

# 2009 COMMERCIAL SUPPORT PROGRAM

## Orthopaedic Trauma Association



### 25th Anniversary Meeting

Manchester Grand Hyatt Hotel

*Douglas Pavilion*

San Diego, California

### Show Dates

**Thursday, October 8 – Saturday, October 10, 2009**

*~Pre-meeting Courses begin Wednesday, October 7  
Annual Meeting follows October 8 thru 10~*

David C. Templeman, MD, President  
William M. Ricci, MD, Program Chair  
James A. Goulet, MD, Program Co-Chair  
Jeffrey M. Smith, MD, and  
CDR Michael T. Mazurek, MD Local Hosts

**For further information:**

Visit [www.ota.org](http://www.ota.org) or contact:  
Sharon Moore, Society Manager  
Orthopaedic Trauma Association  
6300 North River Road, Suite 727  
Rosemont, IL 60018  
Phone: 847-698-1631/Fax: 847-823-0536  
E-mail: [smoore@aaos.org](mailto:smoore@aaos.org)

# Commercial Exposition Information

## Schedule

### Move in & Set up:

Wednesday October 7: Noon - 5:00 PM

Thursday October 8: 8:00 AM - 2:00 PM

### Exhibit Hall Open:

Thursday, October 8: 3:00 PM – 5:00 PM

Friday, October 9: 9:30 AM - 5:00 PM

Saturday, October 10: 9:30 AM – 1:30 PM

### Move Out & Dismantle:

Saturday, October 10: 1:30 PM – 8:00 PM

- Lunch and beverage breaks will take place in the exhibit hall.
- 24-hour security in the exhibit area throughout the meeting
- **Remove ALL valuable equipment from booth areas at the end of each day.**

## Location

- Douglas Pavillion A-C of the Manchester Grand Hyatt Hotel
- General Session is up one level in the Elizabeth Ballroom.

## Decorator/Official Services Contractor

- BH&L Decorating (800) 995-4245 (www.bhldecorators.com)
- Material handling, drayage, furniture, extra draperies, labor and storage are available.
- Exhibitor kits will be provided online to all confirmed exhibit companies by July 1.
- **NOTE:** Hyatt Regency will refuse show materials shipped directly to the hotel.

## Booth Fees

- 10' x 10' Exhibit Booth ~ \$3,600.00 USD  
Two representative registrations included in booth fee.
- Additional Representative~\$690.00 USD
- Booth registration is on page 3.

**Booth space will be chosen on a first come, first served basis. Booth fees must be paid in FULL before exhibit booth space is confirmed. Cancel before September 1 for refund less \$500 fee.**

## Booth Construction

**Look!**

- Standard booth construction = **(one) 10' x 10'** exhibit booth, show color draperies 8' high in back and 3' high on the sides. For additional furnishings see the exhibitor kit.
- **Ceiling Height is 14 feet**, with 50% visibility so as not to obstruct the view of other booths.
- Island booths should have access in and out on all four sides.
- Hanging signs/banners may not exceed the perimeter or height of the assigned space. Attachment to exhibit hall beams is permitted through the rigging company Kleege. Forms are included in the exhibitor kit available July 1.

## Electrical Needs and Rigging

**Electricity** is solely handled by Edlen. Forms are included in the exhibitor kit available July 1.

**Rigging** is exclusively handled by Kleege. Forms are included in the exhibitor kit available July 1.

## Transportation Services

- UPS Freight is the transportation company used by BH&L Decorating. Contact BH&L Customer Service or call UPS Freight directly at 800-988-9889 to arrange your transportation needs.
- If you choose to contract with a transportation company other than UPS Freight, BH&L's ability to solve problems on-site is severely compromised.

## Sales Lead Capture Services

The OTA has contracted with TRAKKERS, LLC to provide sales lead capture systems to fulfill the exhibitor's needs. A current schedule of rental prices can be obtained by contacting TRAKKERS directly at: 406-556-4300

## Commercial Support Opportunities

A complete list of corporate branding opportunities can be found on page 6. All considerations will be based on first responder.

# 2009 Company Representative Registration Information

## Badge Fee

\$690.00 USD per person~ (add \$100 onsite) includes:

- Lunches and breaks
- Admission to the annual meeting general session (NO LABS)
- Welcome Reception (Thursday night)
- Final program booklet

*Representatives are invited to attend the pre-meeting Courses at an additional charge. See registration form on page 8.*

Confirmation will include an Exhibitor ID number and an exhibitor order number to allow web access to add and/or delete representatives until September 21.

Access codes will be given to the contact person indicated on the exhibit booth application.

**REPRESENTATIVE REGISTRATIONS MUST BE ENTERED ON-LINE.** Please visit the OTA website at [www.ota.org](http://www.ota.org) and click on the "Exhibitor Information" link.

**Payment is due in full on September 21.** For payment by check, please download a "Pay by Check" form from the Exhibitor Information link on the OTA website.

There is no limit to the number of reps entered or deleted online. However, the information must be completed and paid for by September 21. **After this date, all reps must register on-site and are subject to an additional \$100 late fee.**

## Badges

**There is absolutely no passing back of badges.** Each person entering the exhibit hall must have their own badge with their own name on it. False certification of individuals as Exhibitor reps, misuse of Exhibitor badges, or any method or device used to assist unauthorized persons to gain admission to the exhibit hall will be cause for permanent expulsion from the exhibition and removal of the exhibit from the exhibit hall at the sole cost and expense of the Exhibitor. Exhibits must be staffed by qualified individuals who are bona fide employees or representatives of the Exhibitor. An Exhibitor directly responsible for the conduct and appearance of the Exhibitor's employees or agents must be present in the exhibit space during all open hours.

## Rep Badge Only - No Booth

Companies interested in purchasing individual rep badges only (without a booth), will need to contact the OTA directly for an exhibitor ID number and code.

## Important Deadline Dates

- August 1 ~ Exhibitor Application Deadline to ensure publication in Final Program
- September 1~ Housing Deadline (see page five for hotel information)
- September 1 ~ Booth Cancellation Deadline
- September 21~ Individual Rep Registration Deadline. Rep registrations after this date will be handled on-site in San Diego. A late charge of \$100.00 will be added to the registration fee.

## Cancellation Fees

Exhibit Booth: \$500.00  
Must be in writing and received by September 1.  
**Absolutely no booth refunds after September 1.**

## Past Physician Attendance

2006	Phoenix, Arizona	1,050
2007	Boston, Massachusetts	1,166
2008	Denver, Colorado	1,207

## Housing Information

**New this year!**

**Hotel reservations must be made online thru ConferenceDirect at the exclusive Exhibitor link:**  
<https://resweb.passkey.com/go/OTA09EX>

★The Manchester Grand Hyatt Hotel  
2009 OTA Annual Meeting Rate:  
Single/Double = \$250+ tax





**25th Annual Meeting Exhibit Dates**  
**October 8-10, 2009**  
 Manchester Grand Hyatt Hotel/Douglas Pavilion  
 San Diego, CA

## Exhibitor Booth Application

Fax or Mail along with page 4 to:

6300 N. River Road, Suite 727  
 Rosemont, IL 60018  
 Phone: (847) 698-1631/Fax: (847) 823-0536  
[ota@aaos.org](mailto:ota@aaos.org)/[www.ota.org](http://www.ota.org)

### Booth Set-up

Wednesday, October 7th: 12 Noon – 5:00 PM  
 Thursday, October 8th: 8:00 AM – 2:00 PM

### Exhibit Dates and Times

Thursday, October 8th: 3:00 PM to 5:00 PM  
 Friday, October 9th: 9:30 AM to 5:00 PM  
 Saturday, October 10th: 9:30 AM to 1:30 PM

*Please see the preliminary program for scheduled break times: [www.ota.org](http://www.ota.org)*

### Booth Dismantle

Saturday, October 10th~ after 1:30 PM

### Booth Fees

2009 Exhibit Booth Fee is \$3,600. This fee includes:

- (one) 10' X 10' booth
- (one) 7"x44" one-line ID sign
- Two rep registrations
- One final program per rep
- One final attendee list~post meeting
- Two tickets to any one of the pre-meeting courses

### Registration

All representatives of exhibiting companies must register and wear the official exhibitor's badge for admission to and while in the exhibit hall. Two rep registrations are included with each reserved space. Additional representatives may register at \$690 per person until September 21. Any show registrations after this date must register on-site at \$790. One-day passes are not available.

### Security

Exhibitors must make provisions for the safeguarding of goods, material, equipment and displays at all times. Security will be provided for the exhibit area, but the OTA, the hotel, and the service contractors do not guarantee or protect exhibitors against loss or damage of any kind incurred.

### Freight & Drayage

BH&L Decorators, Inc. is the official show manager. **Customer service phone #800-995-4245.** Exhibitor kits will be available online by July 1.

### Assignment of Space/Location

- Exhibit space will be chosen on a first come/first serve basis.
- Receipt of full payment is necessary to reserve space.
- A floor plan will be forwarded upon receipt of payment for booth selection.
- Exhibit booths will be located in Douglas Pavillion.
- Companies are limited to 1 space, unless otherwise arranged.

### Cancellation Fee

Booth Cancellations must be received in writing by September 1, 2009 and are subject to a \$500 cancellation fee. **After September 1, no refunds will be given.**

**Name of Company:** \_\_\_\_\_

(To be listed in Final Program exactly as shown)

**Address:** \_\_\_\_\_

\_\_\_\_\_

City	State	Zip Code
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**Company Contact Person:** \_\_\_\_\_ **Title** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_ **Fax Number:** \_\_\_\_\_

**e-mail address:** \_\_\_\_\_

**# Booths Requested** \_\_\_\_\_ **Total \$:** \_\_\_\_\_

### Method of Payment:

Check# \_\_\_\_\_ (US funds only)       MasterCard    Visa    AMEX

**Card Number:** \_\_\_\_\_ **Expiration Date:** \_\_\_\_\_

**Cardholder Signature:** \_\_\_\_\_

\*\*\*

**PAGE 4 MUST BE INITIALED AND ATTACHED WITH THIS ORDER FORM.**

**2009 Commercial Exposition Contract – Terms and Conditions**  
(initial and return with booth application form-page 3)

The booth fee is for one 10' X 10' space. All assignments will be made on a first come, first served basis determined by the date booth fees are paid in full.

**BADGES**

Passing back badges is strictly prohibited. Each person who enters the exhibit hall must have their own badge with their own name on it. Any person found in violation will be asked to leave the exhibit hall and will risk future exhibiting eligibility.

**ELIGIBILITY**

OTA determines eligibility of any company and its products for exhibit. The OTA may forbid the installation or request removal of any exhibit or promotion, at its discretion, at any time, that is not keeping with the OTA's character or purpose. **See vendor policy (attached) for more details.**

**GIVE-AWAYS**

**Give-Aways:** Companies wishing to have "give-away" novelty gifts, which are **practice-related** in nature, may do so with **prior** approval of the OTA. Distribution of promotional gummed stickers or labels is prohibited. Promotional material is not allowed in lobby areas. Prize contests, drawings, raffles, or lotteries of any description, held at any time or place within the auspices of the OTA meeting are expressly prohibited. The OTA may forbid or request removal of any "give-away" at its discretion and at any time. **See Vendor Policy.**

**DECORATOR**

**General Contractor:** Exhibitors must contract for janitorial and drayage services through the OTA's official service contractor, BH&L Decorators, Inc. Please contact BH&L's Exhibitor Services Department:

**BH& L Decorators, Inc.**  
**7601 Chancellor Drive**  
**Orlando, Florida 32809-6920**  
**Phone: 407-851-9080/800-995-4245 Fax: 407-851-3090 Web: www.bhldecorators.com**

**Guidelines:** Only professionally printed signs will be allowed for display. One 7" x 44" identification sign will be provided by BH&L. Additional signage may be ordered by contacting BH&L. Rates vary based on number of days out. Exhibitors or agents acting in their stead may not attach any item to any stationary wall, floor, window, or ceiling with screws, nails, staples, tape or any other substance. No item may be posted, nailed, screwed, or otherwise attached to columns, floors, furniture, or other areas of the hotel. Order **rigging** through Kleedge-forms can be found in the exhibitor's kit available July 1.

**FDA COMPLIANCE**

**All products which are not FDA approved for a particular use in humans or which are not commercially available in the U.S. will be permitted to be exhibited only when accompanied by the appropriate signs that indicate the device's FDA clearance status. The following are signs that should be displayed:**

- **This Device is not cleared by the FDA for distribution in the United States.**
- **This Device is a Class III device which is limited by federal law for investigational use only.**
- **This Device is a Class II device which is cleared for marketing for \_\_\_\_\_ use only.**

**The signs must be easily visible and placed near the devices themselves and on any graphics depicting the device. The exhibitors shall have available at the display a letter from the FDA which describes the allowable use status of the product or products. Exhibitors are cautioned about the FDA's prohibition on promoting "cleared for marketing devices" for unapproved uses. Requests for information and guidance should be directed to: FDA Division of Small Manufacturer's Assistance at [www.fda.gov](http://www.fda.gov).**

**LIABILITY**

Exhibitor shall be fully responsible to pay for any and all damages to property owned by Manchester Grand Hyatt San Diego, its owners or managers, which results from any act or omission of Exhibitor. Exhibitor agrees to defend, indemnify and hold harmless, Manchester Grand Hyatt San Diego, its owners, managers, officers or directors, agents, employees, subsidiaries and affiliates, from any damages or charges resulting from Exhibitor's use of the property. Exhibitor's liability shall include all losses, costs, damages, or expenses arising from or out of or by reason of any accident or bodily injury or other occurrences to any person or persons, including the Exhibitor, its agents, employees, and business invitees which arise from or out of the Exhibitor's occupancy and use of the exhibition premises, the Hotel or any part thereof.

**Company \_\_\_\_\_ initials: \_\_\_\_\_**

## OTA 2009 Corporate Branding/Commercial Support Opportunities

~return this page with payment page 7~

### I. Networking Functions

#### Annual Meeting Welcome Reception

This year's reception will take place on Thursday evening on the Manchester Grand Hyatt's 25,000-square-foot pool deck with bay-view sundeck. OTA invites its corporate supporters to join the OTA in welcoming all 2009 meeting attendees. Choose a space of the reception area to meet and greet attendees. Using your budget, work directly with the hotel to host your choice of food and beverages (no charge for floor space). Your area of the floor will be identified with signage provided by OTA.

#### Sign thanking company for support will be displayed at functions below:

Resident Course Lunches  \$1,000 or  \$5,000 Exclusive Sponsor

Resident Fellowship Fair Luncheon  \$1,000 or  \$5,000 Exclusive Sponsor

Women in Orthopaedic Trauma Luncheon  \$1,000 or  \$5,000 Exclusive Sponsor

Young Practitioners ½ day Meeting  \$1,000 or  \$5,000 Exclusive Sponsor

Refreshment/Lunch Break in Exhibit Hall  \$5,000ea

OTA 25<sup>th</sup> Anniversary Member Celebration:

Donor Level I- \$10,000 includes: Sign displayed at celebration venue

Donor Level II-\$15,000 includes: Sign displayed at celebration venue, Ad on scrolling slide show on hotel registration site

**Resident Education:** educational scholarships (given to residents interviewing for trauma fellowship at the meeting) to attend either the Annual Meeting or the Residents Comprehensive Fracture Course at a discounted rate: **\$10,000**

*Company logo will appear on all resident interview room signage*

### II. Corporate Branding

*All items must be pre-approved by OTA.*

**Conference Bag \$15,000**

**Box Lunch Branded Tote Bag \$8,000**

**Hotel Dark Channel \$1,700 per day**

The hotel has the availability of dark channels for the use of advertisement, promotions and conference information to be displayed in guest room TV's.

**Hotel Guest Room Key Cards \$8,000**

**Logo Door Hanger \$6,000 + production charges**

**Speaker Ready Room \$2,000**

Screen saver logo and sign in room

**Pre-Meeting attendee list \$1,000 (one time usage)**

Additional items on following page....

**OTA 2009 Corporate Branding/Commercial Support Opportunities (continued)**  
~return this page with payment page 7~

- Room Drop**  
Inside room delivery: **\$7,000**  
Deliveries placed outside guest room: **\$5,000**  
*The hotel does not have the ability to accommodate under-door deliveries.*
- Gobo Lighting** **\$2,000 per day, per location**  
Gobo lighting consists of a glass or metal cut out placed inside a lighting fixture that has a design or graphic, such as a company logo, which can then be projected on a wall or designated area. They are a great tool used for showing off your company logo, rather than banners or signage.
- Banners/Signage/Pillar Wrap (In Hotel)** **\$5,000**  
All banners and signs must be professionally printed or computer generated.  
Signs are only permitted in the foyers of the exhibit hall and general session room.  
Groups or outside vendors are not allowed to hang their own banners rigging must be pre-arranged through the hotel at additional cost.
- One page ad in Program-at-a-Glance Brochure** **\$3,000ea.**  
**Front or back cover (inside and out): \$6,000ea.**
- Meeting Bag Insert** **\$2,000/ea.**  
8" x 11.5" single page advertisement in conference bag
- Exhibit Hall Aisle Signs** with company and booth location **\$2,000**
- Wireless Access** **\$7,000**  
Your company logo will appear on meeting attendees' computer screen upon login. Access will be granted in the exhibit hall throughout the entire meeting.
- Print Station for meeting handouts** **\$5,000**  
Your logo will appear on a desk top monitor screen saver.  
In an effort to be green, OTA will post all handouts online, allowing attendees to print only those pages desired at this onsite print station.
- Advertisement on hotel reservation website: option #1** **\$8,000**  
Company logo will appear on banner header upon login to site.  
Company logo will appear on confirmation sheet print out.
- Advertisement on hotel reservation website: option #2** **\$5,000**  
Company logo will appear on slide show on homepage of hotel reservation site.
- other:** \_\_\_\_\_



Orthopaedic Trauma Association  
2009 Annual Meeting  
October 7-10  
Manchester Grand Hyatt Hotel ~ San Diego, California

**Corporate Branding/Commercial Support Payment**

Name of Company: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

City

State

Zip Code

Contact Name and Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Total Amount : \$ \_\_\_\_\_

Check # \_\_\_\_\_ (*US funds only*)     MasterCard     Visa     AMEX

Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Card Holder Signature: \_\_\_\_\_

**REMIT TO:**  
OTA  
6300 North River Road, Suite 727  
Rosemont, IL 60018  
Phone: 847-698-1631 / Fax: 847-823-0536  
E-mail: [smoore@aaos.org](mailto:smoore@aaos.org) / [www.ota.org](http://www.ota.org)



**2009 Pre-meeting Course Industry Rep Registration**  
Manchester Grand Hyatt Hotel ~ San Diego, California

Visit [www.ota.org](http://www.ota.org) for a full description of each event.

**Wednesday, October 7**

- International Orthopaedic Trauma Care Forum...\$100**
- Basic Science Focus Forum.....\$200**  
Full day October 7<sup>th</sup>, ½ day October 8<sup>th</sup>

Name: \_\_\_\_\_

Address (event ticket will be mailed here):  
\_\_\_\_\_  
\_\_\_\_\_

Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

**Total Amount Enclosed:**

Check # \_\_\_\_\_ (*US funds only*)     MasterCard     Visa     AMEX

Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Card Holder Signature: \_\_\_\_\_

*Pre-registration deadline: September 9, 2009*

**REMIT TO:**

OTA  
6300 North River Road, Suite 727  
Rosemont, IL 60018  
Phone: 847-698-1631/Fax: 847-823-0536  
E-mail: [smoore@aaos.org](mailto:smoore@aaos.org) / [www.ota.org](http://www.ota.org)



## **Orthopaedic Trauma Association Policy on Fund Raising, Contributions, & Relationships with Industry**

The Orthopaedic Trauma Association is an educational and scientific organization devoted to the development and dissemination of knowledge about musculoskeletal injuries and related disorders. It is tax exempt under section 501 C3 of the US Internal Revenue Code.

As the pre-eminent scientific and educational organization devoted to musculoskeletal trauma in North America, the OTA recognizes its obligation to promote financial support for scientific research in this field. This mission is urgent considering the lack of financial support for this, and indeed all types of trauma research, relative to the heavy burden of injury to our society.

We believe that research is the path to more cost effective care for injured patients, and to more effective prevention of injuries, which are the most significant health problem of Americans under age 45.

The Orthopaedic Trauma Association's success in becoming the major scientific forum for musculoskeletal trauma in North America is significantly due to crucial support, from a number of orthopaedic equipment suppliers and manufacturers, who helped us with financial aid and technical support for meetings and organizational costs, as well as by providing research funds which we have distributed through a peer-review process. During its establishment, the OTA has retained the respect of the orthopaedic community, and of industry, by remaining independent, in appearance and fact, from the manufacturers while also attempting to deal equitably with each of them.

We believe that it is essential to our credibility as a scientific orthopaedic organization that the actions of the OTA be free from both real and apparent influence of individuals or business organizations that stand to gain financially from recognition in OTA sponsored activities. Practical laboratory "motor skills" exercises are an invaluable part of our efforts to educate orthopaedic surgeons about the treatment of injuries. However, they are essentially impossible without the support of instrument and implant manufacturers. Thus we are committed to equitably distributing invitations to participate to all manufacturers of equipment which is appropriate to the instructional goals of a given exercise. However, to maintain didactic effectiveness, only a single manufacturer will generally be invited to participate in that exercise. (Opportunities will routinely be made available for other manufacturers who wish to display related equipment at the same meeting.)

The Orthopaedic Trauma Association wishes to recognize and encourage continuing contributions for research, teaching and other appropriate activities, from manufacturers of supplies and equipment related to the treatment, prevention and study of musculoskeletal trauma. We believe that our organization stands in a unique position in its ability to direct contributed funds to relevant research, specifically focusing on musculoskeletal injuries rather than other aspects of orthopaedics. This focus may represent an attractive opportunity for companies and individuals who wish to contribute specifically to musculoskeletal traumatology in recognition of personal or business connections with this field.

The OTA therefore established the following policies as guidelines for its efforts to obtain adequate financial support for musculoskeletal trauma research.

Costs of operating the association necessitate an aggressive approach to generating revenue to support association operations. Any revenue generating activities should not compromise the ability of the association to generate funds to support research grants which have traditionally been supported through corporate sponsorship. The following recommendations are intended to help generate corporate revenue to offset the association's operating costs while recognizing those corporations that have generously supported the research committee's endeavors in the past and to preserve the ability of the association to raise funds to support research grants in the future.

1. An annual appeal for research funds will be directed to representatives of related industries, focusing specifically, but not exclusively, on those who have been exhibitors and participants at our meetings.
2. Levels of support have been identified with concomitant benefits to the donor.

3. Specific conditions may be attached to the funds granted to OTA for research purposes, subject to the approval of the OTA Board of Directors. Such conditions must not conflict with our organizational policy of equitable dealings with each manufacturer and donor.
4. In all cases, the recipients of such research grants will be determined, according to its usual practice by the Research Committee of the OTA, with approval of the Board. Selection of grant recipients will be done without influence or participation by the donor. Use of funds will be subject to OTA policies regarding accountability, reporting, etc.
5. Publications and presentations will be expected to acknowledge support from the OTA, and in the cases of specifically named research grants as these may be co-named by the donor conditionally.
6. Contributors to the OTA's Trauma Research Fund will be recognized by a listing in the annual OTA meeting program, and on appropriate posters displayed at our annual meeting, our specialty day meeting during the AAOS Annual Meeting, and at any OTA sponsored educational courses. Special recognition will be accorded to donors of named research grants, by displaying these grants prominently after the donor's name. Formal presentation of any such awards will be made during our annual meeting. All such recognition must comply with ACCME regulations.
7. At this time, the OTA desires to limit donations to supporting peer-reviewed grants in support of research activities. (Presently, we choose not to support awards for past research, or competitions for papers on research topics, etc.)
8. Unrestricted educational grants will be considered in calculating the donor's Level of Giving.
9. Directed Donations to the Research Fund will be allowed, under the following guidelines (See Appendix A).
10. It is unethical for company representatives to attend programs developed by other companies (ie, Labs, Symposiums). Company representatives are welcome to attend educational events held in the General Session room at the Annual Meeting.
11. Companies that sponsor labs at OTA events, should be limited to 1 representative per 2 tables, unless otherwise agreed upon with OTA office staff.
12. The Chief Financial Officer of the OTA will
  - Review and formulate the Exhibitor Prospectus
  - Evaluate policy related questions about issues of corporate sponsorship at OTA events
  - Determine which portions of the annual meeting or other educational offerings are appropriate for corporate sponsorship
  - Determine how to best recognize that corporate sponsorship
13. Sponsorship of individual events at the annual meeting by interested parties is permissible if the following conditions have been met:
  - Preference to Diamond, Platinum or Gold level donor from the previous year
  - Program committee has determined that the event is appropriate for corporate sponsorship
  - Event does not take place during the OTA Pre-Meeting or Annual Meeting hours.
  - Date and time of event to be set by OTA Staff/Program Committee.
  - OTA staff to determine room assignments on specified date and time.
14. Hands on Demonstration sessions by interested parties may be scheduled at the same facility as an OTA annual meeting if the following conditions have been met
  - Preference to Diamond, Platinum or Gold level donor from the previous year
  - Program committee has determined that the event is appropriate for corporate sponsorship
  - Date and time of event to be set by OTA Staff/Program Committee.
  - OTA staff to determine room assignments on specified date and time.
  - The cost of sponsoring an event will be set by the CFO in consultation with the Chair of the Program Committee.
  - Sessions must be clearly labeled as corporate events and not as OTA sponsored demonstrations to limit the possibility that the OTA might be perceived as sanctioning the particular item being demonstrated.
  - Event does not take place during OTA Annual Meeting hours
  - Opportunities to sponsor such events may be limited to current exhibitors/contributors to research or to those providing unrestricted educational grants.

15. The sale of each 8x10 booth space at annual Meeting will include two vendor registrations to the meeting. Additional registrations will be sold at standard registration rates. There is no limit to the number of industry representatives who may attend the annual meeting.

16. OTA prohibits hands-on demonstrations in exhibit booths.

17. OTA prohibits amplification in exhibit booths.

18. OTA will provide food and beverage in the exhibit hall.

**New**

### **Industry Support Commitment Policy**

The OTA Fund Development Committee recognizes that circumstances may arise which would prevent an OTA corporate donor from maintaining a donor level that they have historically maintained with the OTA. The Committee may grant a 1-year grace period during which the company will continue to be recognized at the previous year's donor level. In this circumstance, the company must pledge a research/education grant in writing for the following year by April 1 in order to receive booth and lab benefits for the current year. All corporate donors at the platinum level or higher will have the opportunity to support one OTA annual meeting lab per year. The OTA reserves the right to modify this policy at any time without notice.

*Original Document November, 1993 Revised June 2009*

### **Appendix A**

### **OTA Directed Donation to the Research Fund Policy**

*Approved October 2005*

Whereas a number of medical research funding entities have successfully allowed directed research donation to accommodate and reflect the research interests of both individual and industry benefactors, I hereby propose that the OTA allow "directed donation" to the research fund under the following guidelines:

- I. The proposed scope and topic of the "directed donation" is reviewed by the OTA research committee and felt to:
  - a. Represent a topic which is both relevant and of importance to the OTA membership.
  - b. Be broad enough in scope to allow a competitive solicitation of multiple proposals.
  - c. Not be specifically directed to an individual or institution.
- II. The "directed donation" would require a matched non-directed donation in a 1:1 ratio to the general research fund. For example a \$25,000 "directed donation" for research in a given area must be accompanied by a matching \$25,000 donation to the general research fund. These general funds would not necessarily be used for research within the scope of the "directed donation"
- III. In the case of a prior donor, the non-directed donation would be expected to equal or exceed the prior year's contribution, resulting in an overall increase in giving, rather than a shift from non-directed to directed giving.
- IV. If approved by the research committee, each "directed donation" would result in a request for proposals within the scope of the "directed donation". This RFP would be advertised to the OTA membership. Proposals would then be evaluated by the research committee and funding awarded to proposals meeting the research standard of the OTA research committee within the scope of the directed donation.
- V. In the event that the directed donation is not used for research within the scope of the directed donation within three years of initial contribution, the directed funds would be returned to the donor. Matching monies allocated to the general research fund would not be returned.
- VI. Other than the direction of the area of research to be studied, the grant will be considered as a donation to the OTA research fund. The donor of directed donation funds would not enjoy editorial control of the venue, content, presentation, or publication of any scientific information produced by this research.

##