



For the Complete Technology & Database Professional

IOUG AFFILIATE Letter of Understanding

This letter officially acknowledges the affiliation and relationship between a Regional User Group or Special Interest Group and IOUG. It preserves the AFFILIATE's independence, and provides the basis of a mutually beneficial relationship for the purpose of communication, support and membership growth. Overall, it represents the importance and value of AFFILIATES that provide a foundation and local representation of the greater Independent Oracle User Group Technology Community.

*Please see the included list of benefits

IOUG AFFILIATE LETTER OF UNDERSTANDING

This Letter of Understanding is made this _____ day of _____, 20____ by and between IOUG, a nonprofit corporation incorporated under the laws of the state of Illinois, USA, and _____, a nonprofit group, and meeting the governance and guidelines outlined by IOUG for AFFILIATES.

RECITALS

1. IOUG, otherwise known as The Independent Oracle Users Group, is an independent association whose members are users of Oracle technology.
2. AFFILIATES consist of members with a common interest in Oracle technology.
3. AFFILIATE wishes to formalize its relationship with the IOUG and participate in its benefits.

THEREFORE, in consideration of these recitals, and the mutual promises and considerations which follow, AFFILIATES and the IOUG agree as follows.

A. TERMS OF AGREEMENT

1. The IOUG and AFFILIATE sign an *IOUG AFFILIATE Letter of Understanding*.
2. AFFILIATE posts IOUG logo and link to IOUG web site on AFFILIATE web site and promote IOUG events.
3. AFFILIATE appoints a Director/or equivalent to attend annual AFFILIATE business meeting/luncheon to represent the group's best interests and communicate local needs.
4. AFFILIATE annually updates the AFFILIATE Contact Update Form.
5. AFFILIATE submits a brief, one page quarterly summary of activities to facilitate communication to the broader IOUG community.

B. PRIVILEGES OF AFFILIATED GROUP

1. AFFILIATE has right to participate and receive IOUG services and benefits, including free web hosting, event insurance coverage, and promotional support. (Exhibit A)
2. AFFILIATE may obtain limited administrative and organizational assistance from IOUG, such as email blasts to IOUG members. (Exhibit A) Additional back-office services may be available by request and agreed upon fee schedule.
3. AFFILIATE has the right, and is encouraged to, sponsor conferences, meetings, seminars, and other educational and technical meetings that relate to Oracle users in its area. AFFILIATE can request help from IOUG to assist local efforts and to provide outreach to Oracle liaisons.
4. IOUG reserves right to offer additional incentives on a trial basis, to an individual or set of AFFILIATES, but not obligated to offer to all AFFILIATES.
5. On quarterly conference call, AFFILIATES have right to make new benefits recommendations. At least annually, AFFILIATE recommendations will be reviewed at annual business meeting, with AFFILIATE representatives prioritizing and making a recommendation for new benefits to the IOUG Board of Directors.
6. Benefits are subject to change.

C. OTHER PROVISIONS

1. AFFILIATE should adopt its own bylaws and a code of conduct to provide for the administration and regulation of its internal affairs, which shall not materially conflict with the bylaws of the IOUG.

2. AFFILIATE to not make any representations regarding policies or positions of the IOUG except in conformance with written policy statements duly adopted by the IOUG.
3. AFFILIATE is asked to encourage local members to become participants with the IOUG (AFFILIATE rebate program; support outreach to members regarding IOUG programs and services).
4. IOUG and the AFFILIATE will share mutual confidentiality of information with the provision that the IOUG can use AFFILIATE membership information for IOUG related business. IOUG will not distribute or expose the AFFILIATE's membership information to any other organization, vendor, customer etc.
5. The IOUG reserves the right to add amendments to clearly define any issues where clarity is needed.

D. MUTUAL OPTION OF WITHDRAWAL

1. Either party may withdraw from relationship if the spirit of such relationship is not honored. It is recommended that the President of such AFFILIATE and the Executive Board of IOUG discuss the issues to attempt resolution prior to withdrawal. Upon termination of this Letter of Understanding, AFFILIATE must release all use of names: IOUG, Independent Oracle Users Group, and/or IOUG Regional User Group or Special Interest Group (AFFILIATE).

IN WITNESS WHEREOF, the parties hereto have caused this Letter of Understanding to be executed by their officers and/or steering committee effective as of the day and year first written above.

IOUG

By: _____

Title: _____

Date: _____

AFFILIATE

By: _____

Title: _____

Date: _____

Please mail or email a completed copy to:

IOUG

Attn: Kim Wiatr

330 N Wabash Ave. Ste. 2000

Chicago, IL 60611

Email: kwiatr@ioug.org

EXHIBIT A

1. **FREE Web Site Hosting:** IOUG can host your website on our website platform, Socious. This community contains features that support membership, events, blogs, forums, file libraries, wikis and more. This is currently a free hosting service and IOUG will train you on how to maintain your website. All updates and content is at the responsibility at the Regional User Group. Please note anyone wishing to join into your community must sign-up for a free or paid IOUG membership to participate. IOUG can run a demo of this hosting upon request. Migration typically takes 3-6 weeks depending on the amount of content and features.
2. **Event Insurance Coverage:** The IOUG provides your user groups with general liability insurance coverage for your local events. To obtain coverage, fax or email a copy of your vendor contract (the IOUG reviews the exact insurance requirements, the indemnification agreement, actual name of the group hosting the function, and the dates of the event), who the certificate of coverage should be made out to, and the mailing address to the IOUG Headquarters. The IOUG will then work with our insurance agent to provide an insurance certificate. This benefit eliminates the worries, liabilities and complexity associated with trying to independently secure insurance and focus on better meetings and membership growth.
3. **IOUG Reciprocating Membership for Your Members:** The IOUG will automatically sign up the members of your regional user group or special interest group for a free IOUG Associate Membership. As Associate members, your members receive associate access to the IOUG website, twice monthly E-Newsletter, *Five Minute Briefing: Oracle* and various benefits as determined. As new members sign up in your region, you forward your membership lists to the IOUG. The IOUG then takes care of all of the associate sign up and sends a community welcome letter. This benefit relieves you of the burden of communication and complexity of bookkeeping to deal with co-membership applications. Again, your AFFILIATE is able to focus energy on better meetings and membership growth. *(Note: Any member contact information will remain confidential and will not be shared with anyone, is intended for IOUG communications and of course members can choose to opt out at any time.)*
4. **Host User Group Meeting at IOUG Event:** This meeting package enables user group members to participate in educational sessions, an onsite business meeting and the welcome reception in the exhibit hall. If more than five members register for the User Group Meeting Package, they receive eligibility for discounts being offered. This benefit eases the financial burden of attending the IOUG annual event (COLLABORATE) and eliminates the headache of your group having to independently plan a business meeting, allowing your group to focus on the meeting content on membership growth.
5. **Promotional Support:** The IOUG sends AFFILIATE's meeting announcements to IOUG members in your region and your group will be listed on the IOUG User Group web page. This benefit makes available to your group a larger market place to attract new members and grow your membership.
6. **Calendar of Events on IOUG Web Site:** Share your meeting information with the entire Oracle Community! The IOUG posts your user group events on the calendar of events on the IOUG web site, as well as shares this information with Oracle to be posted on the Oracle online master calendar. This benefit provides your group meetings additional advertisement to larger community adding to the opportunity for membership growth.
7. **Year-round Access to Speakers Bureau:** All AFFILIATEs have the ability to search the IOUG speaker database, which houses hundreds of potential speakers who have presented at previous IOUG events, to find the perfect speaker for your next user group meeting! This benefit saves you the time of having to independently search for speakers, while ensuring quality speakers allowing you to conduct a better meeting.
8. **Chapter Auto-Enroll:** Want to grow your user group membership? The AFFILIATE Auto Enroll Program connects new IOUG members with the regional group or special interest group in their

area. At membership initiation, IOUG members may choose to sign up for participation in their regional user group or special interest group. Those interested will have their information sent directly to the user group main contact in their region. This benefit assists your group in growing membership and saves you time and energy spent trying to find new member leads by placing them right into your lap.

9. **AFFILIATE Promo Kit:** Annually, each AFFILIATE will receive, upon request, a kit of IOUG products which may include: *Select Journals*, COLLABORATE Proceedings, giveaways etc. This benefit provides your group with a wider variety of materials for your meetings increasing the value of your event.
10. **Conference Call and Meeting Minutes:** The IOUG documents and distributes minutes from the user group leaders' conference calls and the business meeting/luncheon at the IOUG symposium. This benefit updates your group on the happenings of the AFFILIATE program, the IOUG, and Oracle Corporation for you to use in your membership recruiting efforts.
11. **Oracle Liaison Program and Direct line to IOUG Leadership:** Need assistance? Have a question? The IOUG provides its users groups with a bridge to Oracle through the Oracle Liaison Program. Each users group has an Oracle representative designated to work directly with their group. The IOUG also provides access to the IOUG Director of Community Engagement, Michelle Kolbe, mkolbe@ioug.org, and IOUG staff contact, Kim Wiatr, kwiatr@ioug.org. This benefit saves you the time of having to independently locate Oracle and IOUG contacts allowing you to focus on better meetings and membership growth. This program also provides you with the direct access to Oracle resources through the North American Sales Channel and other Oracle product management resources.