

# Corporate Relations

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The purpose of these corporate relations policies is to document the policies and procedures governing all Healthcare Businesswomen's Association's components, including regions, chapters, and volunteer committees. These policies and procedures establish guidelines for achieving goals and objectives including:

- Increasing the number of HBA corporate partners and sponsors
- Engaging current corporate partners
- Soliciting chapter and regional sponsorships
- Working with chapter and regional committees to satisfy venues/space needs for events
- Providing a platform for industry visibility and exposure
- Managing and safeguarding the association's funds

## Corporate partnership sales

All HBA representatives must abide by the corporate partner packages provided by the HBA, which are updated annually and found [here](#). A corporate partnership is an agreement between a company and the HBA at a global level, therefore the relationships are managed by the HBA Central account management staff. Companies purchasing these packages receive certain benefits for their level of commitment to the HBA, which are also administered at a global level.

Request for changes to the standard package offerings must be discussed with and approved by the HBA Central business development team. Corporate partner package sales must follow the appropriate procedures as outlined [here](#).

## Sponsorships

All HBA components (i.e. chapters, regions, affinities, etc) must abide by the sponsorship package rules created and distributed by the HBA. Sponsorships can be cash or in-kind donation to the HBA and are entirely separate from the HBA Corporate Partnership.

Sponsorship packages for regional/chapter events are listed [here](#) and are available for events held in-person, hybrid, and virtually. Sponsorship benefits provided should align with the outlined packages whenever possible.

**All sponsorship sales (both cash and in-kind) must follow the appropriate [event sponsorship processing procedures](#)** to ensure the appropriate paperwork has been completed for the HBA's financial accounting purposes.

Corporate Relations volunteer leaders and committee members must work together (with other regional departments and local chapters/components within the geography) to align and develop strategic plans for contacting current HBA corporate partners to request event sponsorship support. Sponsorship solicitations should not be conducted on a last-minute basis or where the benefit to the company is not evident.

Event sponsors must be called only "sponsors" and not "corporate sponsors."

## Reporting

Each region should keep an up-to-date list of all prospects, sponsors, and corporate partners within their geography. Corporate relations leaders and volunteers should update this list as needed to track communications and revenue for past and upcoming events, prospects for sponsorships and corporate partner packages, local sponsorship agreements from corporate partner companies within their area, and other major engagement developments. The HBA central corporate relations team can provide templates for reporting trackers that can be imported into the HBA CRM system for tracking and reporting.

## Business Development Policies

To help our regional business development teams better demonstrate the value of the HBA to potential prospects, the HBA offers a program to encourage individuals from new prospect companies to attend one HBA event at no charge. Currently, there is no option available to prospective companies to experience the value of the HBA programming and learn all that the HBA has to offer before entering into a formal sponsorship or Corporate Partnership agreement. This will be reviewed regularly to measure success and adherence to the policy guidelines to avoid code abuse. [Please view the full policy here.](#) Codes are created and sent annually to the regional corporate relations leadership upon request.

## Reports access

Corporate relations leaders have access to real-time company, membership, and event attendance reports for their region to better inform their strategy. Compliance by leaders on the below guidance is required.

*Membership reports:* personal information shared in membership reports cannot be used for personal reasons. If planning to do any direct outreach to members for any reason, the leader must first coordinate with the Membership Experience department to avoid any conflicts with current outreach campaigns, to see if the two teams can coordinate their outreach and/or to see if the outreach fits into any other overall member engagement strategies currently ongoing.

*Event reports:* personal information shared in event attendance reports cannot be used for personal reasons. Information gleaned from these reports should inform BD and CE strategy and in-person conversations, but not result in any direct outreach to attendees via email or phone.

**Please note:** mass emails should never be sent to large groups as the HBA must remain compliant with US federal CAN-SPAM laws and European GDPR regulations.

## Corporate Relations Functional calls

Corporate relations functional calls will be held each month and will be arranged by the HBA Central corporate relations team or Operating Board leaders. These calls will be required for the CR leadership (President, VP and Regional Directors) and will include the opportunity for sharing information on best practices, news, and best practices.

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