

MCFS Events Policy 2009

MCFS events are intended to be unique. Presentations to MCFS events should ideally be of interest to both practitioners and academics.

MCFS run events with the objective of stimulating debate and developing opportunities for academic research. A characteristic of MCFS events is the high degree to which they promote critical thinking and the application of financial research.

Events are a key part of MCFS activity. They should play their part in supporting the infrastructure of the Centre. Beneficiaries of MCFS activity, particularly industry practitioners, should pay their way. For those reasons we will charge for attendance and seek sponsorship support.

Philosophy and Objectives

The decision to conduct events will be made on the following criteria:

1. The event must be consistent with MCFS strategy
2. The event must be a good business proposition
3. The event must be a quality product i.e. academically sound and capable of enhancing the MCFS brand.

Hence, the Operational Objectives of the MCFS event program are:

- a) Income
- b) Involve key partners – on a regular/consistent basis
- c) Involve academics - to highlight expertise and promote knowledge transfer
- d) Address key research areas with intention of stimulating research
- e) Build on existing MCFS strengths - especially past events

Requirements of partners

1. No selling; presentation must be educational in focus. (In practice, all MCFS events must be suitable for attribution of continuing professional development CPD points under PS146.) However, marketing-type presentations may be acceptable for launches of products and services.
2. MCFS will generally require at least one month to properly develop and promote events.
3. MCFS must see a copy of the presentation, or paper on which it is based, prior to agreeing to host an event.
4. Presentations which fit into the MCFS research focus categories will be given priority. (Funds management, Insurance and Risk Management, and Banking and Financial Institutions.)
5. MCFS will not compete on price with other near comparable providers e.g. professional and industry associations.
6. MCFS reserve the right to decline presentation opportunities which do not accord with the above principles or which are counter to the objectives of the Centre.

Assumptions

1. No presenter Fees – except where covered by sponsorship
2. No presenter travel – except where covered by sponsorship
3. Presenter Accommodation incorporated in budgets for conferences only
4. No hire of Equipment where venue partner/sponsor
5. No Mail out Costs/Postage - all email
6. No Brochure Design - all in-house
7. No Advertising - placement & design costs
8. Academics do not pay for 2 hour of less events, and pay half price for half day or higher.
9. The only planned free events going forward will be academic seminars where we do not have a sponsor. These will generally be held at a university campus

Other elements

- o Events can be packaged into other activities e.g. funded research

MCFS Events Pricing Policy 2009

(all prices are excluding GST)

Sponsorships

\$2,500	Finance Forums - with no venue partner/sponsor (i.e. maybe lower)
\$3,000	Academic seminar - no sponsorship assumed but may be sought subject to approval of academic speaker(s)
\$7,000	Half-day conference (with lunch)
\$10,000	One day conference (with lunch)

**Venue partner provides room, tea-coffee, AV but no additional catering

*Venue sponsor provides catering plus room, tea-coffee, AV

Charging scheme

\$90	Academic seminars
\$90	Finance Forums - with venue sponsor*
\$120	Finance Forums - with venue partner**
\$150	Finance Forums - with no venue partner/sponsor
\$400	Half-day conference
\$650	One day conference

Menu of potential event sponsorship benefits/obligations

Two examples -

A. Lead sponsor Conference (including dinner) - Finsia-MCFS Banking and Finance Conference - \$15,000

- Acknowledged as lead sponsor of the conference and dinner (& pre dinner drinks)
- Opportunity to thank Executive conference dinner speaker
- Opportunity to thank conference delegates prior to Monday lunch

- Complimentary conference attendance (excluding dinner) for 2 staff and/or clients
- One complimentary table booking (of 10) plus two people on head table
- Acknowledged with logo in conference promotional material, flyers, website etc
- Opportunity to distribute one marketing brochure in conference satchels
- Sponsor banner displayed at the conference venue
- Opportunity to nominate or provide a plenary speaker (30-40 minutes) or
- Opportunity to develop & lead a mixed prac/academic pm session (90 mins)
- Receive list of attendees by name, title and company
- Access to event survey data

Note:

Tiered sponsorship is available for various conference elements.

For joint events with Finsia and other professional associations, where revenues are shared, there will be a contract from that association.

All other sponsorships over \$5,000 require a University of Melbourne legal contract.

B. Sponsor of academic seminar - \$3,000:

- Alliance with a credible and independent organization (MCFS)
- Association with credible research
- Acknowledgement with logo in event promotional material
- One dedicated event mailing to MCFS highlighting sponsorship
- Company name and logo to appear on the MCFS website (and to remain visible in event archive)
- Receive list of attendees by name, title and company
- Promotional slides recognising organisation sponsorship
- Opportunity to leave research-related promotional material on delegate chairs
- Sponsor's banner displayed at the event venue
- Opportunity to thank speaker(s)
- Opportunity to meet with speaker separately (subject to mutual availability)
- Access to event survey data

In return the sponsor agrees to provide its venue (if available with catering and audio-visual services) and agrees to promote the event throughout their networks to maximise exposure and raise awareness of the event over the weeks leading up to the event.

Potential sponsors and venue partners, and those seeking to harness academic research, are encouraged to contact:

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