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## Chapters and Risk Management

### 1. Organization

#### 1.1 What does it mean legally to be a CoreNet Global Chapter?

CoreNet Global, Inc is classified by the Internal Revenue Service as a 501(c)(6) not-for-profit professional association and is incorporated in Washington, D.C. The U.S. Chapters are unincorporated affiliates of CoreNet Global, Inc. They have no separate legal standing, a fact which has legal, risk management and IRS implications for CoreNet Global, Inc.

CoreNet Global's directors, officers and managers have a responsibility to preserve and protect the intellectual property and assets of CoreNet's worldwide membership. This responsibility includes the development of policies and guidelines that cover legal, financial, and procurement practices as well as the use of CoreNet Global's branding and intellectual property rights.

Chapters are encouraged to consult and coordinate with CoreNet Global staff in developing their activities and programs. CoreNet Global should be considered a partner and a resource which is deeply invested in the inception, development, and execution of Chapter events.

#### 1.2 Can Chapters use CoreNet Global's name, logo and materials?

CoreNet Global's name and logo are trademarked and its written materials (e.g., educational materials, on-line articles, documents and samples, etc.) are copyrighted. Chapters may request

permission to use CoreNet Global's name and logo along with other trademarks and copyrighted works. Chapters interested in using CoreNet Global's intellectual property should contact CoreNet Global staff for information about obtaining permission. Here is the policy regarding the CoreNet Global trademark:

#### 1.3 CoreNet Global Trademark Policy:

It is understood by the Chapter that the name "CoreNet Global," the CoreNet Global logo, and other CoreNet Global service marks (collectively referred to as "marks"), are the sole and exclusive property of CoreNet Global. CoreNet Global hereby grants the Chapter a non-exclusive, non-transferable license to use the CoreNet Global name in the name of the Chapter.

In addition, CoreNet Global grants the Chapter a non-exclusive, non-transferable license to use the other marks identified, pursuant to the conditions listed below. These licenses may be revoked by CoreNet Global at any time.

The Chapter may use the marks in conjunction with its regular and customary association-related activities and in the ordinary course of its operations. CoreNet Global reserves the right to review and approve all uses of its marks. The Chapter acknowledges CoreNet Global's exclusive right, title, and interest in and to the marks and will not at any time do or cause any act or thing contesting or in any way impairing or

tending to impair any part of such right, title and interest. The Chapter shall not in any manner represent that it has any ownership in the marks or the registrations thereof, and the Chapter acknowledges that use of the marks shall not create any right, title or interest in Chapter.

In addition to CoreNet Global's marks, the Chapter recognizes that other Organizations may have rights in trademarks/ service marks and that the Chapter will avoid using any known registered, or proprietary, mark (without appropriate permission). Specifically, and by way of example, the Chapter may not make reference to the registered mark "CRE" exclusively. Chapter may use the acronym "CRE" only if its use is preceded by the full phrase, "corporate real estate".

If the Chapter has any questions regarding the use of a word mark/logo mark, or any identifier that could be considered proprietary, its representative should contact CoreNet Global headquarters staff.

## 2. Risk Management--Insurance

### 2.1. What exposures exist?

#### 2.1.1 Legal Liability

As suggested above, even well-intentioned acts may result in legal liability, i.e., financial exposure, to a party. In light of the relationship between CoreNet Global and its Chapters, there is the potential for a third party to seek recovery from CoreNet Global for the actions of a Chapter. Chapters should work

together with CoreNet Global on all programs, events and activities to prevent this liability.

CoreNet Global purchases and maintains various insurance policies as part of its overall risk management practices, including general liability, property insurance and directors and officers' insurance. If you are holding an event and the venue requires a certificate of insurance coverage, please provide your Chapter Manager with the following information in order to complete the requested certificate:

- Copy of the venue contract
- Name and description of the event
- Contact name of the onsite event manager
- Fax and phone number of the onsite event manager
- Complete address of where the event/meeting is to take place

#### 2.1.2 Event Location Liability

When selecting an event local it is important that the nature and atmosphere aligns itself with the standards and quality of the Association and offers an atmosphere appropriate and welcoming for all members and guests. Chapters should have the safety of its members in mind when selecting venues.

\*\* Before a Chapter officer signs a contract, it is important to make sure that CoreNet Global complies with or can comply with any risk management or insurance requirements. Any and all contracts

which are to be signed for any CoreNet Global Chapter event must be reviewed and approved by headquarters staff. All contracts should be submitted for review at least six weeks prior to event.

### **2.1.3 Reputation as an Asset--**

#### **Reputation and Good Will**

CoreNet Global's brand and its reputation constitute the association's most valuable asset and must be protected. Chapters must coordinate with CoreNet Global on all programs, events and activities to ensure they meet or exceed the expectations of CoreNet Global's standards of excellence.