

CASE

Conferences

COUNCIL FOR ADVANCEMENT
AND SUPPORT OF EDUCATION®

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www.case.org

An Invitation to Sponsor and Exhibit

Breaking the Mold:

**18TH Annual Conference for
Institutionally Related
Foundations**

April 13-16, 2010

Hyatt Regency Coconut Point
Bonita Springs, FL

Reserve your hotel room by March 22, 2010, to receive a discounted rate! Call the hotel to make your reservation at (239) 444-1234 or go online to www.coconutpoint.hyatt.com.

For details on conference sessions, speakers, and more go to www.case.org

Enter CASE Code: **IRF**

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Breaking the Mold: 18th Annual Conference for Institutionally Related Foundations

Hyatt Regency Coconut Point
Bonita Springs, FL

April 13-16, 2010

Dear Colleague,

CASE invites you to attend our upcoming **18th Annual CASE Conference for Institutionally Related Foundations, Breaking the Mold**, April 13-16, 2010, at the Hyatt Regency Coconut Point in Bonita Springs, FL.

In the aftermath of the economic downturn, institutionally related foundations face a new reality. How can foundation leaders take advantage of this opportunity to strengthen their organizations and improve results?

Join us for two and half days of sharing strategies and best practices to make the most of this “new normal.”

This important annual meeting affords opportunities for sustained interaction with the key decision-makers of public college and university foundations. The 2009 conference attracted more than 75 delegates, including chief executives, finance officers, and other executives of foundations affiliated with university systems, research universities, state universities and colleges, community colleges, and medical foundations.

CASE offers several ways you can participate and gain visibility among conference attendees. The atmosphere of the meeting is relaxed and collegial. Exhibits are adjacent to the main meeting space where breakfasts and breaks are hosted. Receptions and other social events provide further opportunities for informal discussion and interaction. Sponsors and exhibitors are invited and encouraged to participate in all conference sessions and events.

Your presence at the conference will bring value to the program and will give the attendees an opportunity to meet you personally. We hope you take advantage of this opportunity and be a part of the conference.

For **sponsorship** inquiries, please contact Lori Woehrle at (202) 478-5697 or woehrle@case.org.

For **exhibiting** opportunities, please contact Wanda Freeman at (202) 478-5636 or freeman@case.org



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Program Highlights:

Welcome & Keynote

Featuring: Lawrence Kochard, Chief Investment Officer, Georgetown University

Rethinking the Foundation Business Model

Moderator: Tom Mitchell, President, University of California, Irvine Foundation

Economic Market Forecast

Speaker: Sean Snaith, Economist, University of Central Florida

Higher Education Philanthropy Outlook

Speakers: Patrick Rooney, Executive Director, The Center on Philanthropy at Indiana University and Eugene Tempel, President, Indiana University Foundation

IRS Update

Speaker: Lois Lerner, Director, Exempt Organizations, IRS

Optional Seminar: Update on FASB Activities

Speaker: Jeffrey Mechanick, Assistant Director, Financial Accounting Standards Board

Plus numerous elective sessions covering foundation funding sources, audit management, underwater endowments and spending policies, Form 990, investments and risk management, and more!

For details on conference sessions, speakers, and more go to: www.case.org. Enter CASE Code: **IRF**

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Who should attend?

- Foundation CEOs and executive directors
- Foundation financial officers
- Foundation operations officers
- Foundation counsel
- Other senior staff or volunteers who play a role in foundation management

Conference Chair: *Elizabeth Banycky*
Treasurer, Southern Illinois University Foundation

Conference Staff: *Brian Flahaven*
Director of Government Relations

Lisa Ramirez
Educational Programs Manager

Where You'll Stay

For details on
conference
sessions,
speakers, and
more
go to:

www.case.org

Hyatt Regency Coconut Point

5001 Coconut Road
Bonita Springs, FL 34134
Phone: (239) 444-1234

Deadline to receive hotel rate: March 22, 2010

Room Rate: \$290.00 (single or double, plus tax)

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Sponsorship Opportunities

Welcome Reception (\$5,000 Contribution)

- Prominent recognition as a primary supporter throughout the conference, in program marketing materials, on the conference Website
- Receive 4 complimentary registrations allowing staff to attend all conference events
- Use of a 6-foot skirted exhibition table with electric outlet for the entire conference
- Special recognition at the Welcome Reception on Tuesday, April 13, 5 – 7 PM

Affinity Luncheon (\$5,000 Contribution)

- Prominent recognition as a primary supporter throughout the conference, in program marketing materials, on the conference Website
- Four complimentary registrations allowing staff to attend all conference events
- Use of a 6-foot skirted exhibition table with electric outlet for the entire conference
- Special recognition at the Affinity Luncheon on Thursday, April 15, 12 – 1:30 PM

Continental Breakfast (\$3,500 Contribution)

- Prominent recognition as a primary supporter throughout the conference, in program marketing materials, on the conference Website
- Two complimentary registrations allowing staff to attend all conference events
- Use of a 6-foot skirted exhibition table with electric outlet for the entire conference
- Recognition at one breakfast on Wednesday (April 14) or Thursday (April 15)

Refreshment Break Package (2 breaks) (\$3,500 Contribution)

- Receive prominent recognition as a primary supporter throughout the conference, in program marketing materials, on the conference Website
- Two complimentary registrations allowing staff to attend all conference events;
- Use of a 6-foot skirted exhibition table with electric outlet for the entire conference
- Recognition at two refreshment breaks on Wednesday or Thursday, April 14 or 15

Customized sponsorships are also available. Please call Lori Woehrle at (202) 478-5697 for more information.

Exhibitors

- Will be introduced to conference delegates and on the Website
- Receive 2 complimentary registrations allowing staff to attend all conference events
- Have the use of a 6-foot skirted exhibition table with electric outlet throughout the conference

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SPONSORSHIP REGISTRATION FORM

My company would like to sponsor: *(check all that apply)*

\$5,000 Contribution

- Welcome Reception, Tuesday, April 13, 5-7 PM
- Affinity Luncheon, Wednesday, April 14, 12-1:30 PM

\$3,500 Contribution

- Continental Breakfast, Wednesday, April 14, 7-8 AM
- Continental Breakfast, Thursday, April 15, 7-8 AM
- Refreshment Break Package (2 breaks)

Please contact
Lori Woehrle or
Wanda Freeman,
partners@case.org
to reserve your
sponsorship or
fax your form to
(202) 332-1964.

If you don't see a
sponsorship that
meets your needs,
please call Lori
Woehrle.

For details on
conference
sessions,
speakers, and
more
go to:
www.case.org

Name _____

First Name on Badge _____

Title _____

Company _____

Address _____

City/State/Zip _____

Phone _____ Fax _____

E-mail _____ Web Address _____

Please provide company description or email to freeman@case.org (35 words or less):

**Enter CASE Code:
IRF**

Payment Information	For CASE use: 5810-51001
CHARGE to: <input type="checkbox"/> VISA <input type="checkbox"/> MasterCard <input type="checkbox"/> American Express	
Account Number	Exp. Date
Cardholder's Signature	Date
<input type="checkbox"/> A CHECK payable to CASE is enclosed.	
Mail to: CASE, Dept 4022, Washington, DC 20042-4022.	
NOTE: When mailing, please allow at least 2 weeks for delivery and processing.	

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TABLETOP EXHIBIT REGISTRATION FORM

Please contact
Wanda Freeman at
(202) 478-5636 or
freeman@case.org to
reserve your exhibit
table or fax your form
to (202) 332-1964.

Tabletop registration includes:

- One 6' table for tabletop exhibit
- Exhibitor identification page in packet
- Copy of onsite program materials including one-time use of registration list
- Two complimentary registration with access to sessions and events

Tabletop Exhibit Fees per Conference:

- | | | | |
|---|----------------|--|----------------|
| <input type="checkbox"/> CASE Educational Partner | \$1,850 | <input type="checkbox"/> Non-Educational Partner | \$2,065 |
| <input type="checkbox"/> Additional Reps | \$375 | <input type="checkbox"/> Additional Reps | \$ 550 |

Cancellation Policy

If CASE receives your Exhibit booth cancellation

- **At least three weeks before the conference start date**—You will receive a full refund.
- **One to two weeks before the conference start date**—You will be refunded your registration fee for your exhibit space less a \$200 processing fee. Additional company rep. cancellation will receive a refund less a \$60 processing fee.
- **Less than one week before conference start date**—You will not receive a refund.
- **“No Shows”**—You will not receive a refund.

CASE reserves the right to cancel any program. CASE is not responsible for any cancellation or change fees assessed by airlines, hotels or travel agents.

Name _____

First Name on Badge _____

Title _____

Company _____

Address _____

City/State/Zip _____

Phone _____ Fax _____

E-mail _____ Web Address _____

Please provide company description or email to freeman@case.org (35 words or less):

Payment Information:	For CASE use: 5520- 51001
CHARGE to: <input type="checkbox"/> VISA <input type="checkbox"/> MasterCard <input type="checkbox"/> American Express	
Account Number	Exp. Date
Cardholder's Signature	Date
<input type="checkbox"/> A CHECK payable to CASE is enclosed. Mail to: CASE, Dept 4022, Washington, DC 20042-4022. Fax to: (202) 332-1964	
NOTE: When mailing, please allow at least 2 weeks for delivery and processing.	