# TABLE OF CONTENTS

## I. Annual Meeting

1. Sessions ........................................................................................................................................... 4  
2. Industry Symposia .......................................................................................................................... 4  
3. Satellites and Member Society Symposia ......................................................................................... 4  
4. Industry Tutorials ............................................................................................................................ 4  
5. CME ................................................................................................................................................ 5  
6. Abstracts .......................................................................................................................................... 5  
7. Posters ............................................................................................................................................. 10  
8. Exhibitors ........................................................................................................................................ 11  
9. Registration ..................................................................................................................................... 11  
10. Payment ......................................................................................................................................... 12  
11. Travel Awards ............................................................................................................................... 12  
12. Reimbursement .............................................................................................................................. 12  
13. Travel ............................................................................................................................................ 12  
14. Hotel Accommodations .................................................................................................................. 13  
15. General .......................................................................................................................................... 13  
16. Annual Meeting Timeline ............................................................................................................... 13  

## II. Educational Courses (FOCISed)

1. The Advanced Course in Basic & Clinical Immunology ................................................................. 13  
2. Basic Immunology in Medicine Update .......................................................................................... 16  
3. Interventional Immunology ............................................................................................................ 16  

## III. Development

1. Overview .......................................................................................................................................... 18  
2. Fundraising processes ..................................................................................................................... 18  

## IV. Finances and Budgeting

1. General ............................................................................................................................................ 19  
2. Check Signing & Bill Processing ...................................................................................................... 20  
3. Accounts Receivable ....................................................................................................................... 20  
4. Accounts Payable ............................................................................................................................ 21  
5. Procedure for Treasurer’s Packet .................................................................................................... 21  
6. Reimbursements .............................................................................................................................. 21  
7. Refund Procedures ........................................................................................................................... 21  

## III. FOCIS Centers of Excellence

1. FCE Directors Meeting .................................................................................................................... 21  
2. Governance ...................................................................................................................................... 23  
3. Accreditation .................................................................................................................................. 23  
4. Development ................................................................................................................................... 23  
5. Designation ..................................................................................................................................... 23  
6. Participation ..................................................................................................................................... 23  
7. Programming ................................................................................................................................... 23  

## IV. Steering Committee

1. Rotation Schedule .............................................................................................................................. 24  

## V. Committees

1. Education .......................................................................................................................................... 24  
2. Industry Liaison Committee (ILC) .................................................................................................... 24
VI. Organizational Operations ......................................................................................................... 24
  1. FOCIS Record Retention Schedule ......................................................................................... 24
  2. Project Management Guidelines ............................................................................................... 25
  3. Email Communication Guidelines ............................................................................................. 26
  4. Work Requests ........................................................................................................................... 26
  5. Travel Vouchers ......................................................................................................................... 26
  6. Written Correspondence, Promotional Materials ..................................................................... 26
  7. Proposals ................................................................................................................................ 26
  8. Contracts .................................................................................................................................. 26
  9. FOCIS Mailing List .................................................................................................................... 26
  9. YM Database Backup ................................................................................................................ 26
  10. Website Backup ....................................................................................................................... 26

VI. FOCIS Style-Guide .................................................................................................................... 27
  1. Set-Up ..................................................................................................................................... 27
  2. Computer Presentation Guidelines .............................................................................................. 27
  3. Technical Requirements for PowerPoint Presentations ........................................................... 27

VII. Crisis Management .................................................................................................................. 28

SC=Steering Committee, EC=Executive Committee, BOD=Board of Directors
I. ANNUAL MEETING

1. Sessions
The FOCIS Annual Meeting scientific program is made up of plenary sessions, concurrent thematic symposia, industry symposia, oral abstract sessions, poster sessions, industry tutorials and member society symposia.

These sessions are determined by the Annual Meeting Organizing Committee. The chair of the committee is determined by the FOCIS Executive Committee and has a two-year appointment. The chair then selects 4-6 additional members to support him/her.

The Organizing Committee meets at least one year prior to the Annual Meeting to develop a preliminary grid of sessions and speakers. Once finalized, the Meetings Manager sends invitations to the invited speakers and tracks their acceptance/rejection and completion of title submission, disclosure, pre-/post- test questions, and registration and hotel reservations.

2. Industry Symposia
Industry symposia are programmed by the FOCIS Organizing Committee, with input from the FOCIS Executive Committee, when necessary. Industry partners are invited to support these sessions, whose topics generally tie into one of the company’s interests. However, the supporting industry partner may not be involved in the programming of the session.

3. Satellites and Member Society Symposia
Symposia are developed and presented by the FOCIS Member Societies on the first formal day of the FOCIS Annual Meeting. Because these programs are the work of individual Member Societies, they tend to be disease-specific rather than cross-disciplinary. FOCIS does not offer CME credits for these sessions but the organizing Member Society may do so independently.

See full specifications for Member Society Symposia in Appendix A

- Space is limited and will be allotted on a first come, first serve basis.
- Meeting space, basic AV and one coffee break are offered at no charge, however any additional expenses (additional catering, additional AV, set-up, technicians, etc.) will be passed on to the respective Member Society at cost.
- FOCIS will handle registration processing and order catering & audio-visual equipment.
- All AV and catering orders must go through FOCIS and FOCIS-preferred vendors.
- All catering should be served inside the session room whenever possible.
- Member Societies have sole discretion over the content of their symposia, but must provide FOCIS with a preliminary agenda eight months prior to the Annual Meeting and a final agenda/program for publication in the FOCIS Final Program approximately three months prior to the meeting.
- Support for any satellite session must be indicated on the Satellite Application Form and must be approved in advance by the FOCIS Executive Committee. Support revenue is subject to the FOCIS revenue-sharing policy. FOCIS will not provide financial support to satellite meetings.
- FOCIS will provide “advertisement” on the FOCIS Annual Meeting web site, with links to the society’s meeting’s web page (if available) and agenda. FOCIS will post to its website the following information at the time it is received from the Member Society: Name of group; chairs; objectives/agenda of satellite; location; dates; times (if available).
- Member Society Symposia speakers are required to register to attend the Annual Meeting. Speakers may be eligible to receive a 50% reimbursement of annual meeting registration, if the speaker completes the annual meeting post-evaluation.

4. Industry Tutorials
Industry Tutorials are programs developed and presented by FOCIS Industry Partners. They are financially supported by the Industry Partner and content is solely the responsibility of the Industry Partner. They are held in slots that do not oppose the scientific program (early morning or over the lunch hour) FOCIS does not participate in the programming or planning of these sessions and simply manages logistics. CME credits are not offered for these sessions.

- All AV and catering orders must go through FOCIS and FOCIS-preferred vendors.
- All catering must be served inside the session room whenever possible.
- All catering ordered by industry partners is charged back at cost.
▪ Any company equipment brought into the assigned room location(s) is the sole responsibility of the company and must be pre-approved by FOCIS.
▪ The rooms may not be used as hospitality suites.

See full specifications for Industry Tutorials in Appendix A

5. CME

The board of directors agreed to discontinue offering CME credits for all current and future FOCISed courses. (BOD: 6/23/16)

The following verbiage is used to acknowledge industry support of scientific sessions: “This session is programmed by FOCIS and supported by __________.”

Disclosure
Anyone in a position to influence the content of the programming at the Biennial Congress must submit a completed disclosure form disclosing any financial relationships related to the industry. This includes the BOD, FCE Directors, Member Society representatives, abstract reviewers, abstract presenters, etc.

Each abstract author MUST submit a completed disclosure form. If all authors have not completed a disclosure form prior to the submission deadline, the abstract will automatically be withdrawn from consideration. This policy has been established in cooperation the ACCME guidelines.

6. Abstracts

One-year prior to meeting, send RFP for abstract vendors. See current RFP for requirements (S:\ANNUAL MEETING General\Event Management Technology). FOCIS will bid out and compare a minimum of three vendors, negotiate and select a vendor partner to help develop a submission site.

The FOCIS Abstract Committee Chair is a member of the Organizing Committee, with a one-year term. The Co-chair is invited by the Organizing Committee Chair and Abstract Committee Chair. The Co-chair will serve for one year, then succeeds to Chair to following year, to maintain consistency. Both the Chair and Co-Chair are required to be online reviewers, and to attend the in-person review meeting. The Abstract Committee Chair is recognized as a member of the Organizing Committee. The Chair and Co-chair will be selected prior to online abstract submission opening.

Eight months prior to the meeting, online abstract submission will open. FOCIS members of any of the FOCIS Member Societies or FOCIS Centers of Excellence, as well as non-members are eligible to submit abstracts. There is a $30 non-refundable submission fee per abstract for non-member Presenting Authors. This fee is waived for Presenting Authors who are FOCIS members. If an abstract is submitted prior to joining FOCIS, the abstract fee cannot be refunded. Only Presenting Author can submit an abstract.

The Organizing Committee has the sole discretion regarding placement of abstracts within the FOCIS program. Abstracts will be considered for either an oral or poster presentation. Abstracts will be peer-reviewed per the categories provided. Authors must choose one subject area and one FOCIS pillar for each abstract submitted during online submission.

Abstract review will initially be completed online by the Organizing Committee, 2-3 representatives appointed from each Member Society, the FOCIS Steering Committee, appointees from past organizing and review committees, the FOCIS Board of Directors, FCE Directors and any other invited candidates. Online review should occur approximately five months prior to the meeting. Invitations for reviewers should be sent two months prior to online reviewing.

Each abstract is blindly reviewed by at least three reviewers and given a score between 1 and 5, with 1 being the highest score (scale below). Reviewers are not allowed to review abstracts from their lab or institution and should opt out of these reviews. Reviewers will also indicate if an abstract is newsworthy.
Grading Scale
1- Outstanding: Consider for presentation in a Plenary Session or Thematic Symposium
2- Excellent: Consider for presentation in an Oral Abstract Session
3- Good: Solid science, not worthy of an oral presentation, but would make a great poster
4- Fair: Poster presentation only
5- Not Acceptable

Following the online review, the abstracts scores are averaged and broken down into several reports to be reviewed and initially sessioned by the Abstract Committee Chair(s). These are emailed four months prior to meeting. Reports include:

1. PDF of all abstracts sorted by score and including the following queries: Control ID, Category, Pillar, Average Score, Scores (All), Presentation type, Human/or Mouse, Previous publication, Authors/Institutions, Title, Abstract Body

2. Excel Spreadsheet of Abstracts sorted by Average Score:

<table>
<thead>
<tr>
<th>Control ID</th>
<th>Average Score</th>
<th>Presentation Type Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>120102</td>
<td>1.33</td>
<td></td>
</tr>
</tbody>
</table>

3. Excel Spreadsheet of Abstracts by Average Score -> Category -> Presentation type preferred:

<table>
<thead>
<tr>
<th>Control ID</th>
<th>Average Score</th>
<th>Presentation Type Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>106702</td>
<td>1.33</td>
<td></td>
</tr>
<tr>
<td>103629</td>
<td>1.67</td>
<td></td>
</tr>
</tbody>
</table>

An in-person meeting is then scheduled approximately 16-20 weeks prior to the meeting to finalize abstract sessioning into thematic and oral abstract sessions, and select newsworthy abstract for the scientific and lay public communities. The meeting is typically held at the abstract committee chair’s institution, the Annual Meeting venue, or other committee member’s institutions. Participants of this meeting include the Annual Meeting Organizing Committee and select other appointees as needed to help ensure a variety of immunologic fields are represented. The following is prepared for the in-person meeting:

- In-person meeting agenda (created and approved by Abstract chairs 3-4 weeks before meeting)
- Restaurant reservations for night before meeting
- Catering order for in-person meeting (breakfast, lunch and beverages)
- Folders (Agenda, Excel Reports: All abstracts by average scores, All abstracts by presenter’s last name, newsworthy abstracts, all abstracts by category and presentation type, programming grid of oral abstracts, PDF report of full-text abstracts by rating, CD of all reports, FOCIS promo piece, expense voucher and label on front.)

After the in-person meeting, notifications regarding acceptance or rejection are sent by the FOCIS staff to the presenting author only via email indicating placement (oral or poster) within the FOCIS program as well as if a travel award has been issued for the abstract. This email will contain the title, date and time of the oral or poster session in which the abstract has been programmed. Co-authors will not receive notification. These notifications should be sent approximately four months prior to the meeting.
After the in-person meeting, thank you notes are emailed to all abstract reviewers (online and in-person), that includes complimentary registration directions (i.e. promo code). In-person meeting participants are also provided up to $500 in reimbursement for airfare and ground transportation and one night of lodging.

All authors on each abstract MUST submit a completed disclosure form. If all authors have not completed a disclosure form prior to the posted deadline, the abstract may automatically be withdrawn from consideration. This policy has been established in cooperation with ACCME guidelines.

Graphic elements, such as charts, pictures, etc., may NOT be included in abstract submission and will not be considered.

Abstracts that have been or will be published prior to the time of presentation at the Annual Meeting may be submitted. Exception: If additional data/research is added to a previously published abstract, the abstract may be submitted.

Following original notification, presenters are given two weeks to register for the meeting and submit a disclosure form. If they have not registered/submitted a disclosure form, their abstract is withdrawn. Three months prior to meeting, final poster IDs and set-up/take-down times are sent to poster presenters who have registered and have completed a disclosure forms from all authors on the abstract.

Travel awards are available to select abstract presenters chosen for presentation. The number and amount of awards made is based upon several factors including geographic location, placement of abstract within the FOCIS program and funds available.

**Travel Award Requirements:**
1. Abstracts must be submitted through the abstract submission website at www.focisnet.org by the deadline.
2. Abstracts that are selected for thematic or oral presentation and are FOCIS members will be automatically considered.
3. Travel award recipients must keep all receipts for reimbursable expenses (including registration, airfare, hotel accommodations, etc.) and submit these original, itemized receipts, along with the FOCIS reimbursement voucher, which will be given to all recipients. Poster printing and meeting registration are not reimbursable expenses.

**Sample Abstract**
(1) Foxp3 (Scurfy) Mutation Greatly Accelerates Diabetes in Insulin-specific TCR Transgenic Mice
(2) Jean Jasinski1, Maki Nakayama1, Kelly Johnson1, Liping Yu1, George Eisenbarth1, University of Colorado Health Sciences Center, Barbara Davis Center, Aurora, CO
(3) Previously we developed and described the development of a transgenic mouse expressing an insulin-specific (ins2 B:9–23) T cell receptor mouse model (BDC12-4.1). This pathogenic model exhibited spontaneous diabetes development on a backcross-1 (FVB×NOD)×NOD background. (Abstract is continued; this is a sample only.)

(1) = Title: Mixed case, no punctuation at end.
(2) = Author Information: In proper author order with all institutional information included.
(3) = Abstract Body: 250 word count, not including abstract title or author information.
**Charts or graphics of any kind may NOT be included in abstract submission.**

Two months prior to meeting, late-breaking abstracts may be accepted on a case-by-case basis if it is shown that the data in the abstract was unavailable prior to the published deadline and is of exemplary scientific merit. Late-breaking abstracts are not eligible for travel awards.

**Late Breaking Abstract Criteria:**
- The work is significant to the field of clinical immunology, uses appropriate study design, analytical and experimental methods and is clearly and logically presented.
- Abstracts that have been or will be published prior to the time of presentation at the FOCIS Annual Meeting may not be submitted unless they contain additional data/research that has not yet been published.
Late breaking abstracts are sent directly to abstract chairs for review. A general consensus of acceptance for a poster presentation is agreed upon. Notification is sent and presenters have three weeks to register for meeting and submit a disclosure form. Late breaking abstracts can only be considered for poster presentations. Two months before meeting, final poster IDs and set-up/take-down times are sent to late-breaking abstract poster presenters.

**Abstract Supplement and Placement in Final Program**

- Two months before the meeting, a Word document of all abstracts is exported from the abstract system. The export is to be sorted by presentation type and day that includes Final IDs, Title, authors, institutions, and the abstract body. This report is carefully proofread for consistency and accuracy by FOCIS staff. This information is then used as the basis for the Abstract Supplement. Reports of all abstracts by pillar, category and presenting author are also run and a Table of Contents is created.

**Abstract Supplement Formatting Example:**

**OR.3. Cytosolic DNA-activated Human Dendritic Cells are Potent Activators of the Adaptive Immune Response**

Katalin Kis-Toth\(^1\), Attila Szanto\(^2,3\), To-Ha Thai\(^1\), George Tsokos\(^1\). \(^1\)Beth Israel Deaconess Medical Center, Boston, MA; \(^2\)Massachusetts General Hospital, Boston, MA; \(^3\)Harvard Medical School, Boston, MA

Recent studies in cell lines and genetically engineered mice have demonstrated that cytosolic double-stranded (ds) DNA could activate dendritic cells (DCs) to become effector antigen presenting cells. Recognition of DNA might be a major factor in antimicrobial immune responses against cytosolic pathogens and also in human autoimmune diseases such as systemic lupus erythematosus. However, the role of cytosolic dsDNA in human DC activation and the effects on effector T and B cells are still elusive. Here we demonstrate that intracellular dsDNA is a potent activator of human monocyte-derived DCs, as well as primary DCs and depends on NF-κB activation and partially on the adaptor molecule IPS-1, but not on the previously recognized dsDNA sentinels AIM2, DAI, RNA polymerase III or HMGBs. More importantly, we report for the first time that human dsDNA-activated DCs, rather than LPS- or inflammatory cytokine cocktail-activated DCs, represent the most potent inducers of naïve CD4+ T cells to promote Th1-type cytokine production and to generate CD4+ and CD8+ cytotoxic T cells. dsDNA-, but not LPS- or cocktail-activated DCs induce B cells to produce complement fixing IgG1 and IgG3 antibodies. We propose that cytosolic dsDNA represents a novel, more effective approach to generate DCs to enhance vaccine effectiveness in reprogramming the adaptive immune system to eradicate infectious agents, autoimmunity, allergy and cancer.

-To prepare the above report for inclusion in the Final Program, delete the body of the abstract text.

**Final Program Formatting Example:**
## Annual Meeting Abstracts Timeline

<table>
<thead>
<tr>
<th>Task</th>
<th>Abstract Coordinator/ Director of Meetings</th>
<th>FOCUS Abstract Chair(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>One year before meeting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vendor is chosen for abstract submission</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td><strong>Eight months before meeting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Abstract submission opens</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Confirm Abstract Committee Chair, and invite Co-Chair</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td><strong>Six months before meeting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invite the members of the Annual Meeting Organizing Cmte, 2-3 representatives appointed from each key constituencies, past reviewers and any other invited candidates to review abstracts</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Send 3 invitation emails, requesting specialties they are comfortable reviewing</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Secure date and location for in-person review meeting</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Abstract submission ends</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If needed, abstract deadline is extended</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Abstracts that were placed in the &quot;other&quot; category are assigned to closest category so abstracts can be reviewed appropriately</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Each abstract is assigned to three different reviewers based up reviewer’s specialty and abstract category</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td><strong>Five months before meeting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ask vendor for following reports: 1. All presenting authors who haven't completed their disclosure forms 2. Duplicate accounts report</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Online abstract review; instruction and reminder emails are sent</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>All abstracts that need additional review are sent to FOCUS organizing committee for suggestions/review</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Abstract scores are complied, then averaged and exported from the system into an excel document, sorted by average score. This report along with a PDF of full abstract content is sent to FOCUS organizing committee for review and initial oral presentation programming</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Reminder email sent ensuring all presenting authors have disclosure complete</td>
<td>x</td>
<td></td>
</tr>
</tbody>
</table>
### Annual Meeting Abstracts Timeline

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Abstract Coordinator/ Director of Meetings</th>
<th>FOCIS Abstract Chair(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agenda for in-person meeting is created and approved by committee</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Agenda, Abstracts by average score and Abstract full content is sent to all in-person meeting attendees</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>The following is prepared for in-person meeting:</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>- Restaurant reservations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Catering order (breakfast, lunch and beverages)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Folders (Agenda, Reports: (excel) All abstracts by average scores, All abstracts by presenter's last name, newsworthy abstracts, all abstracts by category and presentation type, programming grid of oral abstracts, (pdf) full abstract text by rating) CD of reports, FOCIS promo piece, Label on front, expense voucher</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Four months before meeting</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>In-person meeting: final programming</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notifications regarding acceptance or rejection are sent to contact/presenting author via email indicating placement within the FOCIS program as well as if a travel award has been issued. This email contains title, date and time of the oral or poster session in which the abstract has been programmed.</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Thank you cards are sent to abstract reviewers</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Reminder emails sent to poster presenters to register/complete disclosure by 21st or abstract will be withdrawn</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online vendor is re-opened and late breaking abstracts are accepted</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Abstract poster presenters must be registered by this date or abstract will be withdrawn</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final poster IDs and set-up and take-down times are sent to poster presenters</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Three months before meeting</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Late-breaking abstracts are sent to FOCIS Organizing Cmte for review</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notification for late breaking abstracts sent to presenting authors</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Late-breaking abstract presenters must be registered and have disclosures completed by this date or abstract will be withdrawn</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final poster IDs and set-up and take-down times are sent to late breaking abstract poster presenters</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Start creating abstract supplement with following formatting:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>One month before meeting</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Create tracking sheets for travel awards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ask vendor for following report: All authors and final IDs alphabetized by last name (to use for Abstract Supplement Indices)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 7. Posters

Three poster sessions will be held during the meeting. Posters are setup in the morning, with optional poster hours over the lunch hour and mandatory author appearance in the evening for questions.

Each poster will be given a number based on the day it is being presented and the board on which it should be presented. The boards will be clearly labeled by the Meetings Manager.
Poster presenters are required to register for the Annual Meeting in order to be listed in the abstract book and program. (SC 5/16/05). The deadline for registration is typically 14 weeks prior to the meeting.

Poster of distinction ribbons will be awarded to the top-ranked 10% of all programmed posters. These posters receive special recognition in the Final Program, as well as a ribbon on their poster during the day of their presentation.

8. Exhibitors
Member Societies - Exhibit Space Agreement should offer reciprocal exhibition opportunity at cost or free of charge. (SC: 10/6/04) Member Societies that host a symposium at the FOCIS Annual Meeting are eligible to receive a complimentary 10’x10’ booth if they want to have a presence in the exhibit hall. The complimentary booth should be coded to exhibitor income and a promotional code should be created in YourMembership.com tied to the product so they can register for the booth on their own online.

All exhibit space is offered on a first-come, first-served basis. Should available exhibit space fill before the deadline for space reservations, FOCIS may refuse subsequent applications for space. FOCIS does not guarantee the placement of any exhibitor’s booth. Rules of engagement are to be followed in the Exhibit Hall.

Manufacturers, distributors, publishers, pharmaceutical and biotech companies, and suppliers of products and services for physicians and researchers involved in clinical immunology are invited to participate in the exhibition.

Each exhibit space is eligible for up to two complimentary exhibitor registrations for table tops and 10x10 booths. For 10x20 booths, up to 5 complimentary exhibitor registrations are allowed. This registration allows only access to the FOCIS Poster & Exhibition Hall and access to the scientific sessions. Poster & Exhibition Hall staff is responsible for arranging their own lodging.

An Exhibitor Prospectus will be developed by the Meetings Manager and be distributed to past and potential exhibitors approximately eight months prior to the meeting. This document includes information about the exhibit hall (hours, set-up, tear-down, policies, procedures) as well as an exhibitor application, advertising reservation form, mailing label request form and bag insert reservation form.

Exhibitor Service Kits will be distributed by the designated exposition vendor approximately two months prior to the meeting. The Service Kit must include a final Exhibit Hall floor plan and information on exhibit staff registration and hotel accommodations.

All booth giveaways must be pre-approved by FOCIS and must following giveaway guidelines. Be sure to check local city and state regulations when developing giveaway guidelines.

9. Registration
A. Pre-registration
Ten months prior to the Annual Meeting, design of the online registration system will begin. The online registration site is run through YM. The site collects basic user information such as badge name, contact phone number, address, etc. as well as demographic information that are used to define FOCIS Annual Meeting attendees. Registrants have the option to register at different rates depending on their membership status and their training/education level. There is also an option to add additional FOCIS courses (i.e. Basic and Interventional) to base registration.

Upon receipt of the submitted registration form and full registration fee, each delegate will receive a confirmation of registration via e-mail. The confirmation e-mail acts as the receipt for the meeting. This confirmation e-mail is proof of paid registration fees.
Discounted registration rates are available to delegates who register at least one month prior to the meeting. Delegates who book their hotel rooms at the headquarter hotel(s) are eligible to receive further meeting registration discounts if they are registered at least one month prior to the hotel cutoff date.

Delegates that pre-registered prior to the early registration deadline will receive their registration materials via post. International registration packets will be mailed one month prior to the meeting, while domestic packets will be mailed two weeks prior.

Programs and other materials will be available on site to pre-registered delegates and may be collected at the Registration Desk.

B. On-Site Registration
Delegates who register onsite must complete a registration form and present an approved form of payment. Onsite registrants receive a name badge and other materials at the time of registration. Programs, and other materials are available in limited quantities and are distributed on a first-come, first-serve basis to onsite registrants. Materials will be distributed with first priority to pre-registered delegates.

10. Payment
Registration forms are not accepted without payment by an approved method. Approved methods for online registration include cash, check, VISA & MasterCard. American Express and wire transfers may be accepted with paper registration forms only.

Refunds on registration fees are available until 6 weeks prior to the meeting. No refunds will be made after this date, or following the meeting (except in extreme circumstances, as determined by FOCIS Meetings Manager and Executive Director). A $30 cancellation fee applies to all cancellations made more than one month prior to the meeting.

Transfer of registration fees from one delegate to another is allowed only until the refund deadline, 6 weeks prior to the meeting. A $30 fee applies to all registration transfers.

11. Travel Awards
Travel awards are available to select abstract presenters chosen for presentation at the meeting, who are FOCIS members. Awards are generally $750 and can be used for any meeting-related expenses, including registration.

Travel award winners must submit an expense voucher and original receipts for all claimed expenses before the deadline, approximately four weeks after the close of the meeting.

FCE Fusion participants receive $500 travel award and complimentary meeting registration. (EC:12/5/05)

12. Reimbursement
See Reimbursement chart in Policy Manual. No reimbursement will be paid after one year has passed.

13. Travel
Travel must be booked at least 14 days in advance, coach only for US flights.

Transoceanic travel should also be booked at least 14 days in advance. For business/first class, individuals should use personal or organizational miles for upgrades whenever possible. Otherwise, transoceanic travel may be reserved up to $1,250 per ticket; subject to prior approval by the FOCIS Executive Director in consultation with the FOCIS Executive Committee.
14. Hotel Accommodations
Registration for the meeting does not include a room reservation. A FOCIS negotiated, special meeting rate is available at the headquarter hotel. Delegates must make their hotel reservations prior to the cutoff date to be guaranteed the rate. If all FOCIS rooms at the discounted rate are sold, the Meetings Manager will negotiate with the hotel to try and secure more rooms.

Hotel reservations can be made online through a specially designed FOCIS reservations site that is created by the hotel or reservations can be made via phone.

The Meetings Manager will keep a VIP housing list for all FOCIS Board of Directors and other VIPs whose hotel rooms will be paid for directly by FOCIS. The final VIP housing list will be submitted to the hotel at least four weeks prior to the meeting.

Suites should be secured as a complimentary component of the overall hotel contract. Staff rated rooms (at 50% off group rate) should also be secured. In addition, all hotel contracts of 50 rooms or more should include a 1/40 or 1/50 clause which gives FOCIS one complimentary room night per 40 or 50 room nights sold.

The FOCIS President will receive the largest available suite in the hotel, preferably with a separate seating area for meetings. The FOCIS President-Elect will receive the second largest available suite in the hotel. Any additional suite upgrades will be allocated to the FOCIS Treasurer, FCE Chair and Organizing Committee Chairs, in that order. The rates for these suites should be negotiated in the hotel contract.

15. General
FOCIS has officially been accepted as an IUIS affiliate Member and the relationship is not reciprocal. IUIS will receive 1 complimentary ad, booth space at the Annual Meeting. (EC:1/25/04)

The FOCIS meeting pattern in Thursday through Sunday.

The hotel should not replenish soda and water orders above the quantity ordered on the BEO without prior approval of FOCIS Meetings Manager or Executive Director.

If boxed lunches are provided, note on signs and in the program that these lunches are available in limited quantities. Provide attendees with a list of nearby restaurants either in the program, registration materials or available at a central location.

For all functions with coffee or tea, request that the cups used be eight (8) ounces or smaller. In one gallon of coffee there are 16 eight ounce servings or 12.8 ten ounce servings or 10.6 twelve ounce servings. By reducing the size of the cup more attendees have coffee, there is less waste and it is more cost-effective.

16. Annual Meeting Timeline
See timeline in Appendix A

II. EDUCATIONAL COURSES (FOCISed)
FOCIS exists to improve human health through immunology. Consistent with this mission, FOCIS created its educational portfolio, FOCISed, to foster the training and education of basic and clinical scientists in interdisciplinary approaches to perform the best research, develop new tools and provide new insights into immunological diseases. Currently FOCIS offers three educational courses:

1. The Advanced Course in Basic & Clinical Immunology
Overview - This course has been held annually since 2006 in either February or March in Scottsdale, Arizona. Students in this course include clinical fellows, trainees and researchers in the pharmaceutical industry, and practicing academic physicians who
need to enhance their understanding of immunology. Invited speakers lecture on the major topics in cellular and molecular immunology, including innate immunity, B cells, T cells and cytokines. Special sessions cover new advances in interventional clinical immunology and the molecular and genetic basis of immunologically-mediated diseases. There is ample opportunity for students to interact with the faculty outside of the lecture room.

Schedule – The course takes place over 2 ½ days, with an opening reception and networking on Sunday evening, followed by 2 ½ days of education. The course ends at noon on Wednesday.

Promotions and registration – The marketing campaign for this course launches in October with the opening of registration. A post card is developed and sent to targeted lists, and numerous blast emails are sent to the entire FOCIS database. Registration is closed when the course reaches capacity, usually by the beginning of January. Typically, the course fills at 130 attendees from all over the world.

Advanced Course: Administrative timeline

<table>
<thead>
<tr>
<th>Action</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Save the Date for next year's Advanced Course</td>
<td>Early July</td>
</tr>
<tr>
<td>Draft Fundraising Plan</td>
<td>Mid July</td>
</tr>
<tr>
<td>Update Needs Assessment and Learning Objectives</td>
<td>Early August</td>
</tr>
<tr>
<td>Poster/postcard design request</td>
<td>Mid-August</td>
</tr>
<tr>
<td>Send Program to FOCIS Constituents</td>
<td>Mid-August</td>
</tr>
<tr>
<td>Begin grant requests</td>
<td>Mid-August</td>
</tr>
<tr>
<td>FB/LI: Post program on Facebook/LinkedIn</td>
<td>Mid-August</td>
</tr>
<tr>
<td>Complete Grant Requests</td>
<td>Late August</td>
</tr>
<tr>
<td>Draft Call for FCE Travel Grant Nominees</td>
<td>Early September</td>
</tr>
<tr>
<td>Follow-up: COI Forms</td>
<td>Mid-September</td>
</tr>
<tr>
<td>FB/LI: Announce Faculty with Photos/bios</td>
<td>Mid-September</td>
</tr>
<tr>
<td>Email: Save the Date</td>
<td>Mid-September</td>
</tr>
<tr>
<td>Send Update to Faculty with Final Agenda and Times</td>
<td>Mid-September</td>
</tr>
<tr>
<td>Begin Online Registration Site Design</td>
<td>Early October</td>
</tr>
<tr>
<td>Finalize Disclosure Collection and Send for Review</td>
<td>Early October</td>
</tr>
<tr>
<td>Send FCE Travel Award Nomination Email</td>
<td>Late October</td>
</tr>
<tr>
<td>eBlast: Advanced Course Promotion</td>
<td>Mid-November</td>
</tr>
<tr>
<td>Request speaker travel info / send with guidelines</td>
<td>Mid-December</td>
</tr>
<tr>
<td>Send Email Reminder to FCE Travel Award Recipients</td>
<td>Mid-December</td>
</tr>
<tr>
<td>Check Room Block</td>
<td>Early January</td>
</tr>
<tr>
<td>Update Online Slide Site</td>
<td>Early January</td>
</tr>
<tr>
<td>Send Pre/post Test Question Reminder</td>
<td>Early January</td>
</tr>
<tr>
<td>Send Syllabus Cover to Design</td>
<td>Mid-January</td>
</tr>
<tr>
<td>Remind Speakers for Slides</td>
<td>Mid-January</td>
</tr>
<tr>
<td>Follow-up on All Grant Requests</td>
<td>Mid-January</td>
</tr>
<tr>
<td>Event</td>
<td>Deadline</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Send Draft Pre/post Test to Organizers</td>
<td>Mid -January</td>
</tr>
<tr>
<td>Send Email: East Coast/Midwest: Escape the Cold!</td>
<td>Mid -January</td>
</tr>
<tr>
<td>Send Email: West Coast - Easy Travel!</td>
<td>Mid -January</td>
</tr>
<tr>
<td>FB/LI: Limited spots remain for Advanced Course</td>
<td>Mid -January</td>
</tr>
<tr>
<td>Deadline for Pre/post Questions</td>
<td>Late January</td>
</tr>
<tr>
<td>Distribute Faculty Slides for Review Prior to Course</td>
<td>Late January</td>
</tr>
<tr>
<td>Send &quot;Please Forward&quot; Email to Past FOCISed Attendees</td>
<td>Late January</td>
</tr>
<tr>
<td>Update Onsite Course Signage</td>
<td>Late January</td>
</tr>
<tr>
<td>Contact Super Shuttle to Get Shuttle Discount for Attendees</td>
<td>Late January</td>
</tr>
<tr>
<td>FB/LI: Ten Reasons Why Course is Worthwhile</td>
<td>Late January</td>
</tr>
<tr>
<td>Email Shuttle Information to attendees</td>
<td>Late January</td>
</tr>
<tr>
<td>FB/LI: Teaser video for Advanced Course</td>
<td>Late January</td>
</tr>
<tr>
<td>Last Day to Revise Rooming List Without Penalty</td>
<td>Late January</td>
</tr>
<tr>
<td>Rooming List Due to Hotel</td>
<td>Late January</td>
</tr>
<tr>
<td>Create Rotating Slide Set for Onsite</td>
<td>Late January</td>
</tr>
<tr>
<td>Speaker Slides Due</td>
<td>Early February</td>
</tr>
<tr>
<td>Compile Pre/post Test</td>
<td>Early February</td>
</tr>
<tr>
<td>Select Menus for Advanced Course</td>
<td>Early February</td>
</tr>
<tr>
<td>Prepare Rooming List</td>
<td>Early February</td>
</tr>
<tr>
<td>Deadline: Ship to Arrive</td>
<td>Early February</td>
</tr>
<tr>
<td>Email course attendees and speakers hotel confirmations</td>
<td>Early February</td>
</tr>
<tr>
<td>FB/LI: Advanced Course starts today!</td>
<td>Early February</td>
</tr>
<tr>
<td>FB/LI: Session Objectives for Advanced Course</td>
<td>Early February</td>
</tr>
<tr>
<td>Menus Due to Hotel</td>
<td>Early February</td>
</tr>
<tr>
<td>FB/LI: Thank attendees (with photo)</td>
<td>Early February</td>
</tr>
<tr>
<td>Send Speaker Dinner Invitation</td>
<td>Early February</td>
</tr>
<tr>
<td>Update Abul's Opening Slide Presentation</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Send Pre-test to Attendees via Email</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Send Summary Pre-test Results to Faculty</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Update new slides on slide site</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Send expense vouchers to speakers / travel grantees</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Post Pre/post Test Questions in Survey Monkey</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Send Reminder to Complete Pre-test</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Draft Attendee Evaluation</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Send evaluation for day #1</td>
<td>Mid-February</td>
</tr>
<tr>
<td>FB/LI: create Photo Album on FB</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Send evaluation for day #2</td>
<td>Mid-February</td>
</tr>
<tr>
<td>Send evaluation for day #3</td>
<td>Mid-February</td>
</tr>
</tbody>
</table>
2. Basic Immunology in Medicine Update

Overview - This course was launched in 2002 because of the realization that the rapid pace of research is leading to fundamental advances in the understanding of immune responses and their abnormalities. Staying abreast of these advances is essential for practitioners of medicine and for researchers in academia and industry. As new immunotherapeutic strategies are being developed and adopted, it is important to understand the rationale behind these therapies, and this also requires an appreciation of the fundamentals of immunology. This course is designed to provide a sophisticated review of selected basic principles and an update on new advances, especially those that are most relevant to human disease.

Schedule – This course takes place over one full day with a break for lunch.

Promotions and registration – This course is held immediately preceding the FOCIS Annual Meeting and thus coordinates with the annual meeting promotion timeline. A postcard advertising both the Basic and Interventional courses is sent in April, followed by an extensive blast email campaign. Basic and Interventional are marketed separately and also as a package. Discounted rates apply when registration to both courses is purchased.

Administrative timeline – The timeline for the Basic Course is combined with the Interventional Immunology course and may be found below.

3. Interventional Immunology

Overview - This course provides education on the many new therapies that are currently available or in development which are based on targets that are unfamiliar to many practicing physicians. There is potentially great value for, but lack of, cross-disciplinary reviews of these types of therapies. The content of this course includes a review of the basis for choice of immunologically related therapeutic targets in various diseases, including organ specific and systemic autoimmunity, allergy, transplant rejection, cancer and HIV. The goal is to help attendees understand the rationale and mechanism underlying the major pharmacologic approaches for interventional immunology in their current practice and review the track record of the different therapeutic approaches in different specialties.
Schedule – This is a full-day course with a break for lunch.

Promotions and registration - This course is held immediately preceding the FOCIS Annual Meeting and thus coordinates with the annual meeting promotion timeline. A postcard advertising both the Basic and Interventional courses is sent in April, followed by an extensive blast email campaign. Basic and Interventional are marketed separately and also as a package. Discounted rates apply when registration to both courses is purchased.

FOCISed Courses Administrative timeline

<table>
<thead>
<tr>
<th>Action</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Facebook Photo Album of FOCISed classes</td>
<td>Early July</td>
</tr>
<tr>
<td>Draft Post-meeting Follow-up Surveys</td>
<td>Early July</td>
</tr>
<tr>
<td>Draft Post-meeting Reports</td>
<td>Early July</td>
</tr>
<tr>
<td>Draft Agenda and Identify Speakers for next year</td>
<td>Early September</td>
</tr>
<tr>
<td>Send Speaker Invitations, Request CIO Disclosures</td>
<td>Mid-September</td>
</tr>
<tr>
<td>Set Development Targets</td>
<td>Late September</td>
</tr>
<tr>
<td>Request Faculty Photos, Bios, Learning Objectives</td>
<td>Late September</td>
</tr>
<tr>
<td>Update FOCISed Registration Sites</td>
<td>Early November</td>
</tr>
<tr>
<td>Design FOCISed Promotional Slide</td>
<td>Early November</td>
</tr>
<tr>
<td>Add Learning Objectives, Photos and Biographies to Website</td>
<td>Early November</td>
</tr>
<tr>
<td>Send Promo Slide to BOD, Steering Committee, etc</td>
<td>Early December</td>
</tr>
<tr>
<td>Follow-up on COI Communications</td>
<td>Mid December</td>
</tr>
<tr>
<td>Begin Grant Requests for FOCISed Courses</td>
<td>Early January</td>
</tr>
<tr>
<td>FB: Registration is open!</td>
<td>Mid-January</td>
</tr>
<tr>
<td>eBlast: FOCISed Email #1</td>
<td>Mid-January</td>
</tr>
<tr>
<td>High Priority Grant Requests Due</td>
<td>Mid-January</td>
</tr>
<tr>
<td>Finalize Grant Requests</td>
<td>Late January</td>
</tr>
<tr>
<td>FOCISed Email #2</td>
<td>Early February</td>
</tr>
<tr>
<td>FB: Course Speaker Bios</td>
<td>Late February</td>
</tr>
<tr>
<td>FOCISed Email #3</td>
<td>Early March</td>
</tr>
<tr>
<td>FOCISed Email #4</td>
<td>Early March</td>
</tr>
<tr>
<td>FOCISed Email #5</td>
<td>Mid-April</td>
</tr>
<tr>
<td>FB: Lazy Saturday: Coffee, Pajamas, and FOCISed online!</td>
<td>Mid-April</td>
</tr>
<tr>
<td>FB: Registration for FOCISed closes in a month</td>
<td>Late April</td>
</tr>
<tr>
<td>FOCISed Email #6</td>
<td>Early May</td>
</tr>
<tr>
<td>FB: FOCISed closes in 2 weeks!</td>
<td>Mid May</td>
</tr>
<tr>
<td>Request pre/post-test questions from faculty</td>
<td>Mid May</td>
</tr>
<tr>
<td>FB: FOCISed Registration is coming fast. Register today!</td>
<td>Mid May</td>
</tr>
<tr>
<td>References and pre/post questions due from faculty</td>
<td>Late May</td>
</tr>
<tr>
<td>FB/LI: Last call for FOCISed Register today!</td>
<td>Late May</td>
</tr>
<tr>
<td>Send Last Call for FOCISed Registration</td>
<td>Late May</td>
</tr>
<tr>
<td>Create evaluations and pre/post-tests</td>
<td>Late May</td>
</tr>
<tr>
<td>Request slides from faculty</td>
<td>Early June</td>
</tr>
<tr>
<td>FB/LI: Registering onsite for FOCISed Courses</td>
<td>Early June</td>
</tr>
<tr>
<td>Create rotating slide presentation</td>
<td>Early June</td>
</tr>
<tr>
<td>FB/LI: Can't make convention? Do FOCISed online</td>
<td>Early June</td>
</tr>
<tr>
<td>Distribute expense vouchers to faculty</td>
<td>Mid-June</td>
</tr>
<tr>
<td>FB: You can still register on site for FOCISed</td>
<td>Mid-June</td>
</tr>
<tr>
<td>Post slides, materials and rosters online</td>
<td>Mid-June</td>
</tr>
</tbody>
</table>
III. DEVELOPMENT

1. Overview
Fundraising is a collaborative staff effort that takes place throughout most of the year. Funds are solicited from corporations, government agencies, foundations and other organizations / associations. There are generally three funding categories: Annual Meeting, Advanced Course in Basic & Clinical Immunology and FOCISed.

Annual Meeting - Fundraising efforts for the FOCIS Annual Meeting begin approximately one year prior to the meeting, with grants and requests being submitted from October through March.

Advanced Course in Basic & Clinical Immunology – Fundraising for this course is run separately from the annual meeting and other FOCIS educational courses since it occurs at a different time. Grants are submitted in August and September for this February / March course.

FOCIS(ed) – Fundraising for these courses follow the same timeline as annual meeting fundraising since these two course occur just prior to the annual meeting.

2. Fundraising processes
Funds are requested through a variety of methods: online grant requests, written proposals, general inquiries / letters of requests and phone calls.

Online grant requests / emailed proposals:
- Locate the company’s grant website (search “Pfizer grants,” or call the company and ask since some sites are only available upon request).
- Enter required information and attach applicable documentation. General template information is saved in the Grants General folder under the applicable year’s funding folder. If an emailed proposal, prepare the request in the specified manner with all supporting documents.
- Print all information when completed and submit to manager for review prior to submission.
- Once reviewed make any necessary corrections and submit / email the grant request.
- Print the grant / request and file in the FOCIS supporter binders. Current support binders may be located in the hanging file across from Sarah’s desk. Support binders from previous years may be located in the mail room, above the filing cabinets.

General Inquiries / Letters of Request.
- If a company does not have a specific grants website, make contact (either phone or email) and ask to whom a letter of request or marketing proposal should be directed to.
- Write a letter of request (templates for the annual meetings exist in the Grants General folder for previous years) along with the support opportunities brochure. Make it clear that FOCIS is willing to customize support opportunities for specific companies.

Phone calls
- Phone calls should be made to supplement any general requests. If no grant opportunities exist, ask to speak with someone in marketing and highlight visibility opportunities as outlined in the support opportunities brochure.
- Specify that the company name / logo will appear in multiple places: FOCIS website, Annual Meeting Final Program and in onsite signage.
- Log the phone call information (date, time, person with whom you spoke, summary of what was discussed) in all appropriate tracking sheets (outlined below).

Documentation
- Any fundraising effort must be documented in the Working Report, Fundraising Spreadsheet, and Supporter Summary by Category.
- When a new entry is made in the Supporter Summary by Category, it should be saved under a new date.
- All information should appear with the most recent communication first or on top.
- All of these documents are saved in the Grants General folder.

Procedures for grant approval
- When funds are promised, this should be reflected in the Commitment Report, which summarizes progress and shows explicitly the gap between current standing and goal.
- Promised funds should also be filed in the Accounts Receivable folder with the appropriate account code specified.
- Staff must ensure a letter of agreement is signed in advance of the meeting and that a high resolution company logo is collected for inclusion in the final program.

IV. FINANCES AND BUDGETING

1. General

Treasurer Packets – Sent by FedEx, 2nd day.

Credit Card Processing - Credit card activity (the bulk of registration income) is generated online via the FOCIS website through YourMembership (YM) using PayPal payment processor for electronic receivables.

FOCIS Credit Card & Executive Director Expenses - Charges by authorized FOCIS staff are charged to one credit account in FOCIS / Mike Mathy’s name. Approved charges are coded and a report is emailed to the Treasurer for approval. Once approved, FOCIS credit card is paid online

Treasurer’s Records - Physical files are currently housed in P.J. Utz’s office. (2/27/08)

Financial Statements – The bank accounts are reconciled monthly and then the financial statements are prepared by the Finance & Administration Manager. Financial statements will include the: 1) Statement of Financial Position; 2) Statement of Activities. Statements are to be on accrual vs. cash basis.

FOCIS Bank Account Information

Bank Name: BMO Harris Bank
Address: 111 E. Kilbourn Avenue. Suite 1250 Milwaukee, WI 53202
Routing no: 071000288
SWIFT code: HATRUS44
Bank Acct: 0056139006
Benefit of: Federation of Clinical Immunology Societies
2. Check Signing & Bill Processing
Authorized signors include President, Treasurer, and Executive Director. Checks over $2,500 require two signatures. Checks in the amount of $2,500.01 and more must be signed by the Executive Director and the Treasurer. Invoices are paid approximately twice per month. Revert to the Association Acumen Office Procedures Manual for invoice processing. Checks sent to the treasurer for signature, will include a self-addressed stamped envelope and will be mailed by treasurer.

3. Accounts Receivable
Revert to the Association Acumen Office Procedures Manual.

To deposit checks:
Revert to the Association Acumen Office Procedures Manual.

Accrual Receivable:
When a signed contract (or Letter of Agreement) is received, funding is confirmed and the receivable will be entered into QuickBooks using the following steps:

1. Receive contract, route to Executive Director for signature
2. Obtain any other necessary signatures (i.e. Joint CME sponsor)
3. Make a copy of the fully executed contract and file in the funding binder (Bible).
4. Scan contract and file in the Accounts Receivable folder to be entered into QuickBooks.

Electronic Receivables:
Revert to the Association Acumen Office Procedures Manual

NIH Grant Fund Withdrawal
1. Go to the Division of Payment Management (DPM) Home Page at (http://www.dpm.psc.gov)
2. Click on “PMS” or “SmartLink”, located at the top right hand corner
3. Click on the “SmartLink Payment Request” and enter the following information:

   SmartLink USERNAME: KRAUSESB8161
   SmartLink PASSWORD: ParkPlace11950

4. Click the Click Here for Access to the Payment Management System
5. Click Payment in the left navigation bar
6. Click Request for Payment
7. Enter account number B8161G1 and click the Account button
8. Enter a payment due date of tomorrow’s date
9. Enter the amount you are requesting in the Expected Disbursement Amount box and the Payment Request Amount boxes
10. Enter 0 in the cash on hand box unless you have withdrawn funds and not used them yet
11. Click continue

Funds will be automatically deposited in the FOCIS checking account.

NIH Grant Fund Financial Reporting
In order to account for your use of Federal funds, beginning with the period ending September 30, 2007, you are required to complete the PSC Federal Cash Transaction Reports (PSC 272 and PSC 272-A). As part of the Division of Payment Management’s continuous efforts to improve customer service, we have converted your account to the “Electronic PSC 272 System”. This new process will facilitate the exchange of information between respective offices and eliminate handling of the paper PSC 272. In order to access your Electronic PSC 272 Federal Cash Transactions Report, go to the DPM Home Page at http://www.dpm.psc.gov and click on “Elect. 272” located at the top right hand corner. You should now be on the
DPM Secure Systems Login Links Page where you will see three choices. To access your PSC Federal Transactions Report, click on “Electronic 272 Reporting” and enter the following information:

Electronic 272 PIN: B8161
Electronic 272 Password: 6665944594
Note: This information for 272 Report Never changes or expires

After you enter your PIN and Password, select your PAN, and then select the PSC 272 form to view. You can print your PSC 272 using the print function contained in your Internet browser software. This will complete your PSC 272 processing. If you discover any discrepancies in the PSC 272 data, you should contact your DPM account representative. Please remember that although your disbursement data is being electronically transmitted, you are still required to print, sign and mail in the PSC 272 certification page. THE PSC 272 IS DUE 45 DAYS AFTER THE END OF EACH QUARTER (i.e. February 14th, May 15th, August 14th, and November 14th) and the dates for which the new quarters PSC 272 data availability will be announced through the SmartLink Payment System’s bulletin board at the end of each quarter. **IF YOU DON'T FILE YOUR REPORT ON OR BEFORE THE DUE DATE, YOUR FUNDS WILL BE FROZEN.**

4. Accounts Payable

5. Procedure for Treasurer’s Packet

6. Reimbursements

7. Refund Procedures

Checks

Wire Transfer

III. FOCUS CENTERS OF EXCELLENCE

1. FCE Directors Meeting
FCE Directors will receive $750 in travel reimbursement. (EC: 12/5/05)

FCE Fusion (formerly TSS) trainees will be reimbursed up to $500 for participating in Fusion and receive complimentary meeting registration. Non-participation in event precludes the trainee from receiving reimbursement. (EC:12/5/05)
<table>
<thead>
<tr>
<th>Action</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send FCE Fusion Post Meeting Survey(s) to Participants</td>
<td>Early July</td>
</tr>
<tr>
<td>Send Survey Reminder #1</td>
<td>Mid-July</td>
</tr>
<tr>
<td>Send Survey Reminder #2</td>
<td>Mid-July</td>
</tr>
<tr>
<td>FOCIS Fusion Survey Deadline</td>
<td>Mid-July</td>
</tr>
<tr>
<td>Tally FCE Fusion Survey Results</td>
<td>Mid-July</td>
</tr>
<tr>
<td>Distribute FCE Fusion Survey Results to FCE Cmte</td>
<td>Early August</td>
</tr>
<tr>
<td>EBlast: Nominations: Fusion Travel Awards: Reminder #1</td>
<td>Early November</td>
</tr>
<tr>
<td>EBlast: Nominations: Fusion Travel Awards: Reminder #2</td>
<td>Mid-November</td>
</tr>
<tr>
<td>EBlast: Nominations: Fusion Travel Awards: Reminder #3</td>
<td>Late November</td>
</tr>
<tr>
<td>EBlast: Nominations: Fusion Travel Awards: Reminder #4</td>
<td>Early December</td>
</tr>
<tr>
<td>EBlast: Nominations: Fusion Travel Awards: Reminder #5</td>
<td>Late December</td>
</tr>
<tr>
<td>Nominations for trainees due</td>
<td>Early January</td>
</tr>
<tr>
<td>Email to trainees explaining FCE Fusion</td>
<td>Early February</td>
</tr>
<tr>
<td>Invite Poster Review Committee</td>
<td>Late February</td>
</tr>
<tr>
<td>Select FCE Directors to Moderate</td>
<td>Late February</td>
</tr>
<tr>
<td>Invite keynote speakers</td>
<td>Late February</td>
</tr>
<tr>
<td>Invite moderators</td>
<td>Late February</td>
</tr>
<tr>
<td>Circulate FCE Fusion Agenda to FCE Committee</td>
<td>Late February</td>
</tr>
<tr>
<td>Keynote speakers reminder 1</td>
<td>Early March</td>
</tr>
<tr>
<td>Moderators reminder 1</td>
<td>Early March</td>
</tr>
<tr>
<td>Remind any trainee nominees about registration date</td>
<td>Early March</td>
</tr>
<tr>
<td>FCE Directors to critique oral presentation confirmation due</td>
<td>Mid-March</td>
</tr>
<tr>
<td>Keynote speakers reminder 2</td>
<td>Mid-March</td>
</tr>
<tr>
<td>Moderators reminder 2</td>
<td>Mid-March</td>
</tr>
<tr>
<td>Send abstract/registration information to FCE Fusion Trainees</td>
<td>Mid-March</td>
</tr>
<tr>
<td>Finalize FCE Directors Meeting agenda</td>
<td>Mid-March</td>
</tr>
<tr>
<td>Invite FCE Directors to critique oral presentations</td>
<td>Mid-March</td>
</tr>
<tr>
<td>Registration deadline for FCE Fusion fellows</td>
<td>Mid-March</td>
</tr>
<tr>
<td>Prepare FCE Fusion poster review materials</td>
<td>Early April</td>
</tr>
<tr>
<td>Develop FCE Fusion Surveys: trainees &amp; directors</td>
<td>Mid-April</td>
</tr>
<tr>
<td>Create rotating slides for FCE Fusion</td>
<td>Mid-June</td>
</tr>
<tr>
<td>FCE Fusion handouts printed</td>
<td>Mid-June</td>
</tr>
<tr>
<td>Prepare and print poster judge materials</td>
<td>Mid-June</td>
</tr>
<tr>
<td>Print poster group information w/ #s/titles/presenters</td>
<td>Mid-June</td>
</tr>
<tr>
<td>Send FCE Fusion poster review materials to review committee</td>
<td>Mid-June</td>
</tr>
<tr>
<td>Update FCE Benefits infographic: email to FCEs</td>
<td>Early August</td>
</tr>
</tbody>
</table>
2. Governance
FOCIS Centers of Excellence (FCE) are governed by the FOCIS Executive Committee. FCEs within the United States and Canada will report to the North American FCE Chair, while FCEs outside of North America will report to the International FCE Chair. The chairs of each region of FCEs will report to the FOCIS Executive Committee.

3. Accreditation
Applications to become an FCE will be reviewed by the FCE Committee. This committee will be comprised of North American representatives and international representatives. The final decision to accredit lies with the FOCIS Executive Committee.

4. Development
Fundraising for FCEs will be carried out at the local level. FOCIS is not responsible for financially supporting FCEs.

5. Designation
When new FCEs have been approved by the committee, the following steps must be completed:
1) Add the new FCE Director to the National and/or Multinational mailing list in the FOCIS shared address book in Outlook
2) Add the new FCE Director to the National and/or Multinational FCE Committee in NetForum
3) Add them to the FCE website listing on the FOCIS Centers of Excellence National and/or Multinational Locations and Directors page
4) Draft and update the notification letter with attachments to the new director.
   • Samples from previous notifications saved at: S:/FOCIS Centers of Excellence/Designation/FCE Applications/Application Review/Designation Notifications
5) Send notification email to Director with attachments listed on the formal letter
   • Copy the FCE Chair and Multinational Chair (if appropriate) (CMW 1/20/2014)

When new FCEs have had a change in Directors, the following steps must be completed:
1. Remove the old FCE Director and add the new FCE Director to the National and/or Multinational mailing list in the FOCIS shared address book in Outlook.
2. Remove the old FCE Director and add the new FCE Director from the National and/or Multinational FCE Committee in YM
3. Remove the old FCE Director and add the new FCE Director to the FCE website listing on the FOCIS Centers of Excellence National and/or Multinational Locations and Directors page
4. Draft and update the notification letter with attachments to the new director.
5. Samples from previous notifications saved at S:\FOCIS Centers of Excellence/Designation/FCE Applications/Application Review/Designation Notifications
6. Draft notification email to Director asking for a brief bio, photo, and goals for the center
7. Send notification email to Director with attachments listed on the formal letter
8. Copy the FCE Chair and Multinational Chair (if appropriate)
9. Post press release of FCE Director's photo, bio, and goals for the FCE under the news section on the FOCIS homepage, Facebook page, and LinkedIn group (CMW 3/6/2014)

6. Participation
All FCE Directors are invited to attend the FCE Directors Meeting held at the FOCIS Annual Meeting and to participate in the Trainee Satellite Symposium (TSS) held each year at the FOCIS Annual Meeting.

7. Programming
All programs conducted under the FOCIS name must first be approved by the FOCIS Executive Committee. It is at the discretion of the North American FCEs and International FCEs to decide whether their programs will be open to all FCEs.
IV. STEERING COMMITTEE

1. Rotation Schedule
FOCIS Membership Committee staff liaison will provide the Membership Chair with a current Member Society Participation Summary grid (S:\FOCIS Member & Affiliate Societies\Member Society Participation Summary) following every annual meeting for review. The Chair will make a recommendation of three active societies to rotate onto the Steering Committee annually. This recommendation will then be vetted by the Executive Committee final review and approval. (EC: 9/2/11)

V. COMMITTEES

1. Education

Advanced Course in Basic & Clinical Immunology
Speakers are awarded $1,000 honorarium. Speakers and panel discussion participants will be reimbursed up to $1,000 for coach airfare and $200 ground travel expense and provided with complimentary hotel accommodation for the duration of the course; incidental hotel expenses will not be reimbursed. (EC:9/12/05)

Up to two trainees from each FCE are eligible to receive complimentary registration and a $500 travel award reimbursement. (EC:8/15/05)

Up to two trainees from each FCE are eligible to receive a travel grant of up to $600 each or $1,200 if the FCE only nominates one trainee. Travel grant funds can be used to reimburse course registration fees.

Basic Immunology for Clinicians
Speakers receive $2,500 honorarium, coach flight up to $500, reimbursement of expenses.

2. Industry Liaison Committee (ILC)

The Steering Committee agreed that interaction with ILC members at social events is crucial. A suggestion was made to set up a conference call one week prior to Annual Meeting to assign tasks, and allow Steering Committee members to communicate with supporters. (SC:7/18/04)

ILC Members will be asked to judge posters at the Trainee Satellite Symposium (TSS). The poster session will include 2 trainees from each center. ILC members should plan to have 2 representatives attend. (FCE/EC:2/7/04)

VI. ORGANIZATIONAL OPERATIONS

1. FOCIS Record Retention Schedule

   One Year:
   Personnel employment applications
   Routine correspondence of unimportant nature with customers or vendors

   Three Years:
   Bank Reconciliations
   Expired insurance policies
   General correspondence
   Internal audit reports and working papers
Internal reports
Membership applications
Employee personnel records after termination

Seven Years:
Accident reports and claims
Accounts payable and receivable ledgers
Bank statements
Cancelled checks (except under permanent records)
Cancelled stock and bond certificates and expired options
Cash books
Commission records
Contracts and leases (expired)
Employee personnel records after termination
Employment tax reports
Expense reports
General journals
Inventory records
Invoices to customers and from vendors
Payroll records and summaries, including payment to pensioners
Retirement Plan accounting records (to correspond with returns and reports
Sales records
Stock and bond certificates (cancelled)
Subsidiary ledgers to the general ledger and trial balances

Permanent Records
Articles of Incorporation
Audit reports of CPAs
Cancelled checks for important payments, i.e. taxes, special contracts, etc. (checks should be filed with the papers pertaining to the underlying transaction)
Capital stock and bond records: ledger, transfer registers, stubs showing issues, record of interest coupons, options, etc.
Cash books
Chart of accounts
Copyrights
Correspondence (legal and important matters only)
Deeds, mortgages, and bills of sales, as well as contracts and leases still in effect
Depreciation schedules
Financial statements – end of year (other months optional)
General and private ledgers
Insurance records, current accident reports, claims policies
Licenses and permits
Minute books of directors and stockholders, including by-laws and charter
Property records – including costs, depreciation reserves, and end-of-year trial balances, depreciation schedules, blueprints and plans
Tax returns and worksheets, documents relating to determination of income tax liability
Trademark registrations

2. Project Management Guidelines
The five steps of project management within FOCIS are: 1) Initiate; 2) Plan; 3) Execute; 4) Monitor & Control; 5) Close. A Project Charter is required to initiate new FOCIS projects. It is recommended that this Charter include:
Project planning includes schedule development, resource planning, cost budgeting, scope planning and sometimes: staff acquisition.

3. Email Communication Guidelines
   - All external e-mails: Copy Executive Director
   - Annual Meeting related: Copy Meeting Manager also
   - Exhibit related: Copy Meeting Manager and/or Exhibit Manager
   - To anyone on FOCIS Executive Cmte or Steering Cmte: Prior approval by Executive Director
   - Member Societies: Copy appropriate staff liaison also (Meetings & Membership Manager)
   - FOCIS Website: Copy Program Manager also
   - To Steering Committee representatives: Copy chief staff executive of Member Society & FOCIS Membership Manager

4. Work Requests
   Executive Director to sign-off on all information technology, graphic design and print projects

5. Travel Vouchers
   Executive Director to sign-off on all travel requests prior to booking for airfare and hotel accommodations as well as cash advances.

6. Written Correspondence, Promotional Materials
   Anything that is sent from FOCIS must be reviewed by a minimum of one other staff member. If it is going out with a board member’s signature, Executive Director must review prior to sending. Printed pieces should be reviewed by a minimum of two proofers/editors plus Executive Director.

7. Proposals
   Executive Director is to review all proposals for funding prior to sending.

8. Contracts
   Executive Director is the primary signature on all contracts.

9. FOCIS Mailing List
   Upon request, Member Societies may obtain access to the FOCIS mailing list for the promotion of individual society meetings. Access will be restricted to use one time annually for the promotion of a scientific meeting only. All requests must be received in writing with a sample of the intended mailing. The FOCIS Program Committee Chairs will review all materials prior to approval. Unauthorized use of the FOCIS mailing list is prohibited.

9. YM Database Backup
   The FOCIS YM membership database will be backed up monthly by the membership/marketing team member. Nine (9) queries are to be run to extract the data. The resulting Excel spreadsheets should be filed in S:\Database\2016. Refer to Acumen’s YM P& P for detailed procedures.

10. Website Backup
    The FOCIS website will be backed up quarterly by the membership/marketing team member. The backup files should be filed in S:\Website/Website Backups/Year/Month. Refer to the appendix for detailed procedures.
VI. FOCIS STYLE-GUIDE

Audio/Visual Guide for Presenters
FOCIS 2012
June 1-5, 2006

Document Heading:
- Logo in top-right corner
- Vertical line before document title
- Document title: Arial Narrow 14 pt.

1. Set-Up
- ONLY COMPUTER PRESENTATIONS WILL BE ALLOWED
- THERE WILL BE NO ACCOMMODATIONS AVAILABLE FOR SLIDE PRESENTATIONS
- All speakers are required to bring their presentation on a CD-ROM or USB drive to pre-load their presentations in the Speaker Ready Room at least 24 hours prior to their session.
- All program rooms will be equipped with:
  LCD Projector  Computer  Laser Pointer  Podium  Microphone

2. Computer Presentation Guidelines
- Computer presentations must be in PowerPoint for Windows or Mac, on a USB drive or CD-ROM
- Computer presentations must be turned in to the Speaker Ready Room 24 hours before your presentation.

3. Technical Requirements for PowerPoint Presentations
- Be certain that your slides are formatted for electronic projection. To do so, click “FILE” on the menu bar, then “Page Setup”, slides sized for “On-Screen Show.” You may have to resize the content of your PowerPoint presentation to fit the new screen format.
- When naming your PowerPoint presentation, use only Western alphanumeric characters. Do not use any characters that incorporate a dash, dot or backslash, etc. as part of the character, for example à or à, or / or \, or – or .
- Place all audio and video clips linked with the PowerPoint presentation into a SINGLE FILE FOLDER. Video files should be AVI QuickTime or MPEG1, not MPEG2.
- Bring all media on PC or Mac formatted CD-ROMs or USB drives. Also, please use CD-ROMs, not CD-RW.
- If a presentation uses fonts other than the basic Windows fonts (Arial, Times New Roman, etc.) please copy these fonts in a folder along with the presentation. You will find these fonts located at C:\Windows\Fonts. (The fonts will have .tff as their file extension.)
- You must bring your presentation to the Speaker Ready room the day before you are to give your presentation. Lead time is required to integrate all of the presentations into the system.
- Bring your own laptop computer (PC or Mac) if you wish to practice in the Speaker Ready Room. Staff computers will not be available.
FOCIS Bulk-Mailing Indicia Style
When mailing a piece using bulk mailing, an indicia should be printed in the top-left corner of the piece as follows:

** If physically depositing funds into the bulk mailing account please visit the following bulk mailing unit office at: 5995 N. Teutonia Avenue.

VII. CRISIS MANAGEMENT

Store mandatory documents and significant files on 2 jump drives to be stored off-site by the executive director and by the president. Revise jump drive every year-end.