approval: _____ **Date:** _____

Sponsor Logo

- Submitted with this payment form
- Will be submitted to LES office at a later date



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LES Chapter Pre-Event Checklist

- Submit LES Event Submission form 4-6 weeks prior to event.
- If applicable, apply for CLE credit 4 weeks before event.
- Submit LES Chapter payment form for all required catering deposits, 2-4 weeks before the event.
- Confirm event count with caterer 1-3 days before event.
- Outreach to personal contacts and local networks to supplement LES blast emails.
- Order event supplies from LES office (2 weeks prior to event)
 - Badge holders and inserts, lanyards
 - Speaker gifts
 - LES promotional materials



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**LES Chapter Event Checklist
(Day of Event)**

- Bring registration supplies:
 - Name badges
 - Onsite reg forms
 - LES promotional materials
 - Speaker gifts

- Confirm event count with caterer 1-3 days before event.

- Chapter leader arrives at least 30 minutes early to setup registration table and familiarize to meeting space layout.

- Chapter leader or committee member staffs registration table and assists with onsite registration and event check in.

- Chapter leader opens meeting and welcomes participants and promotes LES Membership and current promotion. Highlights upcoming LES national event (seasonal or annual meeting.)

- Chapter leader introduces speaker.

- At the conclusion of the program portion, Chapter leader thanks speaker(s) and presents gift.

- Event evaluations; let attendees know online evaluation will be sent within 24 hours.



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LES Chapter Post-Event Checklist

- Mail or email all post event documentation within 1 week of event.
 - Onsite registration forms with payment
 - LES Chapter payment forms with invoices/receipts
 - Event sign-in sheet
 - CLE sign-in

- Submit speaker's presentation (with speaker approval) to LES office.



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Chapter Meeting - Payment Request

(Please list only one payment per form)

All expenses will be processed on the 15th and last business day of the month

Submit via email, chapters@les.org or fax, 703-836-3107

Chapter:

Chapter Co-(Chair):

Chapter Event Date:

Issue Check to:

Check Amount:

Address:

Please attach invoice and/or receipt(s)

Notes:

Chapter Chair Approval:

Date:

LES USE ONLY

Reviewed/approved by _____ *Date:* _____

Account to be expensed: 40-5400- _____ *Month:* _____



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Chapter Education Course Proposal

Submit via email, chapters@les.org or fax, 703-836-3107

Since 2009, LES Chapters have offered LES Education courses. LES Chapters may apply to host an education course with the below proposal form which outlines potential audience and available Chapter resources. The form will be submitted to the LES office for review and approval by the appropriate LES Trustees. The Chapter's proposal will be evaluated on its own merits, in conjunctions with the LES Education Committee goals and strategic plans. If approved, LES staff will work with the Chapter Leadership team to select qualified instructors and develop a planning schedule.

IP & Licensing Basics: A One-Day Review (Formerly PDS 100)

This one-day course provides a survey of the basics of intellectual property (IP) and licensing. It builds a practical understanding of core IP and licensing concepts from both the business and legal perspectives. Each course, taught by both legal and business experts working as a team, is divided into five topics with examples, exercises and interaction between instructors and fellow students. Topics include: Introduction to IP; Basics of IP Commercialization & Licensing; Determining Reasonable License Fees & Royalty; Managing Risks; and a Licensing Case Study.

Schedule: 1 day, 8:30 AM – 5:30 PM
Breakfast & Registration 7:30 AM – 8:30 AM
Course: 8:30 AM – 5:30 PM
Networking Reception: 5:30 PM – 6:30 PM

Faculty required: 2 minimum, 3-4 max; 1 qualified business instructor and 1 qualified legal instructor. Both instructors will have taken the IP Basics course and the Train-the-Trainer workshop.

Logistics requirements

- Meeting space to host 30-40 participants comfortably
- AV; laptop, projector, screen, 6-8 flip charts, preferably on easels

Catering requirements

Continental breakfast, morning break, lunch, afternoon break, networking reception

Sponsorship: Chapter must secure at least 1 sponsor to offset meeting space and/or catering expense

Registration Fees

\$195 LES Member & Non-Member
\$125 University Faculty
\$35 LES Student Member (includes 1 year LES Student Membership)

IP Basics Responsibilities & Resources

LES Staff

- Develop approved instructors
- Online Registration
- Email marketing & website
- Print and ship course materials

LES Chapter

- Select Course location and secure sponsorship
- Instructor coordination
- Local marketing & outreach
- Manage onsite registration

Chapter Education Course Proposal Form
Submit via email, chapters@les.org or fax, 703-836-3107

Chapter:

Chapter Education Chair or Chapter Leader:
(Primary contact and course coordinator)

Desired Education Course Date:

How many Chapter events hosted in the past year?

What is your average attendance for your LES Chapter events?

How many LES Education courses has your Chapter hosted?
(Please list all courses and attendance in the past 24 months)

Who are the potential participants in your Chapter area?
(companies, universities, legal, etc.)

Please list all potential local sponsors and level of support

Chapter Signature

Date



Licensing Executives Society

(U.S.A. and Canada), Inc.

Chapter Special Event Submission Form

For use of surplus funds in excess of \$500

Chapter	Chapter Name								
Date & Time	Date & Time, Additional schedule if applicable								
Chapter Surplus or Award amount	The amount of surplus funds or Chapter award funds to be used								
Purpose	How will this event benefit the local LES Membership and community?								
Location	Full address; phone and website are encouraged								
Title or Topic	Title or Topic of event. Not required for Save-the-Date but highly recommended for full meeting announcement								
Speaker(s) or Panelists w/ moderator	List all speakers, panelists, moderators, and their titles and organizations								
Registration Fees	<table border="0"><tr><td>Early by:</td><td>Regular and Onsite:</td></tr><tr><td>Member:</td><td>Member:</td></tr><tr><td>Non-Member:</td><td>Non-Member:</td></tr><tr><td>LES Student Member:</td><td>LES Student Member:</td></tr></table>	Early by:	Regular and Onsite:	Member:	Member:	Non-Member:	Non-Member:	LES Student Member:	LES Student Member:
Early by:	Regular and Onsite:								
Member:	Member:								
Non-Member:	Non-Member:								
LES Student Member:	LES Student Member:								
Description	Description of event title.								
Event Contact(s)	Chapter contact information for questions about the meeting or event location. Please list no more than 2 people								
Sponsors	List all sponsors and type of sponsorship; in-kind (donated meeting space, catering, etc.) or cash contribution. Please complete LES Chapter Sponsor Form.								
Speaker Bio(s)	List all speaker bios to be posted on all LES website								
Notes	Insert additional information or notes here such as directions, etc.								

LES Chapter Special Event Budget Worksheet

Estimated Attendees	Provide an estimated number of attendees based upon recent meeting and historical trends.
Anticipated Catering Costs	Provide catering guarantee number and per person cost
Meeting Space Costs	Provide meeting space rental costs
Other Costs	List all other costs associated with the event including AV,
Total Cost per person	Provide Total Cost per person for the event. Total cost per person is the total catering, meeting space, and other costs divided by the total number of anticipated attendees.

Event Approval
(to be completed by Chapter Trustee)

Chapter Trustee Signature

Date