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NON - CIRCULATING
CONSULTEUR SUR PLACE

ORGANIZING THE SUMMIT

Prepared for
EXTERNAL AFFAIRS
AND INTERNATIONAL TRADE CANADA

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NON - CIRCULATING
CONSULIER SUR PLACE

ORGANIZING
THE
SUMMIT

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PREFACE

In the space of ten months the government of Canada hosted three major international summits: the **Sommet de la francophonie** in Quebec City, September 3 - 5, 1987; the **Commonwealth Heads of Government Meeting** in Vancouver, October 13 - 17, 1987; and the **Economic Summit** in Toronto, June 19 - 21, 1988.

In order to organize these three major events, involving approximately 100 countries, the Department of External Affairs established one office, the **Summits Management Office (SMO)** in Ottawa, in September 1986. This concept of one office to organize all three prevented much duplication of effort, built experience and ensured the most efficient use of resources.

From the experienced staff of the Summits Management Office, Canada has been able to develop and maintain an inventory of persons with summits expertise across the range of associated disciplines. In February of 1990, Canada was able to organize, in record time, a fourth major international meeting, the **Open Skies Conference**, by calling on this inventory.

With the organizational success of all four events broadly acknowledged internationally, there have been requests made to the government of Canada by future hosts for advice on how to go about organizing a summit.

It was because of these requests that I, as a "retired" SMO staffer, was asked to undertake the preparation of this handbook on hosting summit meetings. I was asked to review the reports prepared by the organizers of the three summits and the Open Skies Conference, pull out the common elements of organizational detail and lessons learned, and put them into a simple format which future hosts could use in developing their own basic plans and approaches.

There are fifteen people whom I wish to acknowledge. These people were all part of the experienced team from the Summits Management Office, many of whom have continued to gain further expertise and credit in the field of "summit organization".

Len Edwards, the Executive Director for Commonwealth Heads of Government Meeting in Vancouver and the Economic Summit in Toronto, was responsible for my writing this handbook in the first place. To him I owe a great deal of thanks for suggestions, advice, editing skills and friendship.

The other members of the team whom I would like to acknowledge are Fred Doucet, Bill van Staaldouin, Guy Savard, Lucien Proulx, John Schram, Gail Flitton, Don Dixon, Gilles Favreau, John Moodie, Gary Henderson, Joan Walters, Brian Barrett, Daniel Marchand and Sam Samaddar. All of these people have contributed to this handbook, either indirectly through their final reports, or directly, through interviews with me for this book. I owe them all many thanks.

I would also like to say a final thanks to all members of the Summits Management Office for making the three Summits such "logistical successes". Without a doubt, it was because of their expertise and dedication that I was asked to write this handbook for future organizers.

Mary McNeil
Vancouver, B.C.
October, 1990

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INTRODUCTION

INTRODUCTION

The organization of a major international summit is a monumental task. The summit will reflect well upon the host country, but only if it is a success. While success will be primarily measured by what is achieved substantively, it will also be determined by the quality of the logistical organization.

The objective of summit organizer is to set the best possible physical environment for the meeting, to ensure that all arrangements provide a comfortable, fully supportive setting for the pursuit of the substantive work.

It is the intent of this handbook to give to future hosts the basic elements of organizational detail in as simple a format as possible. It is impossible to design a logistical organization which will perfectly for all summits. Therefore, it must be understood from the start that the suggestions and recommendations in this book are only that. The future host should use the information contained in this handbook as a source of information and experience, and not as the "bible" for their summit.

From the experience gained from hosting four major meetings, it is possible to assemble the generic organizational details common to all four and present them in the following pages. Each summit offered its fresh challenges - new location, different participants, and a unique set of guidelines and organizational precedents - but the tasks to be done were the same. These tasks are outlined in the following chapters.

The handbook assumes the "worst case scenario": a major international summit, in a location out of the capital region, in a major urban setting, with more than one principal participant (VIP) requiring top security protection, with a lead-time of approximately one year.

If the summit to be organized is a "worst case scenario" then the host must seriously consider every chapter and its contents. It is very easy to assume that some of the logistical details/problems will naturally "just happen", or perhaps, "never happen". However, the success of the four events organized by the Summits Management Office in Canada, was only possible because of this detailed planning.

THE BASICS



ORGANIZING THE TASK FORCE

One of the first and most important requirements to be met in developing the organizational structure for the management of an international summit is to make sure that the **Organizing Task Force** has easy accessibility to the office of the Prime Minister or President (or the host Minister's office, in the case of ministerial conferences).

The **Executive Director** of the Organizing Task Force will require an effective mechanism for regularly consulting with the key political players associated with the summit and its location. It is essential that the summit organizers have a regular and reliable method of seeking and receiving guidance from the political level on the host's wishes, and getting help in liaison with other ministerial offices. The organizing of a major international summit usually operates under serious time constraints, and the Organizing Task Force can not afford to go through a rigid bureaucratic line of command.

The **Organizing Task Force** should exist separate from and parallel to the organization responsible for substantive preparations. Regular meetings between the two organizations in a committee chaired by representatives from the host's office should ensure the necessary close communication and coordination. Participation by the Executive Director in the regular meetings of this committee also serves as an effective supplemental mechanism for contact with the political level.

THE SUMMIT OFFICE:

The organization structure for the **Organizing Task Force** will naturally vary from summit to summit, and will be dependent upon the size (number of participants), importance and the lead time available for preparations.

The creation of one organization to prepare two or more summits will avoid duplication of effort, eliminate inconsistencies and build on experience. It maximizes effectiveness and promotes excellence, although these summits should be a minimum of six months apart if the same personnel are to play a full part in each and thus apply experience from the first summit to the second.

Governments and organizations responsible for hosting meetings would be wise to develop an inventory of experienced international conference planners and re-use them regularly. Although the Summits Management Office (SMO) was no longer in existence in the fall of 1989, the Canadian government was able to hire many experienced personnel from SMO to work on the **Open Skies Conference** held in Ottawa in February 1990.

EXECUTIVE OFFICE:

The Executive Office for the Organizing Task Force should have one senior manager, the Executive Director, responsible for all arrangements, including accountability for budget. The Executive Director should have the personal assistant(s) necessary to manage and communicate effectively with a large and complex organization.

In order to strengthen the horizontal management capabilities of the Executive Office, particularly in the planning area and in programme management, it is recommended that a senior manager position for Plans and Programmes be included within the Executive Office. He/she should not have line responsibilities, but should be someone clearly perceived as being, if not the second-in-command, then at least the equivalent of the line directors.

The Plans and Programmes unit is dealt with in further detail in the chapter on "Developing the Official Programme".

In addition, the Executive Office should also include a Public Affairs and Media Relations unit responsible for directing and overseeing the development and delivery of a coordinated communications plan and information package. Three other individuals should be recruited:

- i. a Media Spokesperson, to oversee and advise upon media relations and deal directly with the media. (This might be covered off by the head of the unit, or by the public relations manager depending on skill and knowledge of the local media.)
- ii. a senior editor to handle writing assignments, to manage the publications unit and to ensure that "content" and "look" conform to the communications plan, and
- iii. a public relations manager, to develop and oversee the communications plan, which includes putting together a visual package (logo, folders, letter head, posters, etc.).

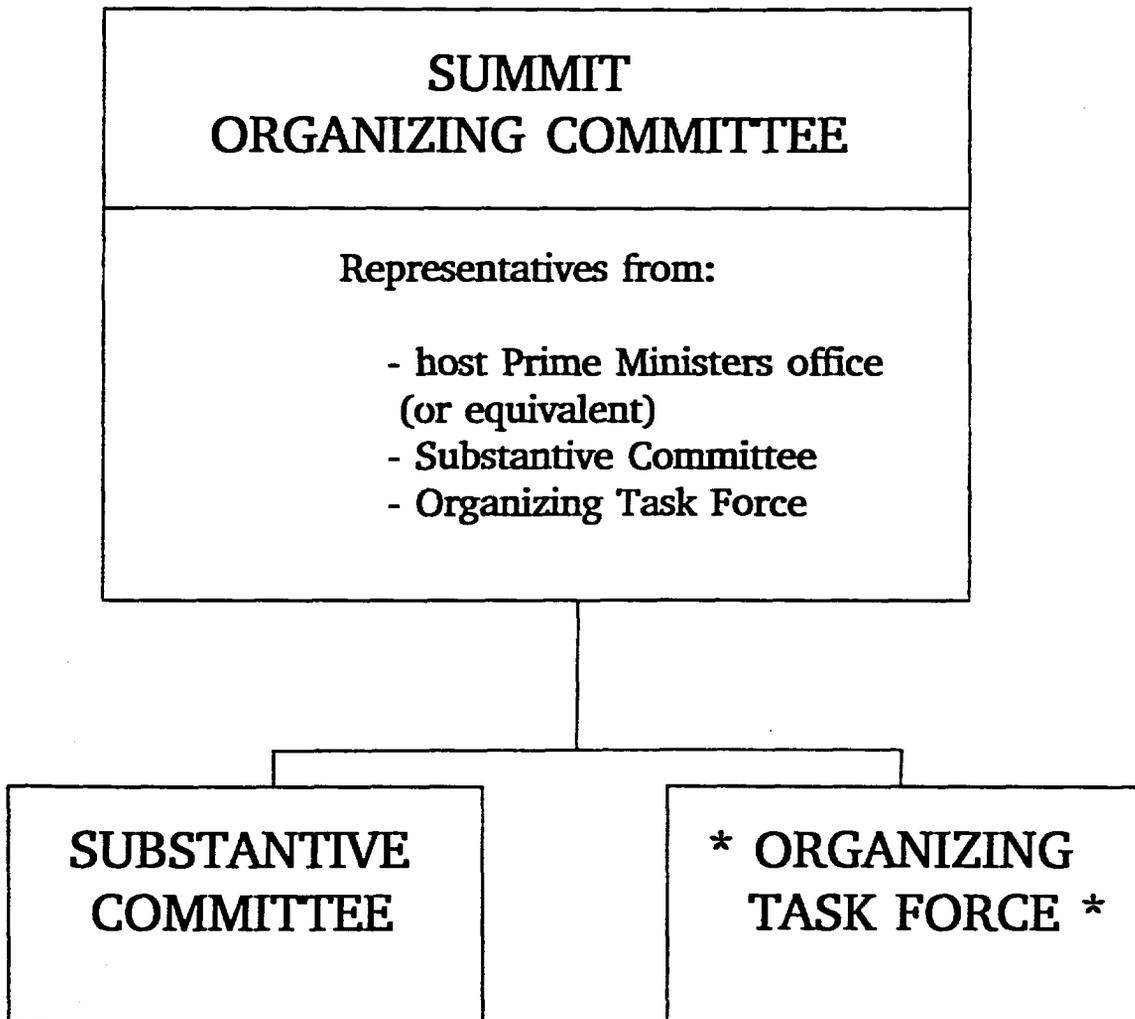
This function is further discussed in the chapter on "Public Affairs and Media Relations".

THE DIRECTORS:

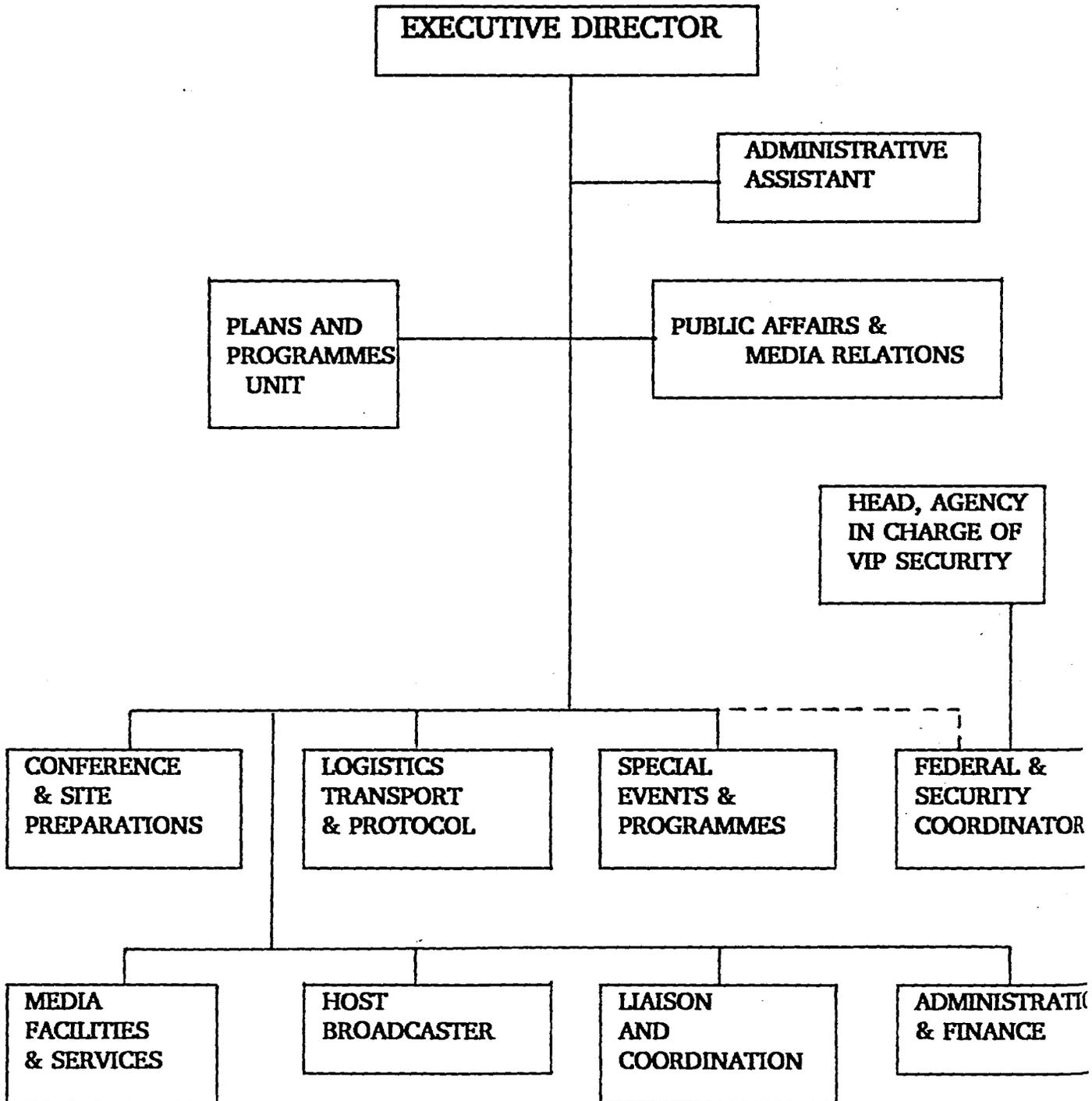
Reporting to the Executive Director are the line Directors, each responsible for a different division of the organization, and whose responsibilities include accountability for

the budget for their division. The following chapter deals with each division, its mandate and responsibilities, and sets out a suggested organization structure.

Regular (weekly) Directors' meetings should be called by the Executive Director to allow for on-going coordination and communication between the divisions, and to function as a decision-making forum, where those responsible for follow-up are identified and deadlines set and monitored. When organizing a major conference many of the logistical requirements overlap divisional boundaries. Even those elements that do not overlap, can and do impact upon the preparations of other divisions.



*** ORGANIZING TASK FORCE ***



DIVISIONS

Based on the experience gained from hosting three major summits, this handbook recommends the following separate line divisions be established within the Summits office:

1. Conference and Site Preparations
2. Logistics, Transport and Protocol
3. Liaison and Coordination
4. Security
5. Media Facilities and Services
6. Host Broadcaster
7. Special Activities and Programmes
8. Administration and Finance

The "Plans and Programmes" and "Public Affairs and Media Relations" units should form part of the Executive Office.

The number of personnel required within each division will obviously vary depending on the nature of the summit, however the number of divisions should remain about the same. A span of control of 8 to 10 is not excessive and prevents an overly heirarchical management structure from developing.

1. CONFERENCE AND SITE PREPARATIONS

Mandate and Responsibilities:

- preparation of all facilities needed for the Summit (including the monitoring and dealing with emerging labour situations)
- preparation and administration of contracts for the construction, preparation, signage and visual enhancement of all facilities
- preparation of detailed floor plans, individual room layouts, and of inventories of furniture and equipment
- conference services; translation, interpretation and printing
- production of move-in/move-out schedules and a site management plan
- hospitality for VIPS and delegates; ensuring that food and beverage service is provided at the various sites
- overseeing the design and delivery of emergency medical plan and health services
- room management planning and operation during the summit
- ceremonial elements - flags and carpets

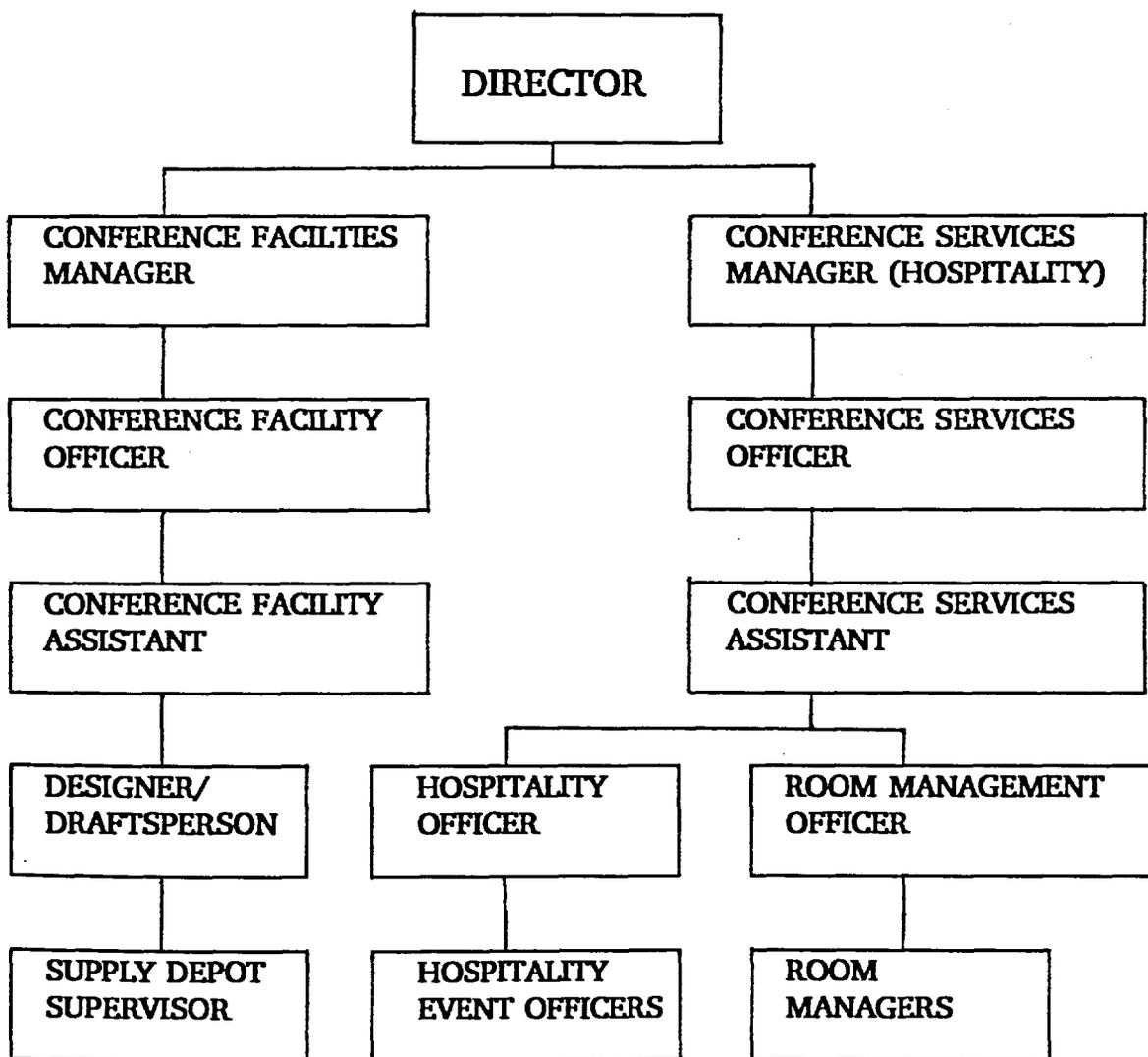
Possible Organization: (see organization chart next page)

The Conference and Site Preparations division can be divided into two major sections: Conference Facilities and Conference Services (including hospitality), each with a manager who reports to the Director of the division. One would be designated as a deputy to the Director.

- i. The Conference Facilities section is responsible for planning, design, and tendering stages of site preparation; conference construction, set-up and tear-down; inventories of furniture and equipment; translation, interpretation and printing facilities; conference supplies and supply depot; electrical, plumbing and cleaning requirements; and signage requirements.

- ii. The Conference Services (hospitality) section is responsible for all food service arrangements at every site; overseeing of hospitality events, setting of menus, arrangements with caterers, budgeting, and liaison with the host (Prime Minister or Ministers') offices; all other delegate/media ancillary services (banking etc); medical arrangements; design and decoration and furnishing of main meeting rooms and VIP offices, including the site enhancement program; room management; ceremonial elements.

CONFERENCE AND SITE PREPARATIONS



2. LOGISTICS, TRANSPORT AND PROTOCOL

Mandate and Responsibilities:

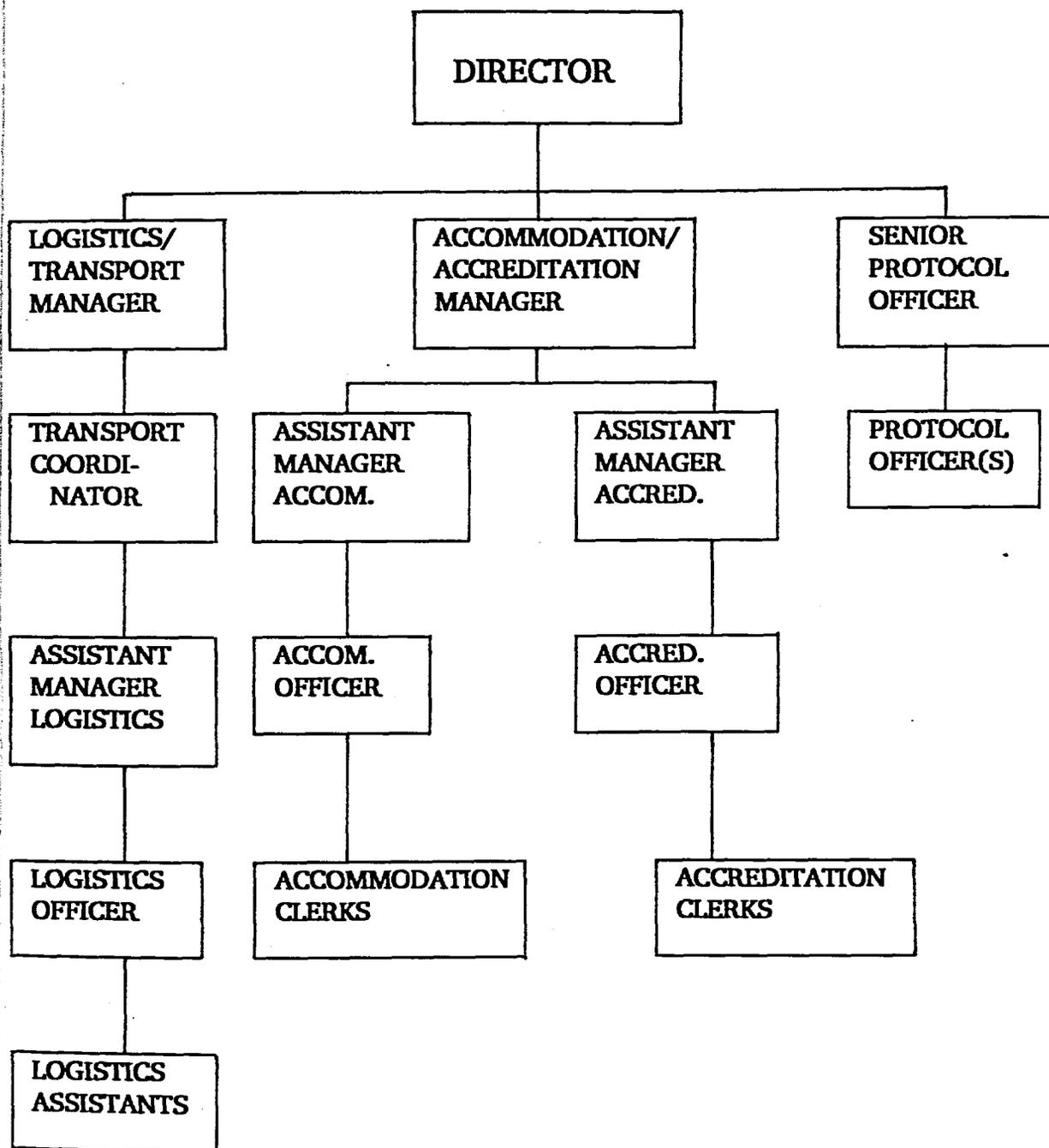
- accommodation for all delegations and staff
- overall coordination of accreditation policy/delivery
- arrivals and departures for VIPS/delegates
- coordination of all transportation arrangements, (working with the security organization)
- protocol arrangements/advice

Possible Organization: (see organization chart on next page)

The Logistics, Transport and Protocol division can be separated into three sections, each headed by a manager who reports to the Director of the Logistics division.

- i. Logistics, (possibly headed by someone who could act as the deputy to the Director), is responsible for the arrivals and departures, coordination of the transportation arrangements and dispatch of delegation/media vehicles and buses, including securing and dispatch of all administrative transport before, during and after the event.
- ii. Accommodation and Accreditation is responsible for the accommodation for all delegations and staff, the accreditation policy and its delivery.
- iii. Protocol section provides protocol advice and assists in handling those parts of the Programme which have protocol components (except hospitality). It is headed by the senior Protocol officer.

LOGISTICS, TRANSPORT AND PROTOCOL



3. LIAISON AND COORDINATION

Mandate and Responsibilities:

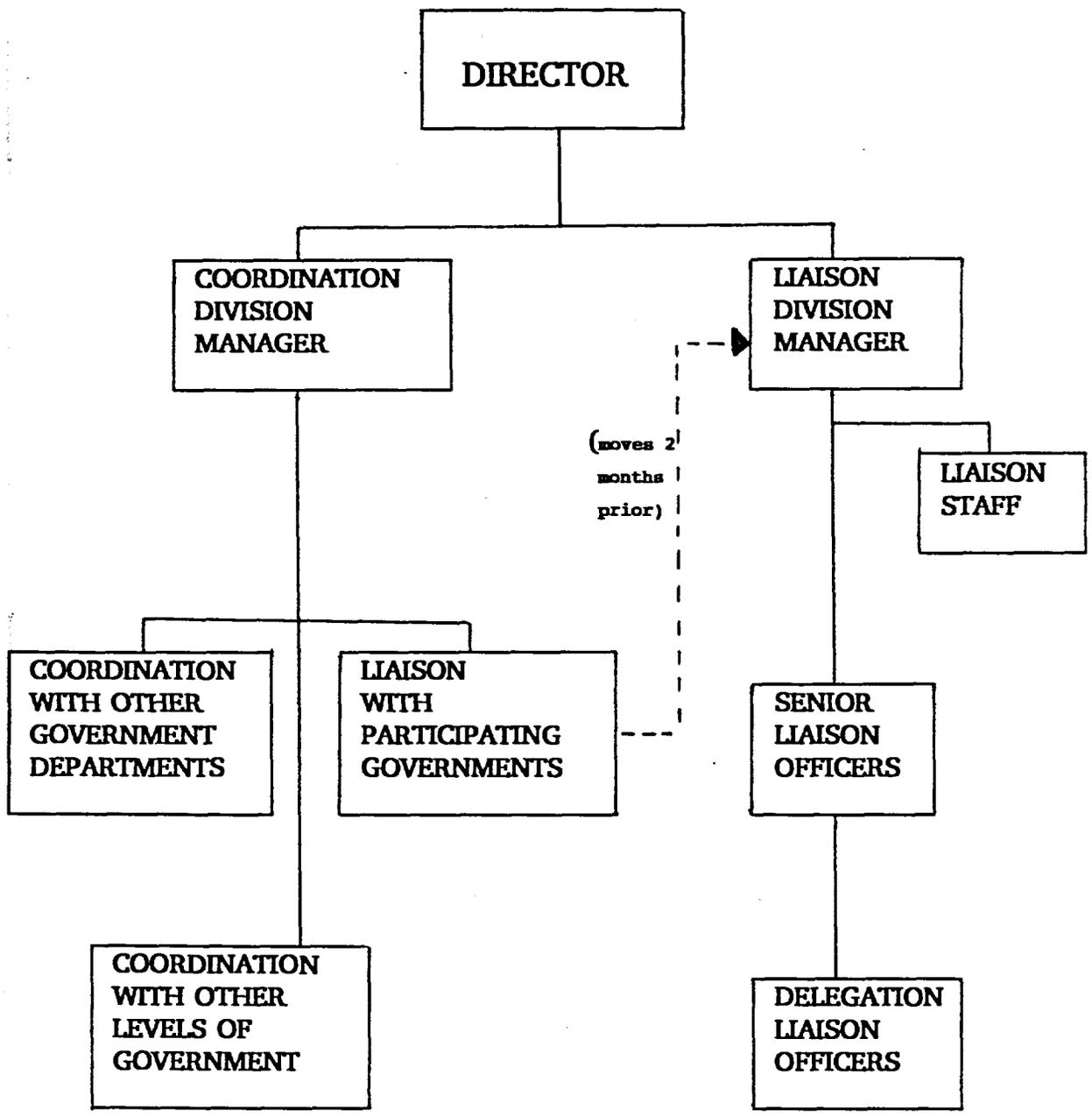
- coordination of relationships/cooperation with other government departments
- coordination of relationships/cooperation with other levels of government
- liaison with participating governments including:
 - preparation of the Aide Memoire, and
 - handling all advance visits
- recruitment and training of liaison officers
- manning liaison desk and communications centre in operations centre

Possible Organization: (see organization chart on next page)

Within the Liaison and Coordination division there is an obvious division between Liaison and Coordination, each headed by a manager, one of whom would be the deputy. If there is long lead-time, the Coordination section will be established first, since it is important that good relationships and cooperation be developed at an early stage between the host organization and other governmental entities, particularly provincial/state and municipal governments in the summit location. The main work load of the Liaison section occurs much later in the preparatory process, and it may make sense to place the liaison function within the Coordination section in the early stages. This combined section would therefore handle coordination with other government departments and levels of government, and initiate the liaison with participating government embassies. Working closely with other sections within the organization, the preparation of the Aide Memoire (see Appendix B) is done by this unit, as well as the handling of all of the first round of advance visits. The initial recruitment of liaison officers will be started within this section.

Later, the senior staff person responsible for liaison would become the manager of the Liaison section when it is established separately and staffed approximately two months prior to the summit. It would be this section's responsibility to prepare the liaison officer programme, to train the officers, to handle the major liaison load in the weeks prior to and during the summit, and to man the liaison officer desk in the Operations centre.

LIAISON AND COORDINATION



4. SECURITY

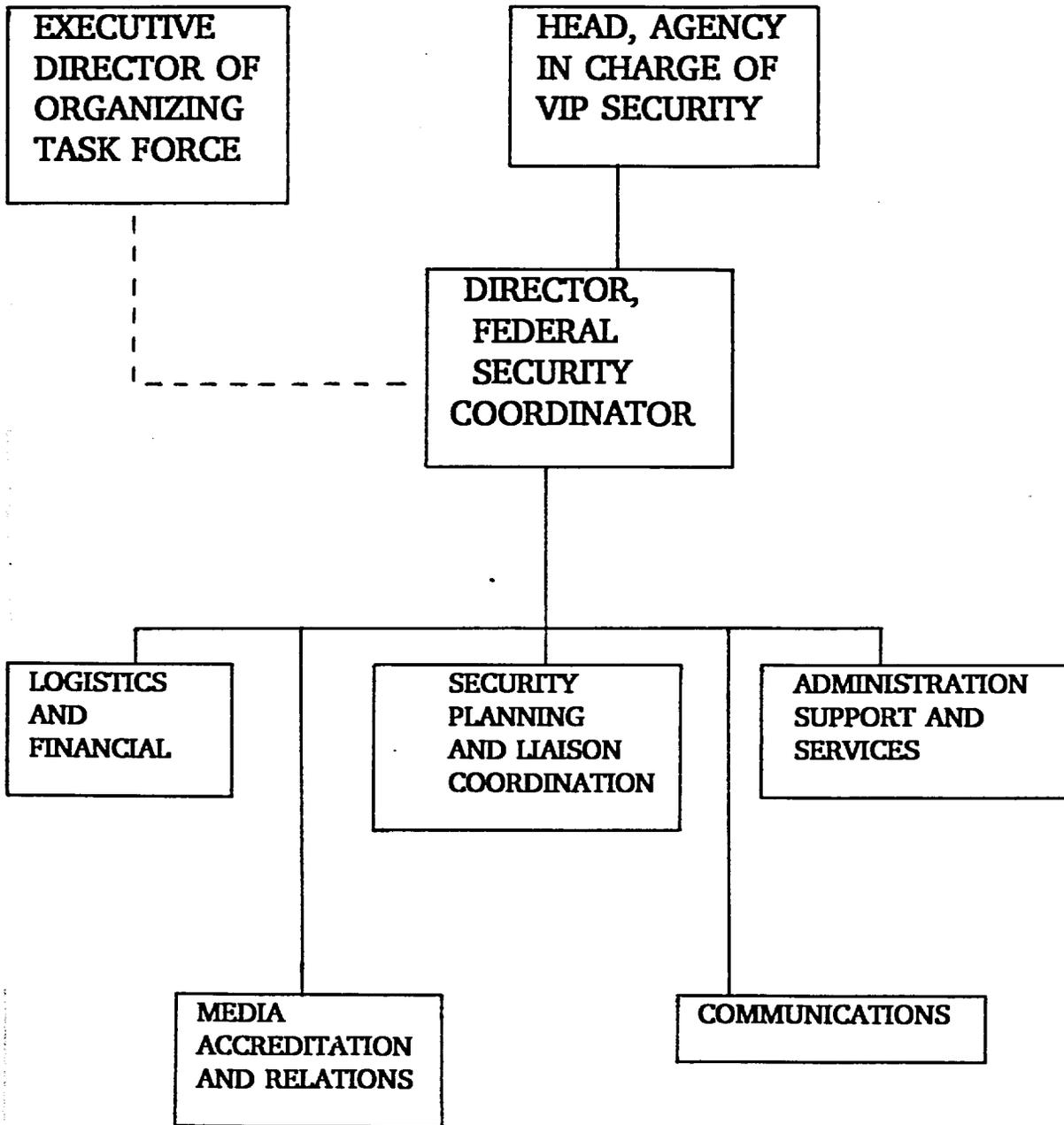
Mandate and Responsibilities:

- the protection of the VIPS, each of whom is assigned armed escort officers for the duration of his/her visit to the country
- the provision of drivers for, and transportation (motorcades) of, protected VIPS
- special security precautions to be taken at the summit
- special security precautions to be taken at all VIP accommodation sites
- special security precautions to be taken at the airport for the arrivals and departures of the VIPS and the protection of the dedicated aircraft during the summit
- special security arrangements for screening of parcels and mail at all sites
- involvement in the accreditation process, working with the Logistics section
- the control of access to all sites
- preparation and implementation of the budget for all security requirements

Possible Organization: (see organization chart on next page)

It is very important that the management of the Security function be fully incorporated into the summit organization, even though the head of this division (called the Federal Security Coordinator in Canadian practice) will probably report directly to the Head of the Agency responsible for VIP Security. The resources used for security during the summit will probably also be under the command of a separate security operations headquarters reporting to the Agency head. The division located within the summit office should contain the necessary management and staff persons for the effective interface with all parts of the summit organization and its detailed preparations.

SECURITY



5. MEDIA FACILITIES AND SERVICES

Mandate and Responsibilities:

- media logistics: arrangements for media access, coverage opportunities, pools and briefings
- media centre: design and management
- media accommodation and accreditation
- transportation for media, working with Logistics
- working with Security on access for, and movements of, the media
- information: written materials and media relations officers

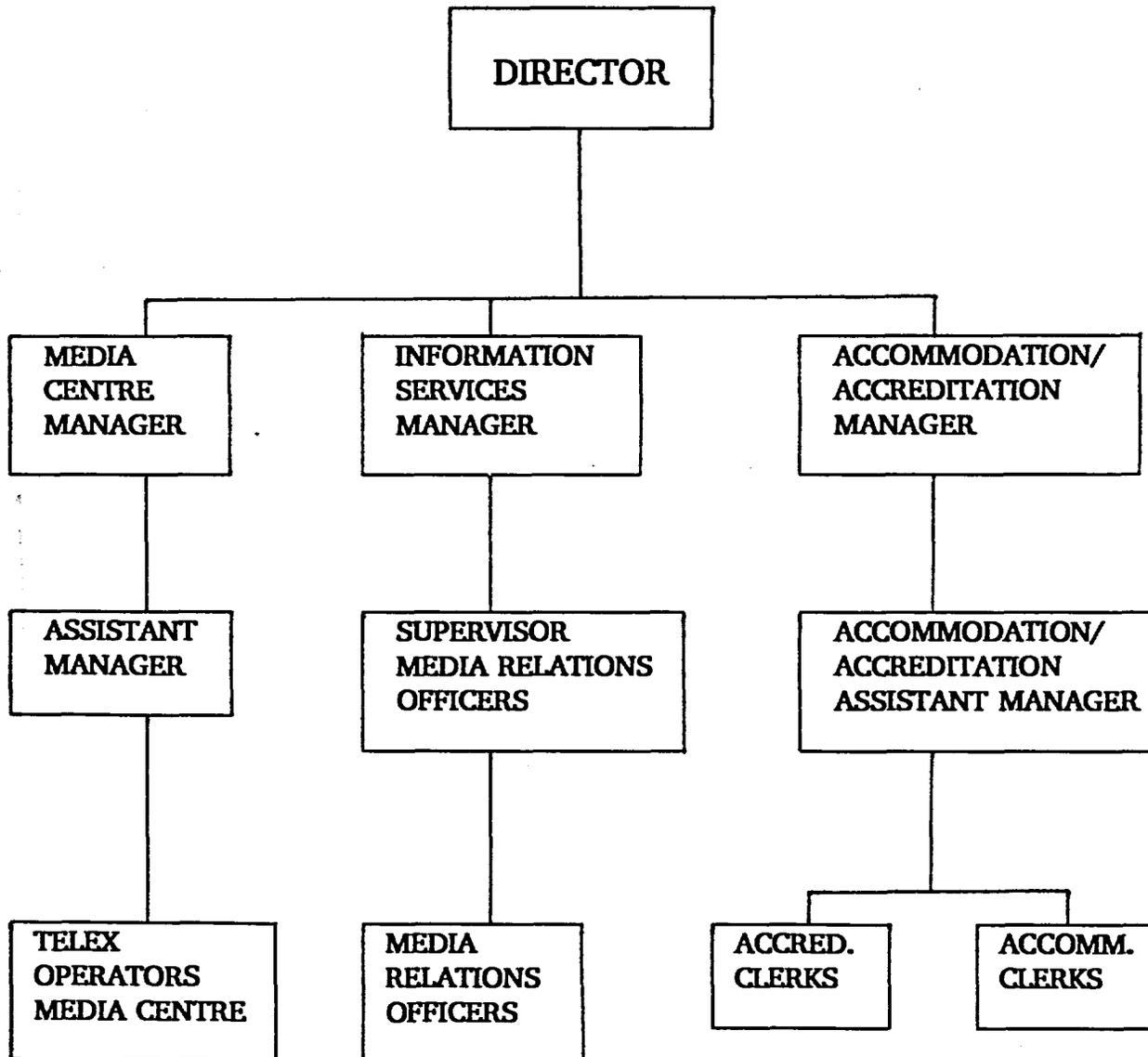
Possible Organization: (see organization chart on next page)

The Media Facilities and Services division can be separated into three sections each headed by its own manager, one of whom should be a designated deputy Director.

- i. Accommodation and Accreditation section is responsible for all media accommodation and accreditation
- ii. the Information Services section is responsible for all written materials, the media relations officers (interviewing, training and scheduling), and the media's logistical requirements
- iii. the Media Centre section is responsible for the design and management of the media centre, working closely with the Conference and Site Preparations division.

While all three sections have specific areas of responsibility independent of the others, they will have to work closely with other sections within the summit organization doing related work.

MEDIA FACILITIES AND SERVICES



6. HOST BROADCASTER

Mandate and Responsibilities:

- provide foreign and domestic broadcasters with high quality, professional facilities to encourage broadest possible coverage of the conference
- provide live feed coverage (pictures and sound) of all open sessions, briefings, press conferences, etc.
- provide ENG crews to cover special events, making the coverage available to foreign broadcasters

Possible Organization:

The position of the Host Broadcaster division in many ways is similar to that of Security. Even though it will probably be a contracted service, its management and main planning staff should be fully incorporated into the summit organization and preparatory activity (it works very closely with the Media division and Conference and Site Preparations division). Most of the resources used at the summit will come from the parent organization.

7. SPECIAL ACTIVITIES AND PROGRAMMES

Mandate and Responsibilities:

- delegates' services
- the spousal programme
- recruitment and assignment of "volunteer programme"
- guest list(s) and invitations for public events
- any other special programmes, outside the Official Programme: (eg. the development of a programme for youth involvement on margins of summit)
- any special summit-related events, (eg. a gala, trade show, presentations)

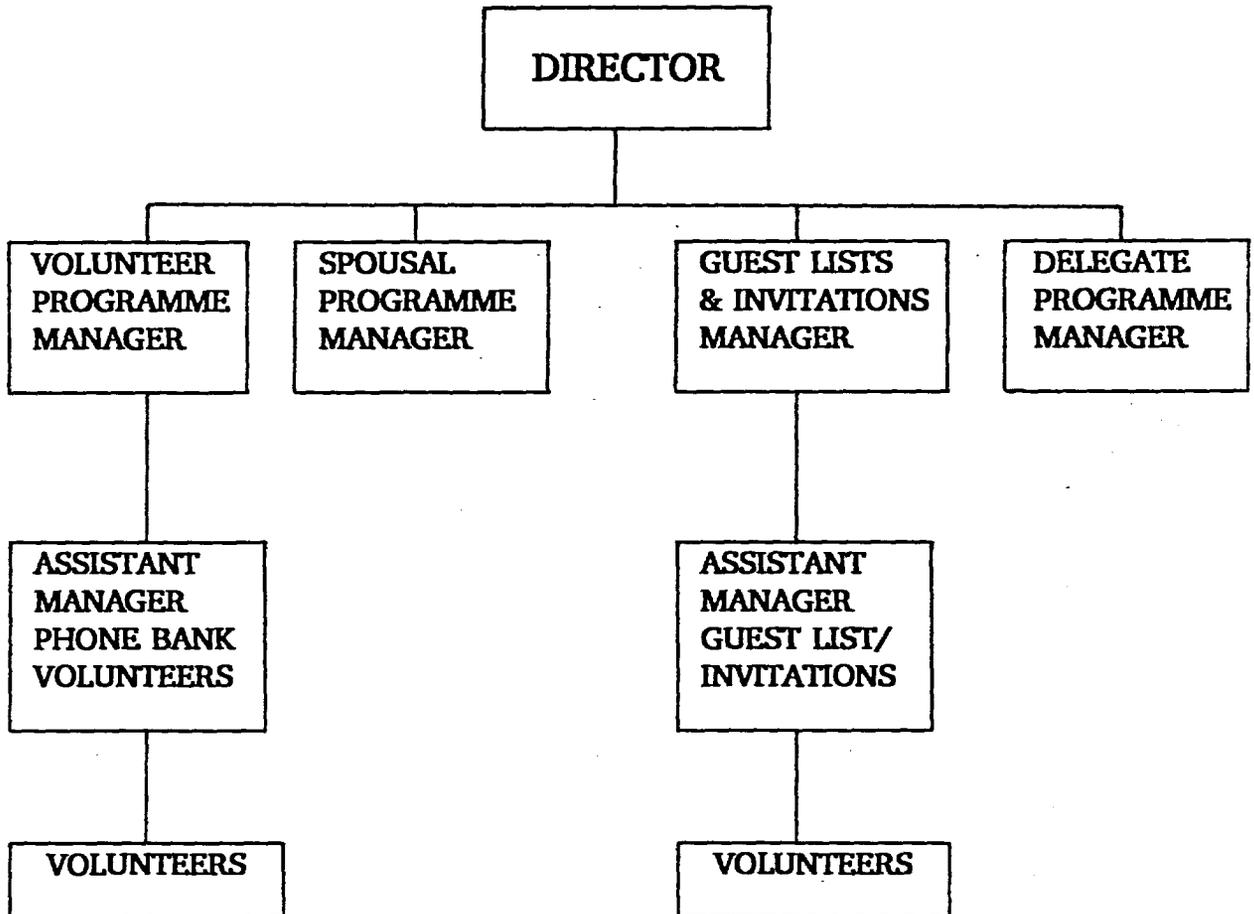
Possible Organization: (see organization chart on next page)

The Special Activities and Programmes division can be separated into four different sections, each with its own manager reporting directly to the Director. One of these managers should be designated the Deputy. An additional section could be added, if a decision is made by the summit host to have any special summit-related events.

- i. the Delegate Services section is responsible for the development and management of delegates' services and (if desired) extra-curricular programme.
- ii. the Spousal Programme section is responsible for the development and management of the spousal programme, including site selection and budget control, working closely with the Plans and Programmes and Finance divisions.
- iii. the Volunteer services section is responsible for the development and management of a programme for the use of volunteers during the summit, working very closely with the staffing division within the Administration and Finance division.

- iv. the Guest List and Invitation section is responsible for the development and management of the guest lists and for the preparation and distribution of all invitations required for elements of the Official Programme open to the public (eg. Official Opening or Closing Sessions), or any special events. (Note: Hospitality staff in Conference Services will handle guest lists/invitations for official events confined to delegates.)

SPECIAL ACTIVITIES AND PROGRAMMES



8. ADMINISTRATION AND FINANCE

Mandate and Responsibilities:

- prepare budget and ensure control of expenditures
- handle all staffing and training requirements
- provide all communication and telecommunication requirements
- manage the official gifts programme
- manage the private sector sponsorship programme
- goods and services procurement
- provide contracting services for the office
- set up, administration and closing down of Task Force office(s), including all related support, security and equipment requirements

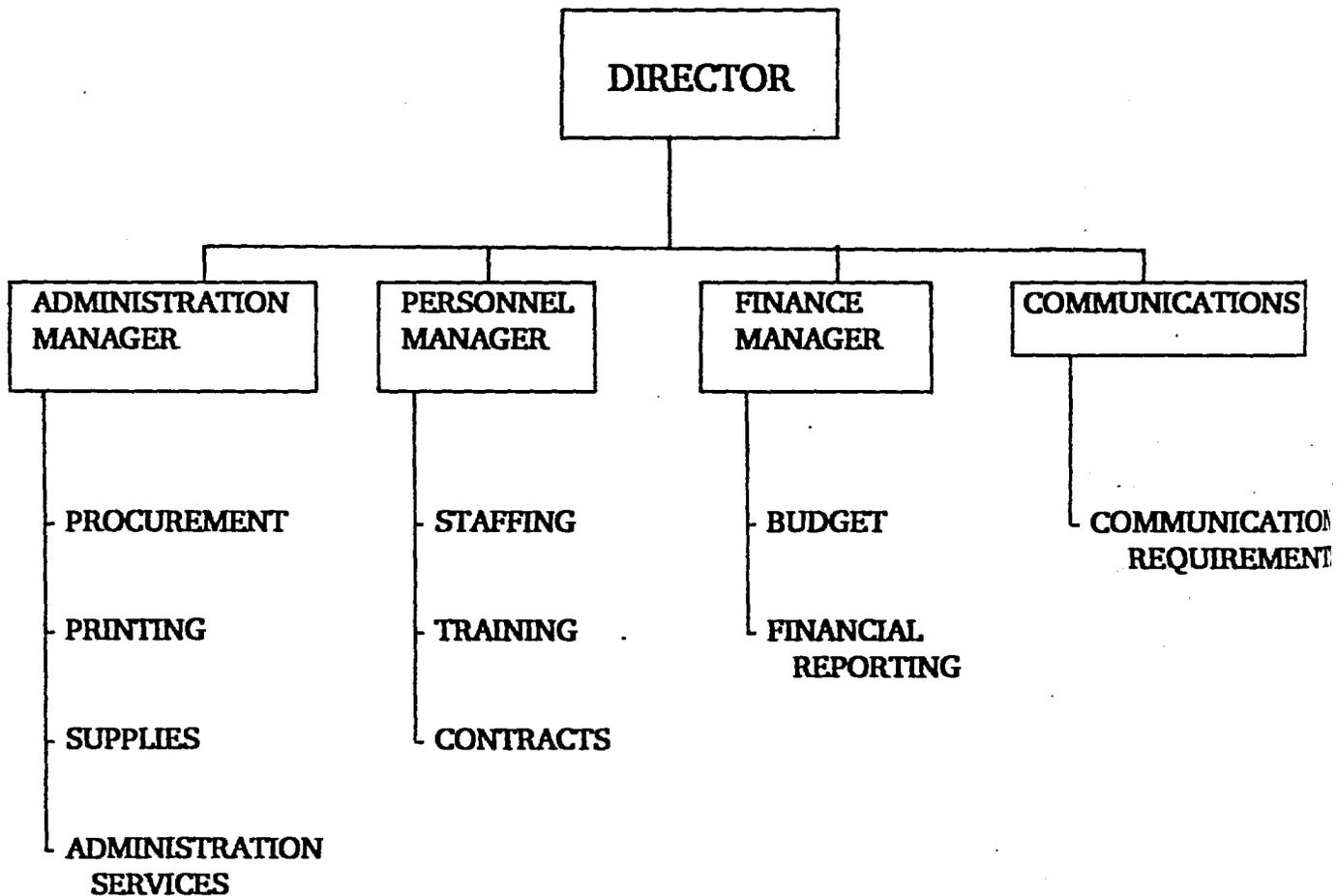
Possible Organization: (see organization chart on next page)

The Finance and Administration division can be organized and staffed as four separate sections, with qualified and experienced staff heading each section. One should be designated as a deputy to the Director. There should be a Finance Officer, on staff at the outset, thoroughly knowledgeable about the host government's financial management systems.

- i. The Administration section is responsible for the procurement, printing, property, supplies, office set-up, and all administrative services, including the management of records.
- ii. The Personnel section is responsible for all staffing and training matters, and for advice and assistance in the drawing up of personal service contracts.

- iii. The **Finance** section to be responsible for budgets, financial payments and reporting, and (working with Personnel) providing advice and assistance on contracting generally and ensuring proper procedures are followed.
- iv. The **Communications** section to be responsible for all communications and telecommunications requirements.

**ADMINISTRATION
AND
FINANCE**



STAFFING

Staff Selection

Finding the right personnel for a project such as a major international summit is as important as it is difficult. Poor staffing creates additional work and frustrations, and can dangerously undermine morale. Unless this is the second or third major conference being organized, with experienced individuals from whom to choose, it is impossible for the Executive Director to be certain that everyone selected on the basis of aptitude alone will meet requirements.

Summit organizers can, and should, cast a wide net for the best people, including loans from other host government departments (especially from their offices in the summit location), and persons from other levels of government (province/ state/ municipal). The principal sources of staff will be non-government contracts with self-employed experts and support from temporary assistance agencies.

Candidates must be very carefully selected for their aptitude for project work of this nature. It is critical that staff be flexible, strong team players, who are well-organized and perform well under pressure.

Acquiring the first-time summit team can be a very difficult and frustrating task, when dealing with the complexity and time-consuming character of most government staffing and contracting rules. Summit organizers must be aware that the bureaucracy can slow down the process. In some instances, there is no "time" available for these delays. This underlines the emphasis that should be placed on early and accurate forecasting of staff requirements.

A conscious effort should be made to hire staff locally if the summit is out of the capital region. Obviously, most of the core staff will come from the capital; however, the large numbers of support staff and site office personnel (if required) should come from the summit city.

The reasons are both budgetary and political. Locally hired staff do not incur travel and temporary accommodation costs; their local knowledge makes them more efficient and effective than out-of-town staff. Local governments will be more helpful, and the general public more supportive, if they know that the summit is making an impact on the job market in their city and bringing economic benefit.

Host governments and organizations might consider developing and maintaining inventories of persons with experience across the range of associated disciplines, including those outside of the government, and ensure that same personnel continue to gain the relevant experience.

Security Clearances

Personnel planning must also take into consideration the need to have persons security cleared prior to taking up their assignments in the organizing office. There are often few such personnel readily available outside the capital region. An advance arrangement with the relevant security agencies to obtain priority treatment for Summit-related clearances, is absolutely essential.

Careful attention must be paid in this regard, to the selection and clearance of temporary help. In the final weeks and days prior to the summit large numbers of people will be brought into the organizational effort. It is critical that a strong relationship exist between the summit office and temporary help agencies to ensure early selection of staff, so that clearances can be obtained well in advance of the summit and prior to the start of the training program.

Training and Orientation

It is important that a coordinated training and orientation program is instituted well ahead of the arrival of the support and liaison staff. Approximately two to three months prior to the summit, an additional staffing assistant and training officer will be required. It will be their responsibility to interview candidates (a lengthy, time-consuming process), and give briefings on the summit and general orientation. Shift schedules will need to be established and the availability of candidates for positions and shifts confirmed.

The training officer will coordinate and prepare all of the training and orientation, and should write a Staff Handbook. This orientation and training will allow for the smooth integration of large numbers of support staff into the organizational force.

The general orientation program for all staff should include a welcome from the Executive Director (on video if he/she is unavailable for all training sessions), and briefings on the office organization, the background for the summit, and the summit Official Programme. All "first-time" personnel should be formally and fully briefed on security requirements.

Specific training programmes will be required for each category of assistants brought on staff: accommodation assistants, logistic assistants, delegation liaison officers, senior liaison officers, and the media relations officers. Those directors giving briefings should be given lots of advance warning about the dates and times of the orientation sessions to ensure their participation.

The Staff Handbook

The Staff Handbook is a valuable information and communications link. The book itself must be carefully planned so that it is informative and educational without being so long that the reader "tunes out".

Volunteers

Volunteers, carefully selected, assigned and briefed on their responsibilities, can make a significant contribution to any summit organization. The use of volunteers brings greater community involvement in these major events, and contributes to cost savings.

The decision to include volunteers in the organization force should be made well in advance. This decision will probably need to involve the political level.

See chapter on "Developing Special Programmes" for details on management of the volunteer programme.

BUDGET

If at all possible, financial allocations for hosting major summits should be determined after the general location (ie. city, resort) for the event is chosen, and after examination of the following factors:

1. the costs of doing business at the event location
2. the dimensions of the event envisaged (how many sites and facilities to be used)
3. costs of inflation
4. security costs (eg. higher in more urban environments)
5. possibility of having to offset "loss-of-business" costs (see below)

A request for summit funding is prepared by the Finance and Administration division and submitted to the government's central funding body (eg. Treasury Board in Canada) by the Executive Director. (In Canadian practice this request would not normally cover security costs, funding for which would be sought separately by the RCMP.)

Once government funding approval is received, it is necessary for each division to prepare a detailed budget proposal which is reviewed by the Executive Director with the help of the Director of Finance and Administration. Divisional budgets are then set, and a central reserve established. (Directors might be given 5% less than they estimate their requirements to be, so as to encourage cost-savings and the seeking of outside assistance.)

The support and contribution of other government departments in providing personnel, services and facilities at reduced or no cost can be a valuable source of budgetary assistance. Directors should identify in each area what these contributions might be and prepare a plan of action for seeking them. A personal appeal from the host head of state or government to the ministers in areas concerned is a key first step in successfully approaching the various departments.

Whether or not the original funding is adequate, other levels of government can and should also be approached to contribute to hosting costs and to providing facilities at reduced or no charge. Organizers are also justified in seeking assistance from the

private sector (see below). Involving the private sector and other governments has potentially large cost-saving features and adds to the perception of a shared "national" endeavour in staging these major events. (See chapter on "Choosing the Setting" for more detail.)

The possibility of having to offset "loss-of-business" costs resulting from restrictions on public access to event sites for security reasons is, unfortunately, very real. The continuing prominence of security factors ensures that such "off-set agreements" will be standard conference-related work in the future.

Managing the Budget:

Managing the initial budget allocations within the office should take fully into account the out-of-capital cost dimension (if it is applicable). As final decisions are made on the main meeting site, and on any auxiliary sites, further adjustments to the divisional budgets must be made. The extent of set-up preparations in particular can greatly affect the financial resources needed.

If there are any sudden major upward adjustments in costs which threaten to surpass allocations, a close and urgent re-examination of funds allocated to each event during the summit should be undertaken. All further financial commitments on preparations should be withheld until a full re-examination has been done. With financial resources limited, the challenge is to find ways to cut costs and engage others in contributing to the effort. Failing that it will be necessary to review basic decisions on sites and other arrangements.

It is the responsibility of **Finance and Administration**, working in turn with each director, to ensure that a system for the tracking and firm control of commitments and expenditures is developed and maintained, with regular reports to the Executive Director.

Controlling the budget is a very important and time-consuming part of the Executive Director's responsibilities. When the speed of events is "normal", each director should have the authority to make the budget decisions and assign their funds within their overall allocations. In the final 2 - 3 weeks, however, the Executive Director should take control of the budget and be the sole authority for approving any new commitments of funds. This is the only way to retain control in the rapidly moving situation, to shift funds quickly among responsibility centres, and generally to prevent last minute spending decisions which could exceed budgetary allocations.

At the outset of preparations, it is necessary that all staff be made conscious of budgetary constraints and procedures. Commitments must be made only with proper approvals of those in charge, and the Finance and Administration division kept informed.

Private Sector Contributions

Private sector contributions (or sponsorships) are more easily pursued on an "in kind" rather than cash basis, and better lend themselves to the forms of recognition which respect the more serious nature of a summit event (eg. discreet signage, mention in the delegates' or media handbooks, other acknowledgements). This approach can cut costs, and showcase local goods and services at the same time.

If private sector contributions are being sought both by the host government, as well as by other levels of government assisting the host government, it is highly recommended that this effort be run as a single operation under the leadership of the host. One set of recognition guidelines should be in place from the beginning, as determined by the host. The summit organizers must make sure that these guidelines are clear to potential sponsors right from the start, are applied consistently to all parties, and do not change.

ADMINISTRATION

Procurement:

The Finance and Administration division is responsible for coordinating the procurement of all goods and services, working with and assisting those divisions concerned. This includes obtaining supplies and office furniture for the Task Force, and the purchase of official gifts for VIPS/delegates (see below). Also, (as a service to Conference and Site Preparations division), Finance and Administration also assists in the completion of contracts for preparation of the conference facilities, completing leasing agreements, and satisfying all on-site equipment and other requirements. These goods and services can be obtained in a variety of ways: loans and rentals, call-ups against standing offers, local purchase orders, and tendering.

When organizing a major international summit within a limited time frame, care must be taken to ensure that the procurement process does not become "paper intensive" and that work is accomplished as quickly as possible. At the same time, special care must be taken to see that all procurement is done in compliance with government requirements. It is recommended that a procurement officer who is fully knowledgeable and experienced be brought on staff at the outset of the planning process.

The establishment of an inventory system is a definite asset in tracking furnishings and equipment purchases (or rentals) from a variety of suppliers, and on loan from other governments or government departments.

Official Gifts Programme:

Normally the host of the summit will have a personal interest in the selection of the official gifts. In consultation with his/her staff, the Administration division selects and purchases acceptable gifts. Discussions concerning the gifts should begin early on in the planning, as this can be a very time-consuming process.

A gift policy should be developed in consultation with the Protocol advisors in the Logistics division, and put to the host for approval. The staff person responsible should suggest a range of possible gifts, and outline any factors (eg. general value) drawn from summit tradition (if applicable). While a list of alternatives should be offered, experience shows that the host's office, if not the spouse of the host or the host directly, may want to select the official gifts personally. However, the Administration division, should be responsible for purchasing, wrapping, and distribution of the gifts. Depending on the status of the VIP, the Security division might have to be involved once the gifts are purchased, to oversee their wrapping and to take charge of their safe storage and eventual delivery.

PUBLIC AFFAIRS AND MEDIA RELATIONS

A Public Affairs and Media Relations unit, under a director-level manager, should be a part of any summit office, and situated in the Executive Office in a staff relationship to the Executive Director.

This unit is responsible for directing and overseeing the development and delivery of a coordinated, consistent and high-quality communications package for the summit, covering all non-substantive aspects (eg. logistical, budgetary). It works closely with those responsible for the substantive preparations to achieve coordination and pursue common communications goals. The overall objective will be to see that public and media perceptions of the summit event, both domestically and internationally, are of the most positive kind.

Communications Plan:

The communications plan covering organizational matters should be developed as soon as is possible, with a strict set of objectives and steps for implementation by all involved personnel. Channels should be maintained with the Host Prime Minister's office to allow for better understanding as to what the Host and the key concerned Ministers feel is of particular importance. The plan will need to be regularly reviewed and revised to respond to changing circumstances.

When the event is held outside the capital, it can be a challenge to promote and sustain the image of the host government as the host of the summit, since other levels of government will seek to build high profiles through their own communications plans. An active media relations effort should be maintained throughout, emphasizing the host's role at the Summit, improving the public and media perception of the summit as a positive event, disseminating information on organizational planning and promoting human interest stories.

In order to maintain a positive profile, a series of carefully planned briefings and news conferences, involving host government Ministers, local political figures, government officials, and sponsors should be scheduled during the preparatory phase. These briefings should emphasize the benefits of the summit to the municipality, province and country. Photo opportunities should be arranged for the media to highlight some of the more interesting logistical arrangements (eg. the raising of the summit flag, the provision of the cars for use of the VIPs, the fine arts and crafts collection, the use of volunteers, design and construction of the meeting facilities). General news releases once or twice a week in the immediate lead-up period can help to create a positive sense of excitement around the summit and prevent the organizers from having to be constantly on the

defensive about lack of information. It is far better to "act" than to "react".

Media Spokesperson:

It is very important to have an experienced spokesperson, situated within the **Public Affairs and Media Relations** unit who knows the local media personalities and is respected by them, and who thus is able to develop stories and deal with any misinformation. This person should be on staff at least four months before the summit specifically to manage media relations, especially in conveying the host's role and presence when the event is outside the capital region.

This position should be the chief contact point in the summit office for all media and general public inquiries in advance and during the Summit. In addition, the spokesperson provides the necessary liaison between the summit office and the press offices of all levels of government (Prime Minister's office to City Hall), and between the summit office and the public relations personnel attached to all organizations, businesses, etc. providing sites, goods and services to the summit. Approximately one month before the summit, these public relations personnel should be briefed as a group and provided with written guidance as to what enquires will be handled by the summit office, what can be dealt with by non-summit personnel, and what should (or should not) be said. This will help prevent any conflicting or wrong information being given to the media.

During the summit, the public affairs unit is responsible for handling all media, public and other outside enquiries concerning logistical arrangements. This section should have a close relationship with the media relations liaison officers assigned to various delegations.

A special system should be in place during the summit to respond quickly to the inevitable media interest in security matters. Speculative stories on security can easily detract attention from the other news of the meeting. The summit office spokesperson should be in close liaison with the **Security Task Force's** information office, which would reply in the first instance to such media enquiries.

The **Public Affairs and Media Relations** unit handles all requests for live and taped interviews, identify appropriate spokespersons and handling arrangements. This unit can also look after special "tours" for VIP guests, politicians, sponsors, etc.

Publications:

This unit should coordinate all printing requirements for the summit, meeting with all sections with those requirements and preparing a production schedule. Printing

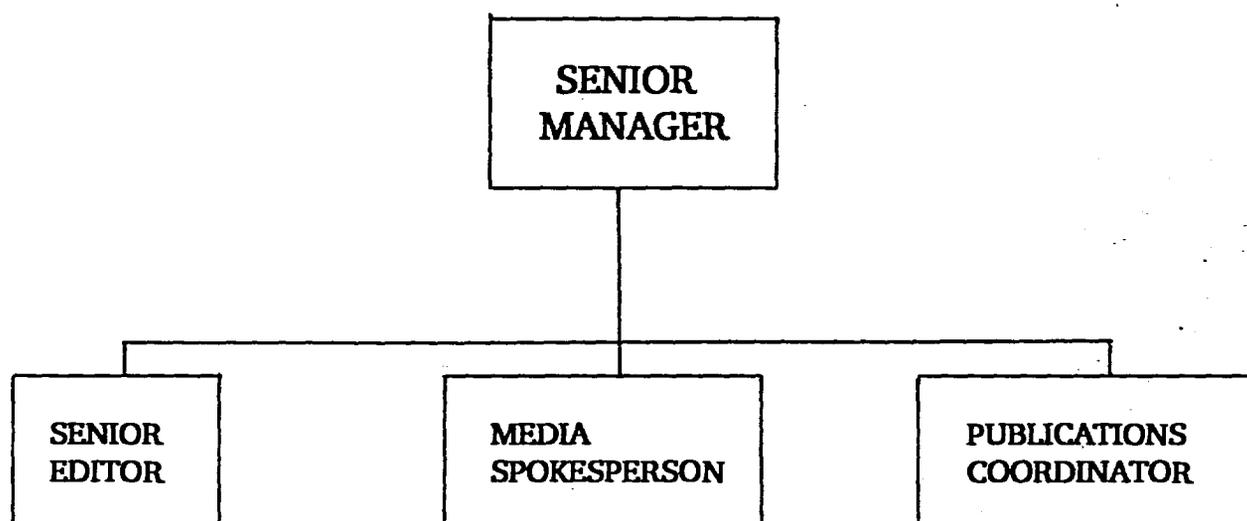
requirements include the summit poster, delegate and media handbooks, printed programmes, menus, invitations, and office letterhead and envelopes.

The senior editor should be responsible for ensuring that the 'content' and 'look' of all publications, including those publications coming from the substantive side, conform to the communications plan. A fully coordinated "family look" for the summit heightens the effectiveness and impact of the entire communications plan.

The services of a graphic arts firm to provide design services, typesetting and camera-ready artwork for the various publications will be required early on in the planning phase. At the same time, a public relations firm can be contracted to help organizers develop an overall communication plan, design a summit "logo", and prepare a "family look" for all the publications.

Appendix E provides an insight into the potential scope of the publication requirements.

PUBLIC AFFAIRS AND MEDIA RELATIONS



CRITICAL PATH

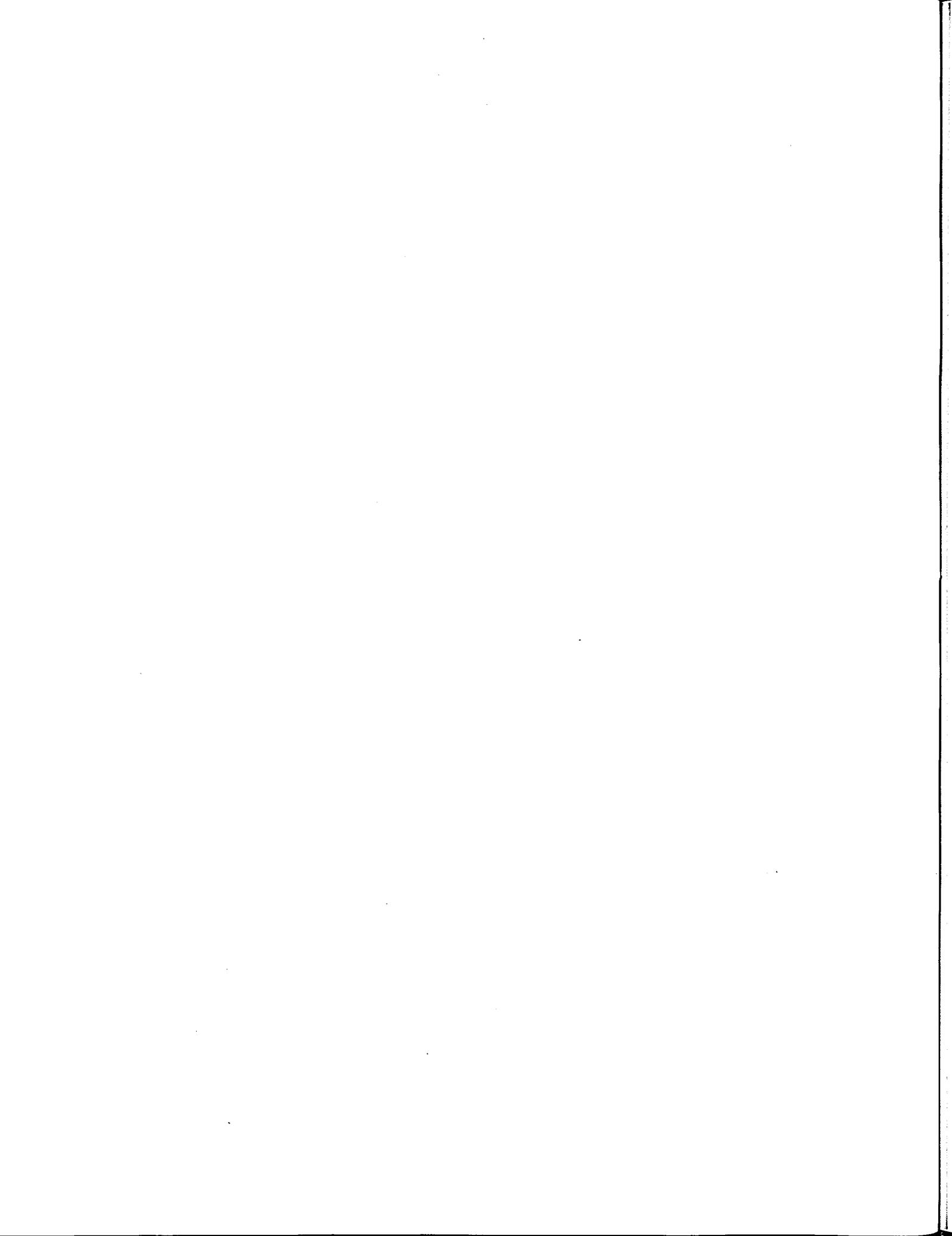
The development of an overall planning document, or critical path, constitutes an essential planning and coordination activity, as well as a learning experience. Careful planning is key to a successful summit, and the creation of the critical path starts the preparatory phase. The critical path is especially important if many staff are new to summit organization.

Preparation of a critical path requires considerable detailed work and time to complete. Yet, there is no more effective way to demonstrate to all participants the totality and complexity of the project and the coordination needed for success.

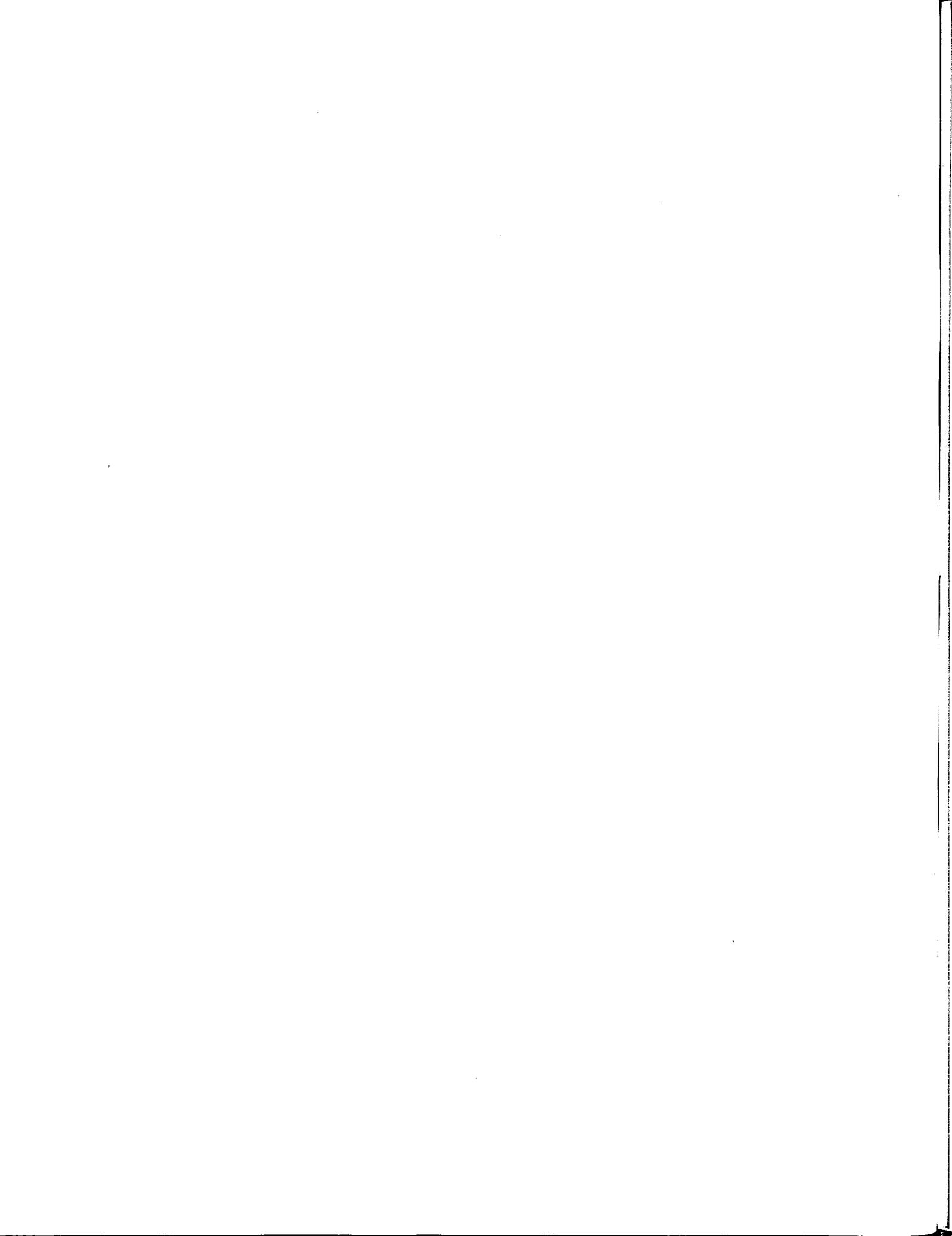
For this reason, as many members of the staff as possible should participate in the critical path sessions, chaired by the senior manager, Plans and Programmes, or the Executive Director. The process forces everyone involved to focus on the planning process and, to identify the time and effort needed to implement plans and meet objectives.

In the event that more than one summit is being organized by the same group, the critical path exercise can usually be completed more quickly for the second summit and is less important as a learning tool.

Once complete, the subsequent checklist of tasks and deadlines becomes invaluable for ensuring thoroughness and timeliness of preparations. Regular monthly or bi-weekly meetings should be held to review and, if necessary, revise the critical path. It becomes a vital tool for the Executive Director for tracking overall progress, section by section throughout the preparatory phase. By the time preparations reach the "transition phase", however, several weeks before the summit, events are usually moving too quickly for the critical path to be useful.



SETTING THE STAGE



CHOOSING THE SETTING

Taking the summit or conference out of the capital provides the host government with opportunities to expose international visitors to different and diverse regions of the country, to invite other levels of government to join in the hosting effort, and to increase local awareness of the outside world and the country's interests internationally. This should be done with the knowledge that, among other things, this will occasion higher costs and the need to spend time attending to relationships with local levels of government.

When considering summit locations, it is important to visit potential sites and view facilities directly, and to make provisional bookings well in advance for meeting and hotel space. Summit organizers should also assure themselves ahead of time that any funding and staffing ceilings will be adequate for the different locations.

To ensure fullest cooperation and financial assistance, the best time to negotiate with the other levels of government on what they could contribute to the summit is before a final choice is made. Seeking contributions from regional governments engages them as partners in the hosting effort and achieves economies. Sustained international media attention during a summit can have positive long term benefits and this should be pointed out during the negotiations. (They might be offered the opportunity to contribute a complementary media food facility, such as was provided at the **Economic Summit** in June 1988 by both the city of Toronto and the Province of Ontario.) Although costs will be higher, the broader benefits to the country and the sharing of expenses can more than compensate for the decision to hold a summit outside the capital.

Involving Other Levels of Government:

Involving other jurisdictions inevitably increases the coordination effort required. It creates a whole new set of stresses not present when one controls all aspects of the organization. Some integration of other government officials into the summit planning sessions can help avoid inter-jurisdictional tensions. A Coordinating Committee could be formed, chaired by the Executive Director of the **Organizing Task Force**, and attended by representatives from the other jurisdictions.

If the other participating levels of government have never before been involved in the organization of a major summit, they will have no idea of the magnitude of the logistical arrangements. They will also probably need to be acquainted with the

restrictions placed upon the preparations by security requirements. Including them within the summit planning sessions will result in clear lines of communication between the levels of government. They will feel fully involved and see how their own contribution of facilities and services fits into the larger picture.

Is a Site Office Required?

The proximity of the host city to the capital becomes an important factor when the decision of whether or not to open a site office is made. Implementation of the two-office system requires a great deal of flexibility by both staff and management, and should be very carefully considered.

In the case of the Commonwealth Heads of Government Meeting in Vancouver, the host city was five hours away by air. A site office, staffed with a site manager and a small complement of local assistant managers, was therefore established six months prior to the summit. This enabled the summit organizers to maintain a presence in the city in lieu of more frequent travel.

The staffing of the site office is done in stages on an "as required" basis. Along with a site manager, the first two areas which will most likely require assistant managers right away are Logistics and Administration/Personnel, with the possibility of a third in Conference Facilities. The site manager should be responsible for monitoring and guiding the work of the assistants, should keep the Executive Director apprised of overall preparations from the site's perspective, and should handle certain horizontal tasks (such as relations with the levels of government). The assistant managers from each of the various sections will receive their instructions either directly from their division director or through the site manager. This system has to be flexible. The site manager must provide general guidance and supervision to each of the assistant managers, and yet not interfere with the direct lines from their directors in the capital.

The Organizing Task Force should move completely to the host city eight to ten weeks ahead of the summit.

When this occurs, the site office becomes the main headquarters for the summit. The site manager's functions with regard to monitoring and guiding the office cease; the assistants report exclusively to their directors and are folded into the Task Force. The site manager can be re-assigned other special duties, becoming for example coordinator of a specific event, senior assistant to the Executive Director, etc.

If the chosen location for the summit is within a one or two hours travelling time from the capital, there is probably no need to open a site office prior to the actual transfer of the Task Force. Management will still want to establish physical premises in

which to work prior to the move. There will be a need to relocate the different sections on an "as-required basis" - eg. Conference Facilities will most likely be on-site in advance of Liaison and Coordination. The decision on when the entire Task Force should all be located in the host city (6 - 8 weeks ahead) should be made early on to facilitate planning.

DEVELOPING THE PROGRAMME

In order to strengthen the horizontal management capabilities of the Executive Office, particularly in planning and in programme and event management, a **Plans and Programmes** unit should be included within the Executive Office. The senior manager position for Plans and Programmes should be the equivalent to the line directors.

Plans and Programmes works with other directors on the design of the overall programme in response to the requirements of the summit in question and the wishes of the Host. The manager is responsible for the eventual implementation of the Official Programme, overseeing a set of event managers who work in turn on each event together with representatives from the other sections: Logistics, Conference Site and Preparations, Liaison and Coordination, Media, Security, Special Activities and Programmes, and Administration and Finance. The mandate of the **Plans and Programmes** also includes the preparation of detailed event scenarios, in cooperation with each event manager who will be responsible for its implementation.

The Development of the Official Programme:

Ideally, the first draft of a basic Programme should be completed six months prior to the summit. This allows approximately four to eight weeks for any adjustments, refinements, and the final decision-making, and gives the summit organizers at least four months lead-time to put arrangements in place. Until the Official Programme is set, the final selection of events and event sites cannot occur, which in turn makes final decisions on transportation, hospitality, "fit-up" and budget almost an impossibility.

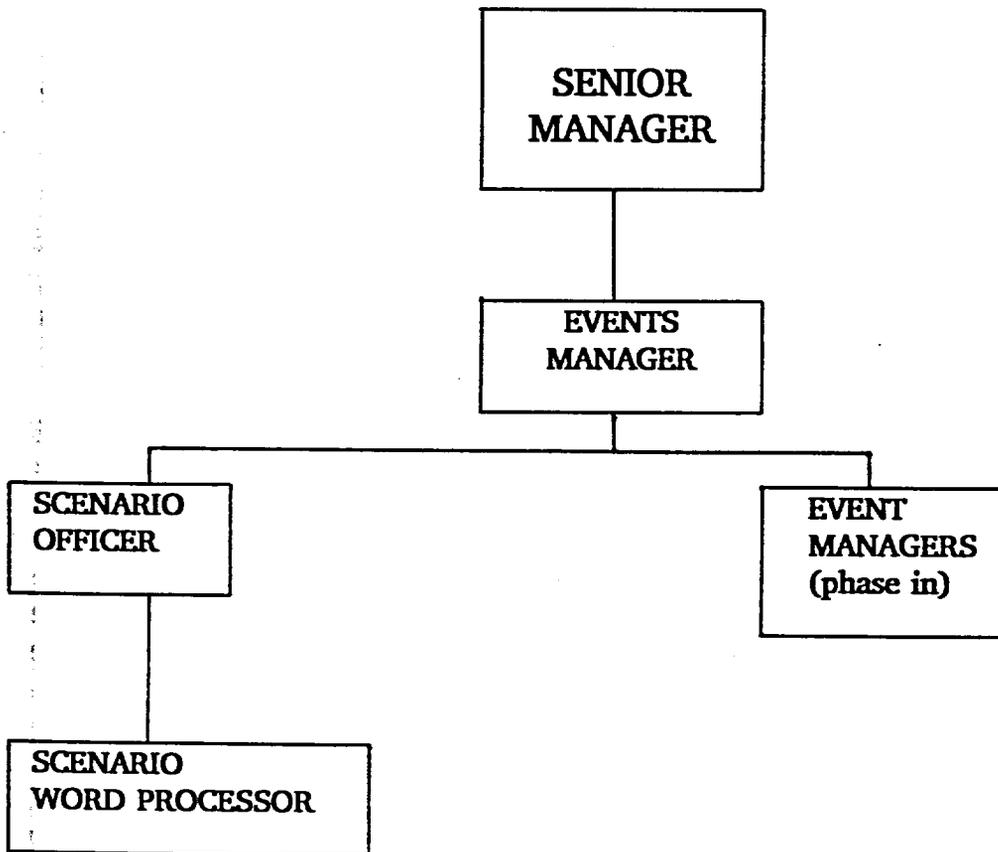
The summit organizers must ensure that the decision-makers at the political level, as well as the substantive planners who often have a prominent role in this process, are constantly aware of the organizational timeframes and constraints attached to the Programme decisions. Earlier Programme decisions inevitably mean better logistical arrangements and facilities.

When submitting the draft Programme it is best to prepare two or three different options, which include optional event sites. It is critical that the options make logistical sense. It is also advantageous to keep the contents and the movements associated with each event as simple and as clean as possible. In all probability, the main elements of the Official Programme option chosen by the Host (ie. the numbers and kinds of meetings, but not the event sites) will have to be approved by other participating governments (or participants).

Until final decisions are made, summit organizers must accept that, in the preparatory phase, there should be flexibility in all of the logistical arrangements. A considerable amount of hypothetical planning is necessary, which can be burdensome and even frustrating for staff.

It is important that a decision be made early on in the planning stages as to whether Plans and Programmes should be responsible for making arrangements (ie. for bilaterals etc.) additional to the formal Programme. It is recommended that Plans and Programmes concentrate on the Official Programme only. Programmes for host government ministers should be handled by their staffs and any confusion on this point should be solved in the early stages of planning.

PLANS AND PROGRAMMES



DEVELOPING SPECIAL PROGRAMMES

The mandate of the **Special Activities and Programmes** division is to realize the objectives set by the summit organization in terms of the spousal programme, the delegates' programme, the use of volunteers ("volunteers' programme"), and any other special programme which might be considered.

Delegates' Services and Programme

The Delegate Services section is responsible for the following:

1. developing and delivering a programme of activities for delegates
2. preparing the delegates' programme booklet and delegates' welcome kits
3. developing a listing of services available for delegates: ie. banking, airline, post offices, travel services/information, etc.

If the summit is limited in duration and very work intensive, a specially developed programme for delegates is a waste of effort. Instead, the local visitors' and/or convention bureaus can be asked to maintain kiosks on-site or in areas easily accessible to both delegates and media (ie. hotels, meeting sites, media centres).

Alternatively, volunteers can be stationed in various locations at hotels and meeting sites with information "at their fingertips". As a back-up, hotel concierges should be alerted and asked to offer their normal services, assisted by the local convention bureau or volunteers as required. Delegates are often too busy to avail themselves of even the most rudimentary extra-curricular programme offered by the organizers. Because of this, the best service for delegates would be the preparation of an inventory of outside activities, tours and so on which already exist. The most used activity is very often the City Highlights Tour offered by local bus companies.

Delegates' kits usually contain information directly relating to the Summit, along with an inventory of available local activities, restaurants, etc., plus additional tourism information supplied by the local Convention and Visitors Associations. The assembling of these kits just before the summit is an ideal job for volunteers.

The Spousal Programme:

Depending on the number of spouses in attendance, the programme could vary greatly in size and scope. It is crucial that the organizers have early knowledge of how many spouses will be attending the summit. Through the Aide Memoire (Appendix B) the organizers can obtain some initial information. However, if the spouse of the Host (or ministers, if involved) will be in attendance, a formal invitation to their opposite numbers is not only very appropriate, but can be used to encourage other spouses to be present..

The responsibilities of the Spousal Programme section are as follows:

1. to prepare an inventory of possible activities for submission to the Host spouses' office, and then to develop a detailed programme based on this input
2. to evaluate the costs of each activity prior to submission and to maintain cost controls, working closely with Finance
3. to develop detailed scenarios, working with Plans and Programmes
4. to prepare complete briefings for the Host spouse's office, if necessary
5. to prepare the Spousal Programme booklet
6. to implement and manage each activity

This Programme offers a great opportunity to highlight the best of national and local culture (ie. museums, the visual and performing arts, economic and education themes). However, a balance between official functions and free time (for shopping, private activities) should be maintained.

Advance preparations are vital. In some cases, a Spousal Programme event can require as much advance planning as any summit event involving leaders, create as many logistical problems, and depending on the spouse(s) in attendance, generate as many security requirements. The site selection process for all spousal events should take into consideration the same criteria as for the Official Programme events. The site selection for both the Official Programme and the Spousal Programme must be closely coordinated to avoid logistical complications and possible over-taxing of security resources.

Volunteer Recruitment and Placement:

The overall Volunteer Programme should be designed in tandem with all other preparations, by a dedicated manager with strong inter-personal skills. Each division should be asked to identify potential volunteer jobs within their mandate and to work with the Volunteer Programme manager in their selection and placement. Putting in place these arrangements can be very time-consuming, but, if properly done, will be a useful investment in the organization's overall image and success.

Volunteers should be carefully selected and assigned to appropriate jobs where their time will be used productively. (Idleness will lead to low morale and dropping out at the crucial final stages.) They should be assigned to one section only, be trained within that section, and become part of the team. Any needs for a security clearances should be established well in advance so that the necessary applications can be made.

There can be some skepticism among the professional staff that volunteers can or should be allowed to handle certain jobs. It is very important that volunteers are not placed in positions where they could be held accountable for the expenditure of any government funds, for the supervision of permanent staff (however, they could supervise other volunteers), or for the performance of difficult duties involving high risk and expectations. However, they must be made to feel that they are part of the team, and are making a positive contribution to the summit's outcome.

The goal of the Volunteer Programme should be to involve as many sectors of the population as possible. Some potential sources for volunteers are as follows:

1. community groups, service clubs and associations
2. high schools, universities
3. host and/or local government personnel

Some challenges which could be encountered with volunteers are as follows:

1. assembling a set of volunteers that is acceptable to all volunteer user groups
2. getting volunteers accredited in time
3. keeping up interest and avoiding last-minute drop-outs
4. marshalling, training and controlling of volunteer help

Possible placements for volunteers in the summit organization are as follows:

1. on delegate/media hotel information desks
2. on airport information desks
3. as messengers
4. in the media centre: check room, information desk
5. in the invitation section: manning the phone bank, preparing invitations
6. Spousal Programme assistance
7. training of other volunteers

The Guest List and Invitation Section

The Guest List and Invitation section is responsible for the issuance of all invitations to public events during the summit. Its size will depend on the number of public events and the potential number of invited guests. However, organizers should never underestimate the work involved in handling invitations and guest lists. Depending on the event, there could be a last-minute 'rush' for invitations, and the section will have to have a system in place to handle it.

It is vital that the guest lists for any special event surrounding the summit be established at least four weeks prior to the summit. The Security division will almost certainly have to be involved and take security precautions, including a thorough check of the guest list. This all takes time.

A plan for controlling invitation lists, for scripting and editing invitations, for printing and distributing them, and for establishing and manning a phone bank to follow up on RSVPs, must be prepared and instituted at an early date. Those responsible at the political level for decisions on guests and invitations must be identified. Policies and procedures should be agreed upon by all concerned (the Organizing Task Force, those responsible for substantive preparations, and the political level. (ie. Host's or ministerial offices). There should be no deviations, except in extreme circumstances.

A staff person should be hired at least two months prior to the summit to take charge of each event. It would be advantageous if these persons have had experience in this type of work, including running phone banks and developing data bases for compiling and cross-checking guest lists.

If a public event is being planned where security arrangements are to be tight, the distribution of invitations will be more complex and probably involve a personal pick-up system. The total process could thus be as follows:

1. compile guest list suggestions from all sources (political, corporate, personal)
2. review potential guest list with all necessary committees and/or sections, and finalize guest list for each event with the political level, four weeks prior to the event, at the latest
3. send out first notice of invitation four weeks prior to event(s)
4. through the phone bank, follow up invitations and notify invitees of where to pick up their formal invitation/ticket(s)
5. at the pick-up point manned by permanent staff or volunteers, hand out invitations to guests on presentation of suitable identification

SELECTING THE SITES

The final decisions on sites can not be made until the Official Programme has been finalized. By placing responsibility for the site selection process with the Senior Manager, Plans and Programmes, in the Executive Office, the linkage and coordination between finalizing both Official Programme and site selection is assured.

The general location chosen for the summit will have a great impact on the entire site selection process. The larger the urban centre, the greater the selection of sites. However, there will also be more complex logistical problems. There is no easy way to choose sites for summit events without a great deal of advance legwork.

Prior to the final decision on the general location for the summit, initial visits to each candidate location or city should include an examination of all potential accommodation and meeting sites. These major sites should be booked on a tentative basis to avoid possible conflicts with conventions. The remaining sites (which include hospitality and special event sites) need not be booked; many requirements may not be known until the Official Programme takes shape.

Once the final decision on the general location is made, a thorough and immediate re-examination of all sites should be carried out. Each should be judged in light of relevant factors (see below) and checked for possible use in meeting the various Programme requirements.

One must ensure that sites are reserved for the full period needed. This includes the time required for set-up and once set-up is completed, for conducting the security sweep and "securing" the site. Event sites should be selected only after the most thorough examination of all factors, principally logistical, security, aesthetic, financial and the presence and quality of hospitality and other services. The most attractive site could eventually pose to be a logistical and financial nightmare.

Security considerations should feature in all site decisions. The amount of security required can make a large difference as to which sites can and cannot be used. Some otherwise excellent sites may have to be eliminated right at the beginning.

The site selection process should be completed as early in the preparation phase as possible. Late site decisions (which often arise with respect to the Spousal Programme) are particularly difficult for security officials. These decisions inevitably create problems for preparing an adequate security plan and assigning appropriate resources.

In a dense urban centre, security risks are going to be higher. Depending on the risk status of the VIPs involved, enhanced security risks could pose particular difficulties. It is crucial that the security officials involved be comfortable with the various site options. By asking them to provide an early written security survey on each possible site, unsuitable sites can be ruled out immediately and reports kept on hand should the prospect of using any rejected site be revisited.

The following actions should also be considered:

1. limiting the number of sites by holding two or more functions at the same location, thus reducing security and other costs
2. where possible, using already secured locations for functions (ie. a delegation hotel)
3. limiting functions to sites within close proximity of the main meeting site to reduce travel time and disruption to the city

As the Official Programme begins to take final shape, the site options can be married with the various event(s) for final decision at the political level. It is a good idea to provide decision makers with at least three appropriate site options for each event. This not only provides choice, but assures that if for one reason or another, the preferred site must later be dropped, the event can easily be relocated to another already-examined site.

The use of a facility belonging to another level of government will inevitably result in some pressure to permit that government to play a role in the design and implementation of the event involved. This is especially true when using a city hall, or provincial/state legislative facility. If this poses a problem, organizers should remove any such expectations when the request for the facility is made.

Reviewing Site Selection Decisions:

In some instances, the choice of site will be dictated more by urgency and the lack of alternatives, rather than a careful cost analysis. In other cases, a spectacular site can come with other limiting factors, such as large security or extravagant fit-up costs. If use of these sites creates a serious budgetary problem, or seems unduly extravagant, despite all cost-cutting and cost-sharing efforts, confirmation should be sought from the political level on whether or not to go ahead with the site in question.

SECURITY

Unfortunately, over the last few years enhanced security dangers, especially the increased risks of terrorist attacks, have made the organization of major international summits far more complex and demanding. The security operation has arguably become the largest and most expensive organizational element for summit hosts. Every logistical aspect must be weighed against security risks. The Security division is therefore a vital part of any summit organization.

In the initial preparatory phase, and before the decision on the general location of the summit is made, negotiations with other levels of government should include discussions on the implications of security arrangements for the locale in question (eg. affects of street closures, motorcades, limited access to summit sites) and the extent of extra police resources required. Before committing to the location, agreement among the municipal/provincial/federal agencies on the provision of resources and the sharing of policing costs should be reached.

When the decision is made to take the summit out of the capital region, host security authorities will have to work with police forces who may have little or no experience with events of this complexity and involving high levels of VIP security. Combining the operations of two (or three) separate police forces is a major coordination job and challenge for the senior host security officer and his associates. It is critical from the outset that everyone understand who has the ultimate command and control.

Securing the Sites:

The general location chosen for the summit (city, resort, or other) will have a large impact on the total budget for security, and in turn on the total summit budget. It is particularly difficult and costly to secure an extensive number of sites in a densely urban environment. The decision to take the summit to a large urban centre must weigh these costs and risks against the logistical and political advantages of such a decision.

Extra security requirements impact on more than just the budget. The whole perception of the summit as a public event will change as the secure perimeters around events extend outwards and as access to the sites becomes more restrictive for everyone. The accreditation system becomes stricter. The need for "accreditation checks" ties up increasing resources and can lead to frustrations among the general public affected (eg. suppliers, tenants in site locations).

Just How Secure Can The Sites Get?

The role of Security in the site selection process is covered in the previous chapter.

One very real aspect of the heightened security requirements is the possibility of having to deny the public access to the proximity of a meeting site for an extended period. If so, agreements may need to be concluded with major tenants and businesses located at or near the site to make good any business losses resulting from such restrictions. Organizers will have to consider where the line should be drawn between the rights of private citizens and the safety of the VIP guests. Is the site to be used worth the expense and inconvenience that will be incurred?

A decision to pay compensation for loss of business can be costly. It should be reached only after completely exhausting all other available options. It can strengthen the public impression that hosting major conferences only results in major disruptions to a host city and its population.

Transporting the VIPS:

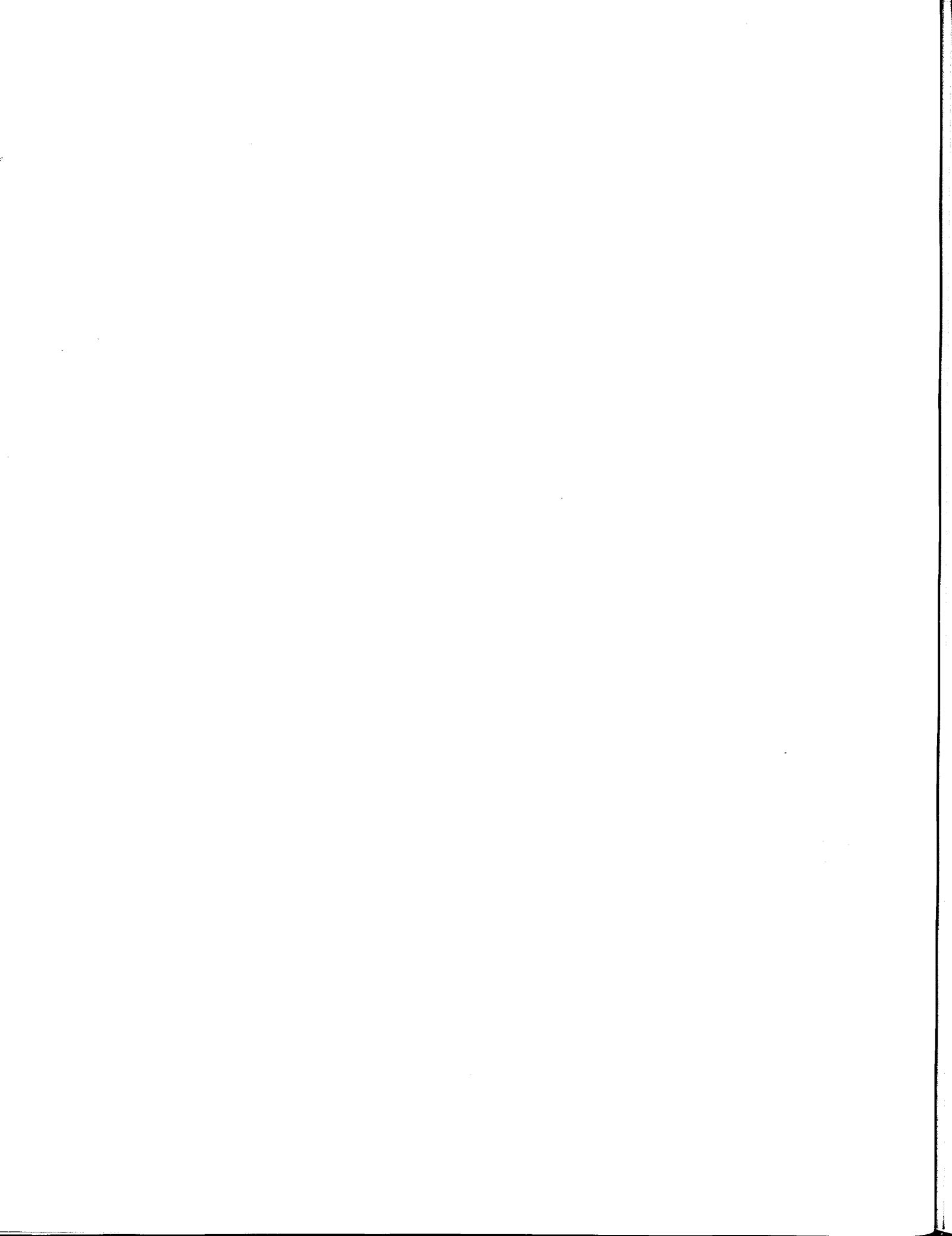
Security will have to work very closely with Logistics and with Plans and Programmes in order to ensure a workable motorcade system. All motorcade movements must be carefully planned and timed well in advance so that the scheduling of events takes into consideration sufficient travel time. As well, the motorcade system must be as flexible as possible so that any adjustments in the Official Programme during the summit itself does not throw the whole system into chaos.

The Logistics division would normally be responsible for the acquisition of the vehicles for both the VIPS and the delegations. (In the Canadian case, the Department of National Defence, with representatives situated within the Logistics division, was given this responsibility.) For Heads of State and Government (and others, if a high security risk exists) it would normally be the responsibility of Security authorities to design and run the motorcades system and to provide police drivers for the VIP vehicles. (See chapter on the "Logistical Requirements: Transportation" for further information.)

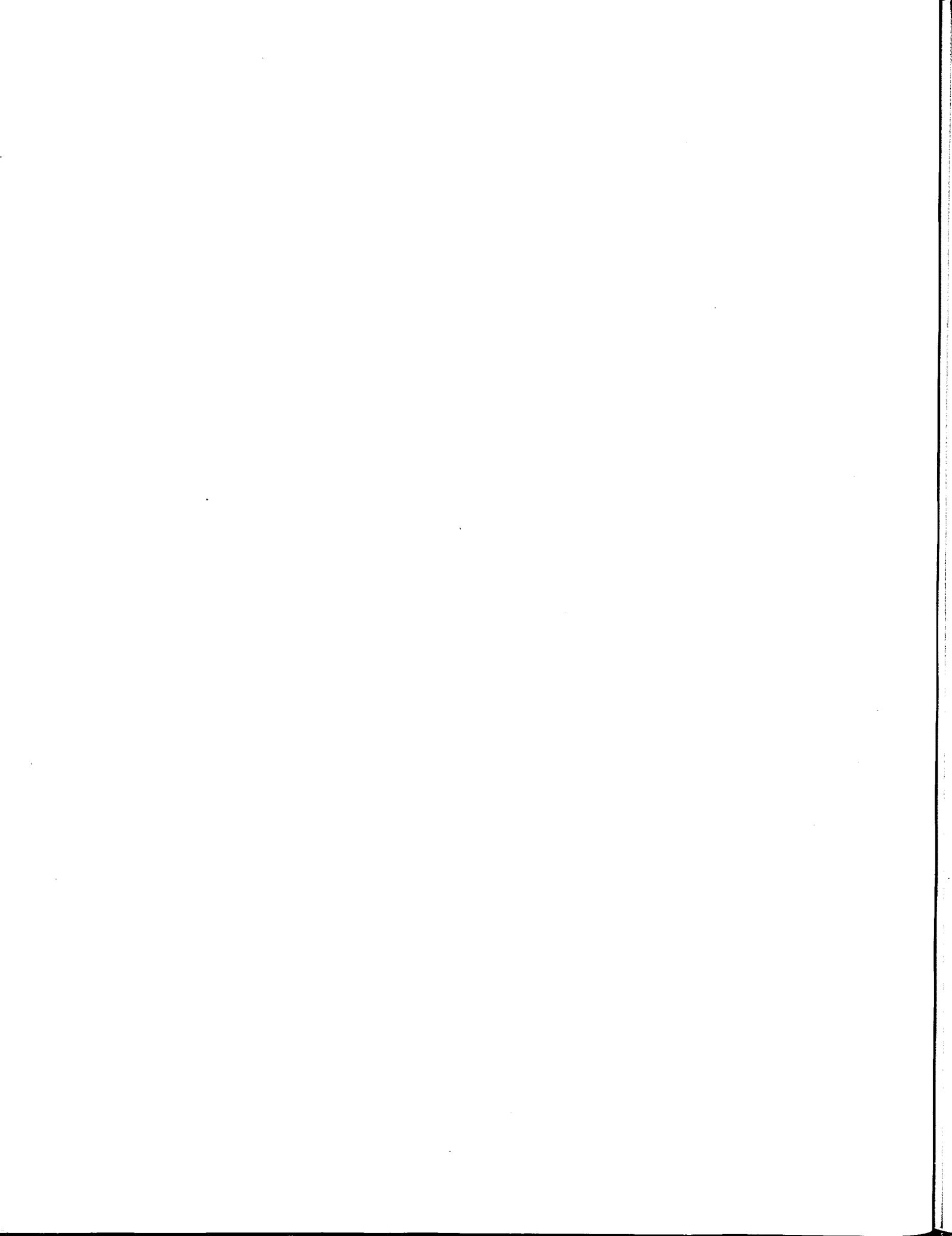
If the number of VIPs is large and the local traffic environment difficult, a "non-dedicated" motorcade system might be an excellent option to choose. Under this system, all of the motorcade "packages" are exactly the same and are not assigned to one specific VIP. Instead, each VIP is transported by the motorcade "package" closest to his/her point of embarkation. The security officer assigned to the VIP is given the responsibility of placing the correct flag on the front of the car, and taking charge of it on arrival. There can be problems with delegations seeing this as "incorrect" protocol, and some VIPs

strongly prefer a single familiar driver. On the positive side, the delays associated with "calling up" the right motorcade for large numbers of VIPs are virtually eliminated. The system functioned virtually flawlessly during the 1987 Francophone and Commonwealth summits.

The ability to track each motorcade through a communication link (radio or cellular phone setup) is invaluable to the smooth running of a summit operation. A constant flow of accurate information is made available to the Operations centre through the security net.



THE PREPARATORY PHASE



THE PREPARATORY PHASE

With the basic organization in place, with a budget, staffing and a critical path in hand, and with most of the main programme and site elements of the summit established (or nearly so), the preparatory phase can begin in earnest. Questions of detail now emerge and will have to be addressed.

Depending on the nature and/or history of the summit or conference to be held, many of these questions are readily answered. For example, the Commonwealth Heads of Government Meeting (CHOGM) is organized in accordance with a Blue Book which the Commonwealth Secretariat makes available to the host government to use as a guide for planning the summit. Some adaptation to local physical constraints at the site and to the specific interests of the Host is normally necessary.

In the case of a first time or a 'one-time' summit, where no such guidelines exist, it will be necessary to innovate and to borrow, where applicable, from the experience and practice of other summits and other summit hosts. This handbook may provide some useful guidance in this respect.

PREPARING THE SITE

MAIN MEETING AND AUXILLARY SITES

The provision and preparation of conference facilities normally require a major commitment of financial resources. This activity can account for as much as two-thirds of the total non-security costs of the summit.

It is the demanding responsibility of Conference Facilities section, within the Conference and Site Preparations division, to ensure that the planning, design, and construction of meeting facilities at the various sites are carried out on-time and on-budget. In order to do just this, the section must have the cooperation of, and a good relationship with, all eventual "users" of the facilities, including media, security, liaison, and most important, participating governments. Close consultation with those working on substantive preparations is essential.

Once the early site visits have been carried out, a preliminary lay-out of the site and costing for the construction should be completed. Plans are then initiated, floor plan layouts developed and approved, and contractors selected. Detailed design work can then be completed, and a complete set of drawings prepared. From this point on (approximately six - eight weeks ahead), major changes to the design should not be permitted. The use of a computer for all working drawings can be very cost and labour efficient.

The practice of drawing heavily on the resources and expertise of other government departments, particularly those (such as Public Works Canada, in Canadian experience) with expertise in negotiating leasing and other agreements, and in constructing major facilities, should be followed. The use of a project team to manage the entire construction of the main meeting and media facilities, and to provide design, contracting and construction expertise, is strongly recommended. This project team could be led and staffed by specialists from outside the Task Force, but clearly under the overall direction of the manager of the Conference Facilities section.

The procurement aspect for a conference is of critical importance, especially procurement for the conference facilities. The selection and acquisition of the supplies and furnishings required to "fit-up" the conference sites impacts on the entire summit.

CONSTRUCTION

The amount of construction required at all selected sites, the sophistication of the facilities, and the lead time involved, are all key factors. They make the difference between a major construction project and a simple move-in operation. In some cases, the requirements for the meeting are such that major renovations will have to be done within an already existing facility. Not only do the costs increase, but adequate lead time becomes crucial as the magnitude of the construction project grows.

The selection of a major local construction firm with a large resource base and a reputation for meeting major challenges on schedule can make a large difference, especially if there are any handicaps and surprises along the way, as there will be.

When summit timings and locations are being considered, organizers should make themselves aware of any potential for labour unrest. Recommendations on sites should take into account the prospect of such difficulties. Throughout the entire preparatory period, organizers must be on the constant look-out for signs of labour trouble affecting arrangements.

If despite precautions, a strike situation develops, prompt action should be taken to brief authorities in the appropriate government office (usually the Ministry of Labour), and to acquaint senior management and political levels with possible remedies and alternative courses of action. It may be possible, for instance, to enact legislation exempting the "summit project" from strike action, with the cooperation of the trades concerned.

An additional problem that could arise during the set-up of the site(s) is the necessity to control access for security reasons just prior to the start of the summit. To reduce frustrations and confusion, and the danger of work delays, everyone who might potentially have to be on site just prior to the summit should be accredited.

TIME FACTORS

When booking facilities, summit planners must try to ensure that there is sufficient lead-time provided to complete set-up during regular working hours. Very tight time constraints during the move-in period, and even during move-out, can greatly affect the quality of preparations, and ultimately, the overall image and success of the summit. Moreover, sufficient lead-time for the construction, set-up and securing of the site(s) can prevent potentially large cost overruns in both construction and overtime.

Attention should be paid to careful scheduling of all conference construction and fit-up activities, especially if the lead-time available is limited. Organizers should not neglect to pay the same attention to tear-down.

For every site, separate schedules should be drawn up covering the construction phase, other conference fit-up activities (furniture, enhancement, etc.) and move-out. This is exacting, detailed work. Every possible eventuality should be covered, and everything planned in proper sequence, including time to put the security net in place. The more thorough the planning, and detailed the scheduling, the smoother actual move-ins and move-outs will be.

The demands made upon the Conference and Site Preparation division increase closer to the summit. During the "scenario reviews" and "dry-runs", details previously missed will be uncovered, additional security requirements may arise, and visiting delegations make last minute demands, all requiring immediate attention. Staff will often be stretched to the limit by these last minute requests. For this reason all advance preparations should be as thoroughly thought out as possible.

SITE ENHANCEMENT AND MATERIEL MANAGEMENT

Highly successful "site enhancement" programmes were put in place for the Canadian summits. The use of canadian crafts, fine arts, floral decoration and furniture design to decorate meeting and office areas added beauty and distinction, and provided an opportunity to highlight local artists and craftspersons.

Contacts with curators of the local corporate art collections, with fine furniture houses, with arts and crafts councils, and with local floral societies should be established early on. Adequate time must be provided to negotiate arrangements (including wherever possible, loans of materials for the main meeting area), and to assemble and select items for eventual display.

News conferences and/or press releases on the opportunities being provided to local fine arts and crafts communities is one excellent method of maintaining a positive profile for the summit during the lead-up to the event. When negotiating with the arts community, local suppliers, floral societies, etc., the possibility for promotional opportunities should be used.

The process of identifying all other furniture and equipment requirements, as well as sources for the thousands of items needed, can be very time-consuming. The cooperation of the local office of the host government's procurement agency can be invaluable in the identification of possible suppliers and in tendering for, and letting the many contracts required. Organizers may have to make special efforts to convince the local agency to appreciate the magnitude of the task and to give it the early attention it requires.

In order to keep track of the literally, thousands of items required, a comprehensive data base should be established which contains all of the requirements and which tracks acquisition, distribution and (if on loan) return of items to the central supply depot. The importance of this supply depot as a central point for all materiel management cannot be over emphasized. One of the first areas to be established on-site should be the supply depot; it will most likely be the last facility to vacate the premises when the summit is over.

COMMUNICATIONS

A communications coordinator should be brought in on a full time basis at the inception of the Task Force and be assigned the responsibility of providing a reliable and multifaceted communications network for use before and during the conference.

A functioning network incorporating telephones, pagers and two-way radios should be established and tested before the summit so that during the actual event all communications flow reliably and smoothly through the Operations Centre. The communications coordinator should be present in all of the Operations Centre working group meetings, as well as at the "scenario reviews". To properly measure requirements, he/she should be aware of every instance during the summit when one staff member must be in contact with another.

The smooth running of the Operations Centre depends almost entirely upon the quality of the communications network. No section can function without having a proper communications system in place. Often too little attention is paid within sections to their own communications requirements; thus the communications coordinator must usually initiate discussions with each director and potential user and seek out the necessary information.

It is the responsibility of the communications coordinator to make sure that all potential user groups focus clearly on the quantity and type of communications requirements they will have. If the communications issue is left to the last minute, it may be difficult or impossible to ensure sufficient equipment for all those needing it. Until the coordinator knows what is required, the equipment cannot be ordered.

All users of the communications equipment should be required to attend training sessions. Training sessions should be limited to ten to fifteen people and repeated if necessary. It is important that all users are comfortable with the "call signs" and "pro-words" prior to the conference.

A common complaint by the Security division is that classified information gets transmitted over cellular telephones and radios. Management must emphasize the need for communications security and give on-going instruction to the users. Including a member from Security in training sessions can be very effective.

LICENSING AGREEMENTS

The negotiation of access agreements with firms and organizations whose premises are to be used or otherwise affected by the summit, or whose services/facilities are required during the summit, can be a major task. In those instances where security closures are in effect at the main meeting site and possibly other sites, many services and facilities could be affected by loss of business.

Early recognition must be given to the magnitude and potential cost of negotiating licencing agreements, and adequate resources set aside. The potential for restricting public access should be identified in the security report written during the site selection process.

In the event that a commercial area is to be closed to the public, yet still accessible to all delegates and possibly media, it may be possible to conclude a "guarantee of business" arrangement. This arrangement is one that will "guarantee" to the business affected a certain level of business sales (eg. equivalent to last year's figures at the same time) during the closure. If delegates' or media business falls short of this agreed level, the organizing body agrees to make up the difference.

LOGISTICAL REQUIREMENTS

THE LIAISON FUNCTION

The **Liaison and Coordination** division is primarily responsible for keeping governments attending the summit abreast of conference planning and securing their cooperation. This is accomplished through their local missions or sometimes through host country embassies in foreign capitals. (The division also is responsible for assisting the Executive Director in internal coordination and for briefing and ensuring relations with other government departments and levels of government remain smooth and cooperative.

Early stages: Aide Memoire and Advance Visits

The **Coordination** section is the first unit in the division to be established, and until the liaison function splits off three months prior to the summit, its responsibilities include liaison with the missions of participating countries.

Working closely with the other divisions in the **Organizing Task Force**, the **Coordination** section prepares the Aide Memoire (see Appendix B), which outlines services that the host government will provide to delegations attending the summit, and seeks certain logistical and other information from participants, with deadlines for replies. This document is sent out to the diplomatic missions of the participating countries and the information received back is distributed quickly to the divisions requiring it.

The **Coordination Section** is also responsible for organizing advance site visits, and briefing the embassies and any advance visitors from the participating countries on the progress of conference planning. Setting and adhering strictly to certain "windows", or blocks of days, for hosting these advance visits helps avoid the load of an unending series of visits, and ensures that participants get consistent information well-prepared for each visit period.

Liaison with advance visit parties from participating countries should be handled with care and be designed to build confidence in summit arrangements. Representatives are normally given a tour of the conference and media facilities, and updated on all aspects of conference planning. They could also be introduced to the key members of the **Organizing Task Force**, and be briefed on summit issues by the group preparing the substantive agenda.

Recruitment and Training of Liaison Officers:

Approximately three months prior to the summit, the person within the **Coordination** section who has been responsible for the recruitment of the liaison officers (LO's) and advance visits, should separate him/herself from the Coordination section and form a separate **Liaison** section. It is its responsibility to prepare the detailed Liaison Officer Programme, and to bring in and train the officers. Those officers brought in first would normally be the best prepared to man the liaison officer desk assignments in the Operations Centre.

Foreign service officers normally make excellent choices as personal liaison officers for the Heads of State and Government, especially officers currently posted to the countries concerned. If it is decided to assign two liaison officers per delegation, these additional liaison officers (normally assigned to assist the delegations as a whole) might be recruited from other levels of government. This is a good means of including other jurisdictions, and bringing a local expertise to the liaison team.

Contacts with local missions will increase markedly in the final weeks prior to the summit. This can be onerous and extensive work. One liaison officer for each participant (or, as an interim measure, for groups of participants) should be on staff at least four weeks in advance of the summit to deal with the local missions and ensure that their legitimate needs are being met.

It is vital that all liaison officer staff are on strength early enough to take part in a thorough training programme designed to familiarize them with the roles and responsibilities of the entire Organizing Task Force, the Official Programme, the conference facilities and services at all sites, and with all of the summit scenarios. If possible, liaison staff should participate in final scenario review; it is essential that they be present to take part in the "dry runs".

The quality of the training programme for the liaison officers can make a large difference in the smooth operation of the summit, and add considerably to the quality of service given the VIPS and their delegations. At a minimum, all liaison officers should be:

1. briefed on their assigned country (political system, economy and relations)

2. thoroughly familiar with:

- the layout of all site(s)
- all transportation arrangements and the systems in place
- the communications network and its use
- the Official Programme and scenarios
- all documentation

3. able to obtain and provide information on local facilities and conditions, if required, or know where to direct delegations for such information

The Liaison section is also responsible for the preparation of a Liaison Officer Manual, working closely with the publications coordinator. Included in the manual should be all pertinent information regarding the organization of the summit, but particularly the Official Programme, separate scenarios, site layouts, transportation and communications arrangements.

See "Transitional Phase: Liaison Officers" for the roles and responsibilities of liaison staff during the summit.

ACCOMMODATION

Hotels should be selected as early as possible for delegation accommodation. Conventions often book years in advance so summit organizers should not hesitate to block book hotels a year or more ahead and even before a final location (city, resort) has been selected. It is easier to release rooms previously booked than to get hotels to cancel bookings made by others in the interim.

The criteria for selection are location, comparability (in quality of accommodation, function space and service), and availability of large suites (if required) for VIPs. In making the bookings, an "educated guess" on the number of summit participants will have to be made, using information from previous summits as a basis.

Initial meetings should be held with the individual hotel sales staff to block book these rooms and confirm contract deadlines. During the first liaison meetings with embassy officials from each country, one should discuss accommodation, confirming the number of potential participants, the location of the hotel, and establishing lines of communication for further contacts on hotel arrangements.

Allocation of Rooms:

The host government will normally assign delegations to particular hotels, possibly taking preferences into account. Placing delegations in hotels owned by nationals of their own country may not only be appreciated by the guests, but also by the hotel and thus valuable in negotiating special services and function space. The allocation of individual delegate rooms and requirements for any additional meeting space should be left to the delegations, working with the hotel staff directly.

The Aide Memoire (see chapter on "The Liaison Function", and Appendix B), should outline clearly the respective roles of host and guests, and set out the responsibilities of the host government with regards to what accommodation is being offered as "hospitality" (eg. suites), and how finances are to be handled.

Apart from the rooms/suites paid for by the host government, embassies should be required to guarantee payment for the rooms reserved for their delegation. This should include a guarantee for incidental expenses. This will greatly reduce the number of "no-shows" and transfers the financial responsibility for the greater portion of rooms from the Task Force to the delegations.

During the early negotiations with some of the hotels, especially those previously 'used' during summits or conferences where bills were left unpaid, it may become apparent that the guarantees provided by some delegations will not be sufficient. In these instances the host government will have to offer some guarantee of its own before any booking agreement can be signed. Usually, an agreement can be reached to satisfy both parties, and as long as the understanding between delegations and the host government is clear, there should not be a serious problem of unpaid bills coming to the host for payment after the event.

Organizers should try and get hotels to provide in-suite hospitality packages and gifts. This saves costs and the results are usually satisfactory.

The Task Force's accommodation/accreditation offices at each hotel should be located in major function rooms and opened at least six days prior to the start of the summit. This facilitates last minute accreditations, trains staff under lighter work conditions, and offers a focal point for providing information to early arriving delegates. Delegates are checked into their hotels using the services of the accommodation offices. One of the on-going responsibilities of accommodation assistants in each hotel is liaison between the Operations Centre and the hotel management so that the hotel can be informed when its VIP guest are returning.

HOSPITALITY ARRANGEMENTS

The hospitality programme for the summit should be drafted early on in the preparatory phase and a budget defined. The budget is usually not too difficult to predict where there are government hospitality guidelines (ie. limits on costs per person) which must be followed. However, much of the detailed planning for hospitality events can only be done in the weeks immediately prior to the summit, once the political level has determined the nature of the overall programme and confirmed the sites to be used.

Responsibility for the hospitality programme for a summit could fall under Protocol or Special Activities, but Canadian organizers placed it within the Conference and Site Preparations division and under the supervision of the Conference Services manager. This arrangement ensured that preparations for hospitality functions were integrated fully into the services package established for each site.

The principal objective of the hospitality section is to complement the summit meeting schedule with a meal programme which provides the delegates, media and staff with the best possible food and beverages in the best possible setting. Often the meeting sites are chosen with hospitality criteria (good kitchen services) far down on the priority list, behind security, location and logistics. This gives hospitality officers a real challenge in providing the necessary "ambience" and special food service.

The hospitality section is responsible for the coordination and supervision of all move-in, set-up and dismantling activities associated with hospitality events. It handles all florists, caterers, and entertainers, looks after food and beverage locations for all events. This includes food services for the VIPs, delegates at large, the security task force, and all of the support staff.

VIP Hospitality:

All hospitality events involving the principal participants in the summit will inevitably become collective efforts. Conference Services staff, the management and chefs of the hospitality locations (restaurants, hotels, clubs), and the personal hospitality advisors (and even chefs) of the hosts themselves, will all become involved in the details of these events. This can be a trying and time-consuming process for all concerned.

Room Management:

In order to ensure various meeting rooms and delegate areas are properly set-up and serviced throughout the summit, a room management system should be developed. Room managers are appointed to look after each main room or area. They perform a wide range of duties, and during proceedings should be positioned where they can respond quickly to the requests of delegates, to other requirements and to small emergencies (spilled water, no glasses left, etc.).

Under the direction of the room management officer, (hired one month before the summit begins), individual room managers can be recruited and trained just prior to the event. One source of room managers could be Task Force administrative staff who may not have work to do during the actual summit.

ARRIVALS AND DEPARTURES

It is the responsibility of the **Logistics/Transport** section, within the **Logistics** division, to plan all of the arrivals and departures for the summit. The section is responsible for:

1. greeting all delegates at their point of entry into the country
2. providing clearance for all delegates through customs and immigration, as quickly and courteously as possible
3. ensuring that transportation is available for delegates from the airport to their hotel/meeting
4. ensuring that all delegates receive their luggage from the airlines and track any missing pieces
5. providing a VIP lounge in the airport(s) for the "official greeting" and an area for the delegates away from the public, including hospitality
6. providing the same environment for departure
7. bidding farewell to the delegates, ensuring that all luggage and tickets have been looked after
8. escorting delegates to the departure gates
9. developing contingency plans due to the weather or diversion of flights
10. keeping the main operations centre informed of all movements through the airport(s)

Planning for arrivals and departures should begin as soon as the **Logistics/Transport** section is staffed, with an initial meeting set up among officials from the host government's transport, customs and immigration ministries and the managers of airports concerned. This initial meeting is an opportunity to brief them on the scope of the summit, and for each of them to designate a responsible official, based at the airport(s) affected, to participate in various working groups. Detailed planning can then begin.

It is the prime responsibility of the Logistics/Transport manager of the Organizing Task Force to coordinate the various working groups (on subjects such as remote arrivals and departures, aircraft/baggage handling, site set-up, media arrivals and arrangements, customs and immigration, and terminals arrivals and departures) and pull together the master plan. Airport security will be involved in all groups.

Dedicated Arrivals:

Some Heads of State and Government, will invariably arrive on their own 'dedicated' (ie. non-commercial) aircraft. In this case, a private arrival location at the airport should be arranged, with a greeting area (complete with ropes, stanchions, carpeting and flags) and space for media and for motorcades. Several Task Force divisions will be involved in meeting these requirements.

Other Relevant Points:

1. An Order-in-Council to extend diplomatic immunities and privileges to all delegates attending the conference should be sought.
2. The inevitable focus on arrangements for "dedicated" aircraft must not detract from planning for VIP and delegation arrivals by commercial flights.
3. Be prepared for the possibility of a rivalry for last arrival between two major players. This should be treated as a technical question of airport handling, rather than a political issue for the Host to resolve.
4. Cellular telephones rather than radios should be used at airports. Often radios do not work well and it is vital that the airport be in close contact with the main Operations Centre.
5. Communications within the Operations Centre among Liaison, Security and Logistics desks concerning the arrivals and departures should be very close. A smooth flow of events - from airport arrival, to motorcade, to reception at the hotel - is key to getting the summit off to a troublefree start. To the tired VIP traveller, the smoothness of the arrivals process creates important first impressions about the quality of the hosting effort.

TRANSPORTATION

The **Logistics/Transport** section within the Logistics division, is also responsible for the coordination of the transportation arrangements.

The concept of a separate government unit (in Canadian experience, the **Department of National Defence**, or DND) assuming operations responsibility for the acquisition of all transport, and the provision of delegation drivers and a transport pool (along with a dispatch service) throughout the summit itself, can be very efficient and cost effective. (This same unit assumed responsibility for baggage handling as well). This leaves the **Logistics/Transport** section in the Logistics division with a role largely limited to developing the transportation policy and general coordination.

As soon as the Organizing Task Force is formed, a transportation coordinator should be assigned to it. This person coordinates the planning between the outside DND unit (if involved) and the Security Task Force (VIP transport), and ensures plans are responsive to programme requirements. It begins with the development of a transportation policy.

The function of the transportation policy is to define clearly what transportation services will be required and how they will be supplied. These services would normally include the following:

1. transportation for the Task Force prior to the start of the summit
2. vehicles for the principal participants (VIPS), and some additional vehicles for delegations
3. a driver communications system and dispatch service
4. a media shuttle service
5. transportation for the host broadcaster
6. sufficient parking for all vehicles
7. facilities for fuelling and cleaning of vehicles
8. a meal and accommodation plan for drivers

Once the transportation policy is finalized by the Task Force, one determines the resources (personnel and vehicles) required. It may be possible to persuade a major automobile manufacturer to provide vehicles at lower cost than might be charged by a rental agency, in return for the publicity derived from transporting the VIPs.

Delegations will require transport on a 24 hour basis, from arrival to departure. Transportation should be, literally, 'ready to go' at least one week prior to the opening of the summit.

Any system of delegation and media shuttle services, as well as quiet-hour service, will be well used. Where large numbers of media are being provided with transportation to several different sites, it is recommended that the vehicle and driver pool be placed at the media site under the supervision of an on-site dispatcher. By being on the spot this individual will have a much better appreciation of hour-by-hour media transport requirements and thus ensure better service for the media.

Motorcades:

A system of non-dedicated motorcades for the VIPs can cut waiting time enormously. See the chapter on "Security Requirements".

To the extent possible, accompanying ministers and "personal representatives" of the Heads of Delegation should be encouraged, if not obliged, to travel to event sites (including to the meeting site from the hotels) with the Head of Delegation motorcade.

Motorists should be advised through newspaper advertisements, well in advance, of the likely traffic disruptions to be caused by the summit.

Baggage Handling:

Baggage handling must be managed by one person, who takes responsibility for the baggage from the time it leaves the plane on arrival through to its delivery to the hotels. The same procedure should be in place for the departure. This official must work closely with both security officials and hotel management.

PROTOCOL'S ROLE

The use of experienced protocol officers during both the final planning stage (advice) and the summit itself (assistance), ensures that all events and movements are accomplished with due regard to the strict protocol expected on summit occasions. Each officer should be highly experienced in the protocol field.

The senior protocol officer should participate in the final advance liaison visits and be on staff for at least one month prior to the summit. This will allow him/her to participate in the last scenario review, and so ensure that all planning meets protocol criteria.

It is critical that all protocol officers have the opportunity to become familiar with the scenarios and programmes, to familiarize themselves with the event sites, and become fully integrated into the summit team.

The role of protocol officers during the summit is a representational one. They are responsible for directing and leading VIPs through "official" greetings and other formal elements of the Programme, at:

1. airports during arrivals/departures
2. hotels (on first arrival)
3. meetings
4. ceremonial events
5. receptions, lunches and dinners

The protocol officers are also responsible for ensuring:

1. that all ceremonial events are planned with attention to precedence among participants (eg. international practice, summit practice)
2. that in events such as the group photo, the placement of the principals is handled quickly, efficiently, without confusion, and with a dignity befitting the level of the subjects
3. that all seating at meetings and at hospitality events is handled according to the recognized order of precedence for the summit, and/or the wishes of the Host and other factors

If parts of the Official Programme are being covered by live television, an important ancilliary role for protocol officers would be to ensure (working with the Host Broadcaster) that all movements in front of live television appear organized and controlled.

Early on in the preparatory phase it is recommended that a Protocol Paper be produced and be available to everyone in the Task Force for use throughout the planning stage. (See the "Protocol Paper", which is included as Appendix C at the back.)

ACCESS AND ACCREDITATION

A comprehensive "Accreditation Policy Paper" (Appendix D) should be produced early on by the Logistics division, and be made available to every participating country. This paper should outline the accreditation process clearly and contain a detailed chart setting out access limitations and rules for each site.

In designing the passes, or identification badges, a determined effort should be made to keep the number of different categories and styles to a minimum. The passes must be easy to read, (ie. easy for those responsible for access control to discern the identity of the bearer and to what areas they are entitled access), as well as being attractive and of an appropriate size.

For the principal participants, attractive special lapel pins, in lieu of identification badges and passes, can double as mementos of the summit. Most of the VIPs will be easily recognized persons, but it would be wise to circulate their photos to security and other staff controlling access to ensure that an embarrassing incident does not occur.

The accreditation process should be fully understood by all parts of the Task Force. Once the security "sweep" (ie. the room-by-room search and examination prior to security take-over) is done, no one can enter the site without the necessary accreditation. If some Task Force personnel have not even applied for accreditation, a potentially serious hold-up could occur.

The formal accreditation and access system should not be confused with the possible need for "controlled entry" to meeting sites by contractors and suppliers before the accreditation system comes into force. The Conference and Site Preparations division should work with the security authorities in organizing and enforcing "controlled entry" separate from the accreditation process.

Staffing:

The accommodation/accreditation manager will need an assistant manager for accreditation at least three months prior to the summit. While in the early planning

stages one manager can handle both accommodation and accreditation, closer to the summit each section must be supervised by a dedicated manager.

The Accreditation Centre:

Even with the best of efforts to get accreditations completed in advance, organizers should always expect a last minute rush for accreditation. The magnitude of accreditation requirements (eg. suppliers, service staff) can also exceed expectations, even with the most careful advance planning. To ensure that this situation is handled with ease, the accreditation facility should be up and running at least three weeks prior to the opening.

The central accreditation centre should be large, airy, efficiently organized, and well-enough equipped and staffed to handle the unexpected, including a rush on the centre. The power supply to the centre must be sufficient to handle the equipment, with a back-up supply available, especially if the centre is a temporary structure constructed for the purpose. There should be plenty of parking nearby, and easy access to public transport.

Distribution of Passes:

A system for earlier distribution of some categories of ID badges should be implemented if organizers are at all concerned about possible last minute congestion in the accreditation process. Organizers should be confident, however, that the passes will be securely held until needed, to guard against the danger of copying or forgery. Passes should be distributed through:

1. the liaison officers to delegations
2. the individual accreditation centres in the hotels (if prearranged with the delegations or media)
3. the central accreditation centre

Members of the Security division must participate in the drafting of the Accreditation Policy, and monitor the creation and distribution of passes. It would be

advantageous to have each accreditation office equipped with two or three copies of Security's accreditation print-out, or with two computer terminals connected to Security's data bank against which names can be checked prior to issuing I.D. cards.

Access During the Summit:

All members of the Security force, as well as those non-security persons charged with controlling access to meeting zones, should be carefully briefed on the identification and access system. A central point of contact must be available where they can refer instantly for decisions on individual situations.

There will probably be a need to distinguish between accreditation and access. While accreditation passes are issued to all accredited participants of the summit it may become necessary to restrict access to certain locations, or additional sites, (eg. meeting rooms, VIP offices, and hospitality locations). Access policies must be created and outlined clearly in the Accreditation Paper. If necessary, additional "overpasses" allowing access into these specific areas/sites should be produced and distributed, usually through the liaison officers.

MEDIA REQUIREMENTS

THE ROLE OF THE MEDIA

The role of the media will vary depending on the size and significance of the summit. Obviously, the media's role and presence are considerably greater during a major international summit, and will therefore require the addition of a major **Media Facilities and Services** division within the Organizing Task Force.

The mandate of this division is to provide the appropriate services and facilities to enable the media to cover the event effectively. Working with all the other Task Force divisions, and with the Host Broadcaster unit, the section provides the media centre and facilities, arranges accommodation and accreditation for the media, and assembles and distributes the press kits and information packages. It is also its responsibility to provide fair and reasonable access to the various parts of the programme to all participating media, through pools and media events, without compromising any of the security or logistical arrangements in place.

WHERE SHOULD THE MEDIA CENTRE BE LOCATED?

An all-inclusive meeting and media facility offers tremendous convenience for delegations, media and organizers alike. It can help create a sense of 'family' and common purpose among the delegates, media and organizers, which can make a difference in the resulting news coverage. The media seems to prefer having the on-site proximity to the meeting areas, despite the extra security hassle which results from being within the outer security perimeter. The proximity for briefers to the media centre means that the facilities can be well used and the media can better cover the arrivals and departures of the VIPs.

While an effort should therefore be made to have the media centre located at the main meeting site, the level of security within the meeting site (ie. between the main meeting rooms/delegation offices and the media centre) will have to be greater than it would be if for delegates only. It is essential that organizers and security officials cooperate fully to work out the necessary perimeter and iron out access problems as early as possible in the planning stages.

Both delegates and media alike should be made to feel that they have access to as much of the meeting site as possible, without too many unnecessary security "check-points". The design of the main meeting site will have to be well thought out, so that the result is definitely a feeling of "family", and not of "your side ... my side".

MEDIA CENTRE

The manager of the Media Centre section is responsible for the design, construction, fit-out and furnishing of the media centre. Included in his/her mandate is the:

1. management of the media facilities budget, reporting to the Director of the **Media Services and Facilities** division
2. assignment of space within the Centre to the participating media organizations, and of briefing rooms to delegations
3. coordination of the food and beverage services for the media.

A large counter should be strategically located, near the main entrance, providing information and offering a number of key services (ie. photocopying, courier service, lost and found, checkroom, etc.). A complete photo service, with developing/redeveloping capabilities, could also be provided within this area. (In the Canadian experience, this service was supplied by the **Department of National Defence**.)

Television monitors should be placed around the media centre (and delegates lounge) to enable journalists (and delegates) to see the Host Broadcaster feed. A second set of monitors could carry a closed circuit message channel, thus providing a prompt and effective means of disseminating information concerning program changes and/or upcoming briefings to both media and delegates.

There are potentially four work areas within a media centre for a major summit:

1. **PRINT WORK AREA** - work stations (table and chairs) for journalists with telephones equipped with modular plugs for connection to user equipment. These stations usually operate on a first come-first serve basis. However, agencies can request exclusive space, but are then responsible for installing their own phone and data lines. Also located here, are the radio booths with telephones equipped with acoustic couplers.

2. **ELECTRONIC WORK AREA** - radio studios, television studios, master control, edit suites, and offices. (See Appendix A - "Statistics" for actual numbers offered in previous summits.) Because of the need for soundproofing, actual drywall construction is required in this area, as well as carpeting on the floor.

3. **BRIEFING ROOMS/PRESS ROOMS** - if required, each delegation (or group of delegations) can be provided with press offices, equipped with desks and chairs, telephones and television monitors, and/or briefing rooms, equipped with tables, chairs, risers, backdrop (summit flag/logo), microphones, multifeed boxes and a television monitor. Any additional requirements can be the responsibility of the delegation.

4. **FOOD AND BEVERAGE SERVICES** - Summit organizers should provide, on location, some type of food and beverage services. The decision on whether or not to charge for these services should be made very early on and potential participants informed as soon as possible, ideally through the Media Aide Memoire.

Summit organizers might involve municipal governments in hosting major meetings, by inviting them to provide a complimentary food facility for the media. This responds directly to the main local interest in attracting media interest, and can result in very considerable cost savings for the Host government.

A perfect example of this example was the "Summit Square" facility at the Economic Summit in Toronto, in June 1988. It set high standards for media hospitality and service, and fostered international media attention in a uniquely positive cooperative experiment among governments (led by the municipality of Metropolitan Toronto and with the Province of Ontario) and the private sector.

ACCOMMODATION AND ACCREDITATION FOR THE MEDIA

The mandate of the Accommodation and Accreditation section within the **Media Facilities and Services** division is to:

1. design, print and distribute the accreditation forms
2. manage the accreditation process
3. hire and train the personnel for the division
4. reserve all hotel rooms for the media
5. design, print and distribute accommodation registration forms
6. manage the accommodation reservation system.

This section is naturally divided into the two areas, Accreditation and Accommodation, each headed by an assistant manager.

Accreditation:

The accreditation notices should be sent out to the national and international media, if possible, around three months prior to the summit, and included in the Media Aide Memoire. International media can be reached through the summit country embassies in the host's capital, and through the Host missions abroad. The forms can be returned via these embassies or directly to the Summit office.

By placing the deadline of one month prior to the summit for receipt of the forms, the majority of the accreditation forms will be received on time. A decision not to process applications for accreditation once the summit officially begins should be made well in advance and widely publicized in the initial accreditation notice.

This section should work very closely with the Accreditation section within the Logistics division. The "Accreditation Paper", (Appendix D), should apply to media accreditation procedures as well.

The media should be asked to supply two passport size photographs at the time of application, so as to facilitate the advance production of the media accreditation passes. This is essential since the numbers of participating media are most likely going

to be far too numerous to permit production of passes on arrival. The completed badges can be picked-up at the Accreditation centre located close to the Media Centre.

Since all participating media will not be allowed to attend every summit event (due to space, security, and/or programme restrictions), media "pool passes" will be required to control access to various sites. Each delegation will be entitled to a certain number of "pool passes", which can be distributed according to the number of media attending from each country. Delegations should normally be responsible for distributing these passes to their own media. Smaller media groups and media from non-participating countries can receive their passes directly from the media accommodation and accreditation manager.

Accommodation:

Accommodation for participating media should be reserved approximately one year in advance. It is almost impossible at this time to know what numbers will attend the summit; however, an over-generous estimate should be made and rooms blocked off. They can always be released later.

To prevent the Host from being charged for empty rooms, organizers might attempt, early in the negotiations with the participating countries, to make each delegation responsible for any media 'no-show'. Alternatively, the manager could contact certain hotels, negotiate a favourable rate and simply advise participating media to contact the hotel directly. In the event of a shortage of rooms, a hotel consortium could be requested to set up and manage a media housing bureau.

The mandate of the Media Accommodation section is to reserve all hotel rooms for the media. The assistant manager for Accommodation should assign the individual hotel rooms and maintain the registry and files. As with the delegate accommodation, the assignment of rooms can be a challenge. This is another reason why the accommodation registration form in the Media Aide Memoire should be as complete and clear as possible.

MEDIA INFORMATION AND SERVICES

The manager of this section is responsible for the writing and delivery of media information, the management of the media relations officers programme, and the handling of media logistics.

Information:

Within the mandate of this section is the production of the Media Handbook, the Media Programme and the Media Relations Officer Manual. This includes all the writing, gathering of editorial content, translation, and proofreading. This should be done, however, in consultation with the printing coordinator in the Public Affairs unit, who handles the actual publication of the material.

A brief description of each of these handbooks, programmes and manuals can be found in Appendix E - "Publications".

It should be noted that the requirement for handbooks and media kits always exceeds the media accreditation numbers by at least one half. There is no easy or efficient method of strictly controlling numbers of items distributed to the media; in the long run, it is easier to supply the extra demand than to try to maintain control.

Media Relations Officers:

The Media Relations Officers Programme is a comprehensive programme covering the recruiting, hiring and training of the Media Relations Officers, whose prime responsibility it is to act as a conduit for information to media at airports, hotels, the media centre and other sites. These officers can also act as media pool escorts, media bus dispatchers or liaison officers for the national press offices.

Hiring Media Relations Officers locally can be one effective way of involving local people in the summit. Approximately two months in advance of the summit, notices asking for applications can be posted at the local universities, colleges and other appropriate locations. An additional source of the Media Relations Officers is officer staff at host government embassies in the summit countries. These individuals would be well placed for advance liaison with national press offices.

The applications should be very precise about the requirements of the positions and working conditions, (eg. hours, security requirements, etc.) to help control the number of applications received. If there is a language requirement, it should be clearly noted on the application form. The interviewing schedule, accreditation process, and actual hiring of these officers can take longer than expected if many applications are received.

The officers should be brought on staff at the latest, one week before the opening of the conference, so that they can be sufficiently trained prior to the arrival of the media corps. The Media Relations Officers become a vital element in the communication linkage between the summit organizers and the media. Well-trained officers can make a difference in the way the media perceives the quality of organization of the summit.

Logistics:

A media logistics officer should be hired approximately two months prior to the event to coordinate the movements of the media to and from all summit sites. This officer is responsible for the:

1. design and direction of the media logistics at each event
2. production of the media scenarios
3. supervision of the Media Relations Officer(s) at each media event
4. design of the media transportation plan, working with the Logistics division

These responsibilities include the scheduling of media buses, and the ordering of risers, ropes and stanchions for all venues (through the Conference Facilities section).

All of these responsibilities require that the Media Logistics Officer to work closely with event managers, security officers, and with the Host Broadcaster. During the summit, at least two Media Relations Officers should accompany media to each site, and each media bus should have a security liaison officer present.

The size of the media pool at each event is determined by the director of the Media Facilities and Services division, working with the logistics officer, who will develop some formula for determining how many media persons from each country can participate. Once the number of media spots at each site is determined, the decision is then possible on how many from each delegation can participate. Passes are distributed just prior to the event.

THE HOST BROADCASTER

HOST BROADCASTER

An essential adjunct of the **Media Facilities and Services** division is the **Host Broadcaster** unit, whose services can be invaluable to the visiting electronic media. Competent and worry-free Host Broadcaster services should be integral to any summit. The expertise of the Host Broadcaster personnel can make the difference between a "good summit" and a "great summit" in the eyes of the public, as seen through the media.

The Host Broadcaster agreement should be signed as early as possible in the preparatory phase. The Host Broadcaster becomes a vital part of every group, from the facilities planning to the event/movement planning. The Host Broadcaster should be a key player in stage managing the movements of the VIPs throughout the entire summit programme.

The mandate of the Host Broadcaster is to:

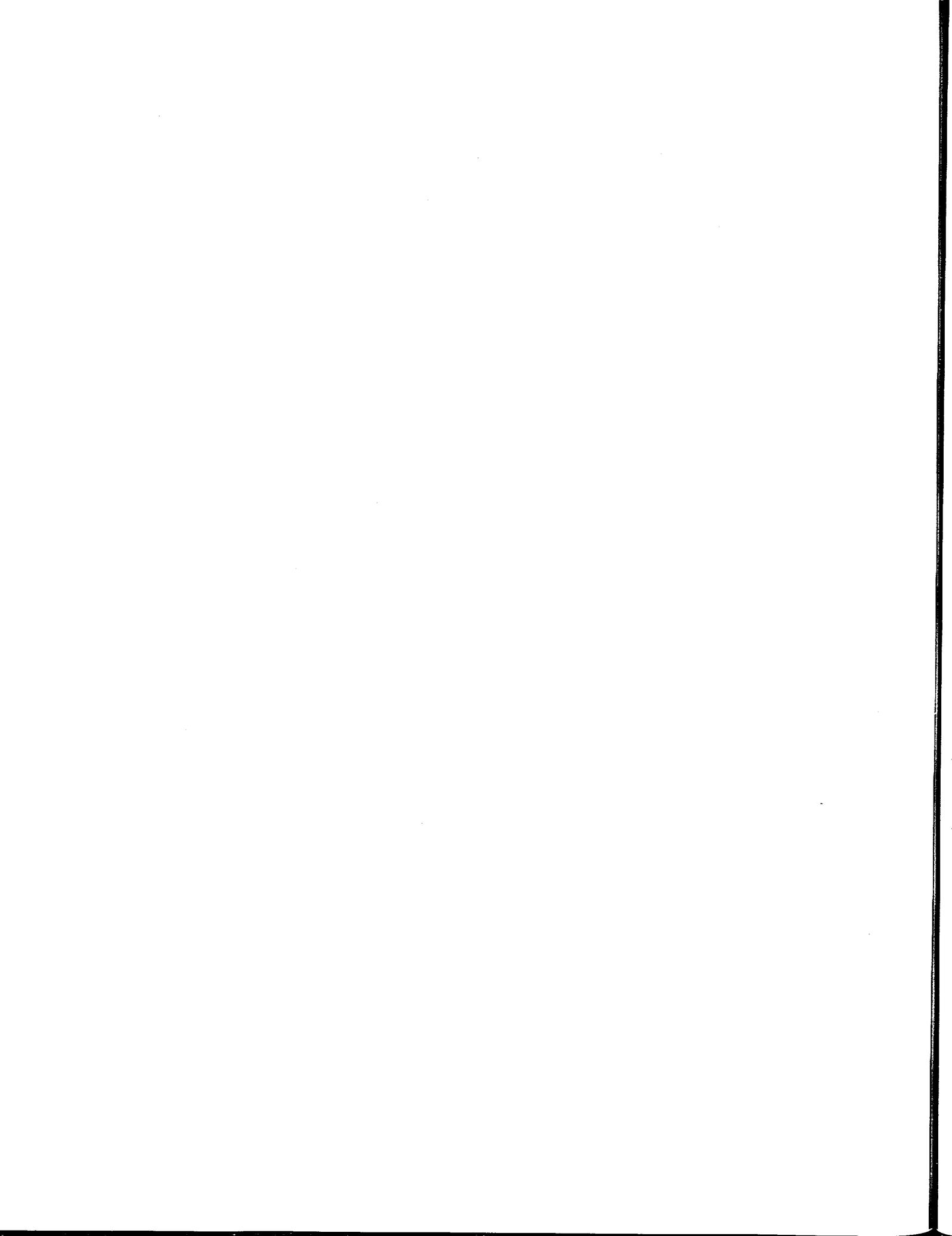
1. provide pictures and sounds of the summit events to accredited broadcasters
2. provide television studios, radio studios, radio/television master control, electronic field production crews and equipped television edit suites.

The Host Broadcaster must work very closely with both the **Media** and the **Conference and Site Preparations** divisions designing their area within the media centre. In estimating the requirements of participating media it is vital that there be close and early communication with visiting networks/media around the world. The number and kinds of basic facilities being offered by the host should be clearly set out from the beginning so that the costs of any additional requests can be, if necessary, charged to the requesting organization.

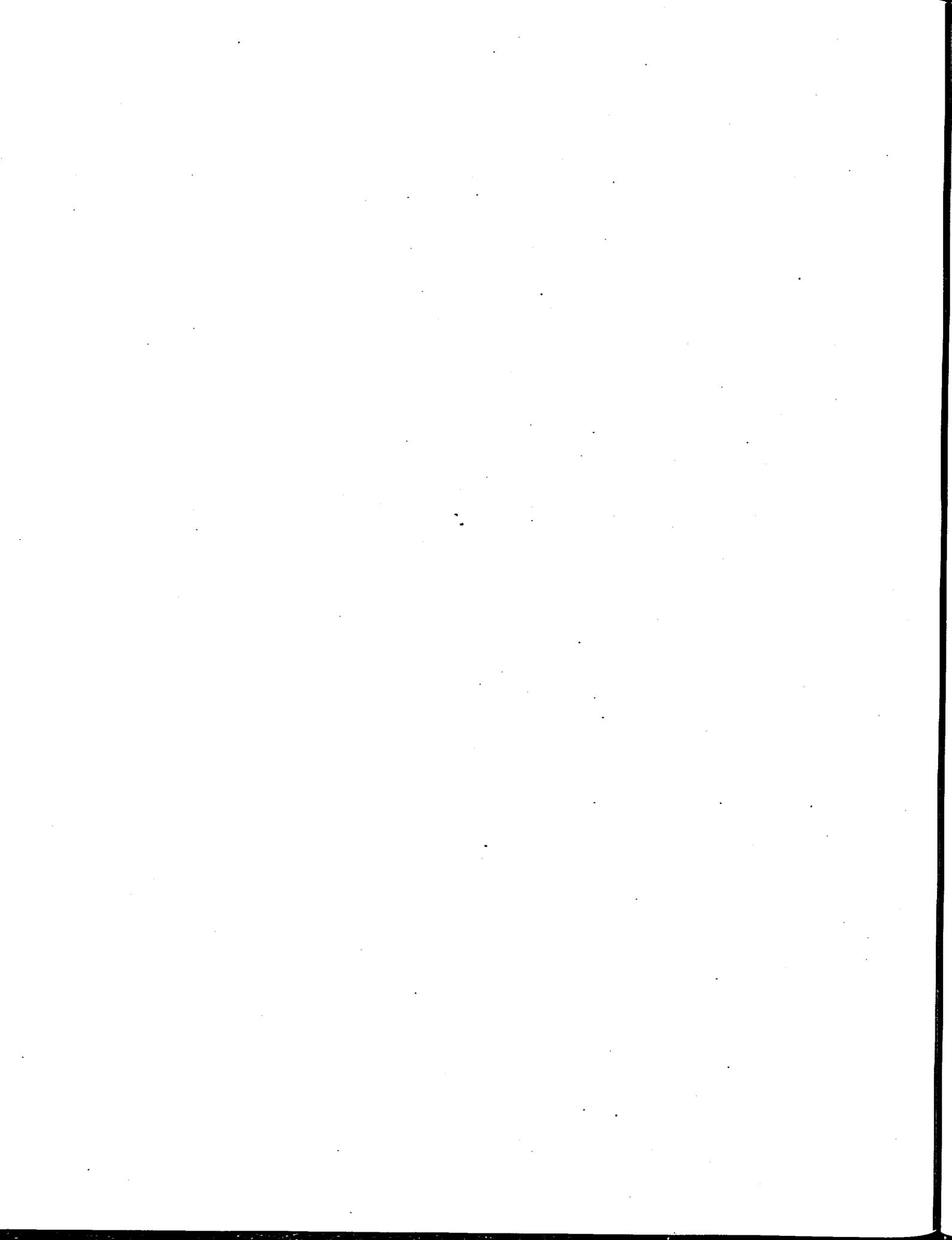
All technical requirements must be discussed thoroughly and included in the design, so that the construction phase, runs as smoothly and free from costly and delaying "add-ons".

If there are heavy security arrangements around the Summit, it might become necessary to attach a member of the Security division to the Host Broadcaster unit. This will result in better communications and smoother operations.

It is also the Host Broadcaster who coordinates the message channel facility mentioned in the chapter on the "Media Centre". This channel would include programme announcements and/or changes, broadcast feed announcements, and updates. A system must be in place through the Operations Centre so that those Host Broadcaster personnel responsible for the message channel in the Media Centre can receive changes/announcements as soon as they occur.



THE TRANSITIONAL PHASE



THE TRANSITION TO OPERATIONAL THINKING

As the date of the summit nears, the Executive Director must see to it that preparations take place increasingly along dynamic event-focussed lines. This is why the "scenario reviews" and "dry-runs" become so important. They give considerable insight into the state of operational preparedness. It is very important for the Executive Director to be involved with these reviews, as it enables him/her to see which sections and/or events are proceeding well, and which areas may need personal attention. He/she must also be prepared to deal with the changing operational environment, as the pressures mount and as time frames for action and decision-making shorten. (The next chapter will deal with the phases of organization in greater detail.)

In the preparatory phase, decisions are taken methodically (ie. investigating options, making decisions, issuing contracts, etc.). However, as the event approaches, there is less time for lengthy directors' meetings and the careful examination of options.

Some personnel might have difficulty adapting to the faster pace and the need for faster decision-making on their part. The Executive Director needs to recognize who might have this difficulty and intercede to help.

As the summit draws near, the organizers will be concentrating so much on the holding of the summit, and on the facilities and separate events, that preparations for the winding down of the summit operation and closure of the office are often overlooked. Senior management must therefore ensure that some time is taken during this transitional phase to concentrate on what will happen when the last participant leaves town.

If the summit is located in the capital region, the closing of the summit office can wait until the last report is written. However, if the summit is held outside of the capital, thought will have to be given as to when the staff and office equipment can be released. Most out-of-town summit personnel will be anxious to return home, especially after the long hours prior to and during the summit. The Finance and Administration division should make particularly sure that all directors focus on administrative requirements after the summit, especially with regard to support staff, office equipment and supplies, and contracted services.

PHASE IN OF EVENT MANAGEMENT

Why is Event Management necessary ?

The organization of a major summit has three distinct phases: preparatory, transitional and operational. During much of the preparatory phase, organizers tend to see the summit as a fixed object on the time horizon, rather than a dynamic event. Moreover, the Task Force divisions are organized on a basis which emphasizes functional or vertical preparations: ie. logistics, security, media, conference facilities, and so on.

Therefore, during the preparatory phase, the Executive Director must make a conscious effort to plan for the eventual dynamic and time-driven nature of the summit. He/she must design and begin to put in place a system for managing the summit as a series of inter-connected events, and during the transitional phase (the 4 to 6 week period before the summit) shift over completely to it. This ensures that all parts of the Task Force are then prepared for the operational phase of the summit.

The only way to achieve total coordination of all services and activities within each event is to have one person visualizing the event in its entirety. As the planning progresses in the preparatory phase, problems or requirements can surface which do not fall under any one division's mandate. Under the event management system these problems or requirements stand a better chance of being identified and resolved. This system also enables organizers during the transitional phase to double-check that all vertical preparations for each event are complete and fully coordinated.

Moving to Event Management

Managers for each event in the summit programme should be designated early in the preparatory phase. These event managers should be senior enough to work with directors and to exercise authority during the summit. They also assist the Senior Manager, Plans and Programmes, in the design, coordination, and carrying out of the overall programme.

Initially they monitor the various functional preparations relevant to their event, ensure coordination and act as a focal point for all information concerning the event and its site. The event manager's role in working with directors in shaping and coordinating

all event preparations will gradually increase as the dimensions and various components of the event become clearer. Budgetary authority remains throughout with the functional directors.

At some point a decision will need to be made, with respect to each event, to initiate the event management system. This should be done by the Executive Director, in consultation with the directors and the Manager, Plans and Programmes. An event which requires an intense amount of detailed work in advance by many sections (ie. a "live production", such as an Opening or Closing Ceremony) should be assigned early on to an event manager and a working group. On the other hand, management of a minor event, or management of a main meeting site which requires an immense amount of detailed work primarily by one section (ie. Conference and Site Preparations), need not proceed to event management format until much later.

As each decision is made to make the transition from the "functional" preparations to the event management system, an event working group will need to be established. It will be comprised of members from each of the divisions in the Task Force, under the direction of the event manager. This working group would then report to, and receive instructions from, the Executive Director and directors at the weekly coordination meetings.

During the transitional phase these meetings become:

1. "production meetings" to review the preparations, direct further work, and solve more difficult problems
2. "programme planning meetings" to view the events within the context of the overall programme
3. "coordination meetings" to ensure that directions given to staff under the auspices of event management are consistent with the direction given by Directors along functional lines.

There is bound to be some resistance within the system as functional management gives up its primacy of place to the event manager. This should be minimized if it is understood from the beginning that this shift is to happen.

The Work of the Event Manager

The amount of preparation and organization required will vary from event to event depending on differences in locations, make-up of the participants, and the nature of the event.

Many preparatory steps will be common to all events. It is the responsibility of the event manager, together with the working group, to make sure that the following tasks are completed:

1. letter of confirmation sent to the site and letter of agreement signed
2. all security, "fit-up", hospitality, transportation, media and logistical requirements identified and arrangements completed.
3. detailed event scenario planned and prepared
4. spending authorities have been obtained to cover all costs (especially those incurred at the last minute) from the appropriate divisional directors
5. guest list/invitation requirements identified and implemented

Event Managers should give attention to several rules of thumb as they plan their scenarios:

1. the numbers of people at the site should be kept to a minimum; essential staff and agreed delegation representatives
2. movements should be kept as uncomplicated as possible, both on arrival/departure (motorcades) and during events
3. nothing can replace the on-site walk-through for establishing timings, identifying any space constraints, gauging people-flows, and so on

SCENARIO REVIEWS AND DRY-RUNS

The Scenario Review:

No matter how thorough the preparations, there are always going to be areas overlooked during the planning process. This is why the "scenario reviews" and "dry runs" are an important part of the transitional phase. The **scenario review** is a method of "cross-checking" planning and organization done to date, with all divisions present in a round-table format. It is an opportunity for staff members involved in one event to see and hear how other events are taking shape and how they relate to his/her own event work, and how each event fits in the context of the overall summit programme.

Full participation is critical to the success of the scenario review. Problems and/or omissions in preparations can only be acted upon if they are discovered in time. Up until this review, there still could be staff responsible for a crucial part of summit planning who have not had the opportunity or time to focus in detail on each event and their responsibilities with respect to it. The **scenario review** provides an opportunity for all sections to "double-check" their inputs to each event.

It is advisable that there be two scenario reviews. The first review examines the functional preparations relevant to each event: facilities, services, transport, media arrangements, etc.. It should be held five or six weeks ahead of the summit. Planning must be far enough advanced to allow each participant to visualize each event. Most of the problems and/or omissions in functional preparations will be discovered during this review, while there is still enough time for remedial action and changes.

A second scenario review gives organizers the opportunity to examine operational preparations for each event in the programme. It is best scheduled three weeks after the first review, or around two weeks ahead of the event (the deadline for the publication of the Scenario Book must be considered). The purpose of this review is to examine the entire summit, from beginning to end, as a series of events, movements and actions. Supporting activities are carefully reviewed: eg. what staff are involved, where are they located, who communicates with whom, etc.. The events are "fine-tuned", and the scenarios are refined and readied for publication.

The Dry Run:

The "dry run" is an opportunity for each event manager to run-through, on-site, the event scenario with all of the Task Force players involved. Those responsible for motorcades and VIP security should be in attendance. It can be the first time that all participants have been on-site at the same time.

The decision about the timing for the "dry runs" should be made at the time of the first scenario review. It is best if they are completed prior to the last review and the finalization of the scenarios.

During the "dry run", points are clarified and small problems corrected, but the real value behind the run-through is later discovered when questions are asked during the final scenario review.

LIAISON OFFICERS IN PLACE

With Liaison Officers recruited and thoroughly trained, (see the chapter on "The Liaison Function"), they take their places as the Task Force's chief contacts with visiting VIPs and their delegations in the final days before the summit begins.

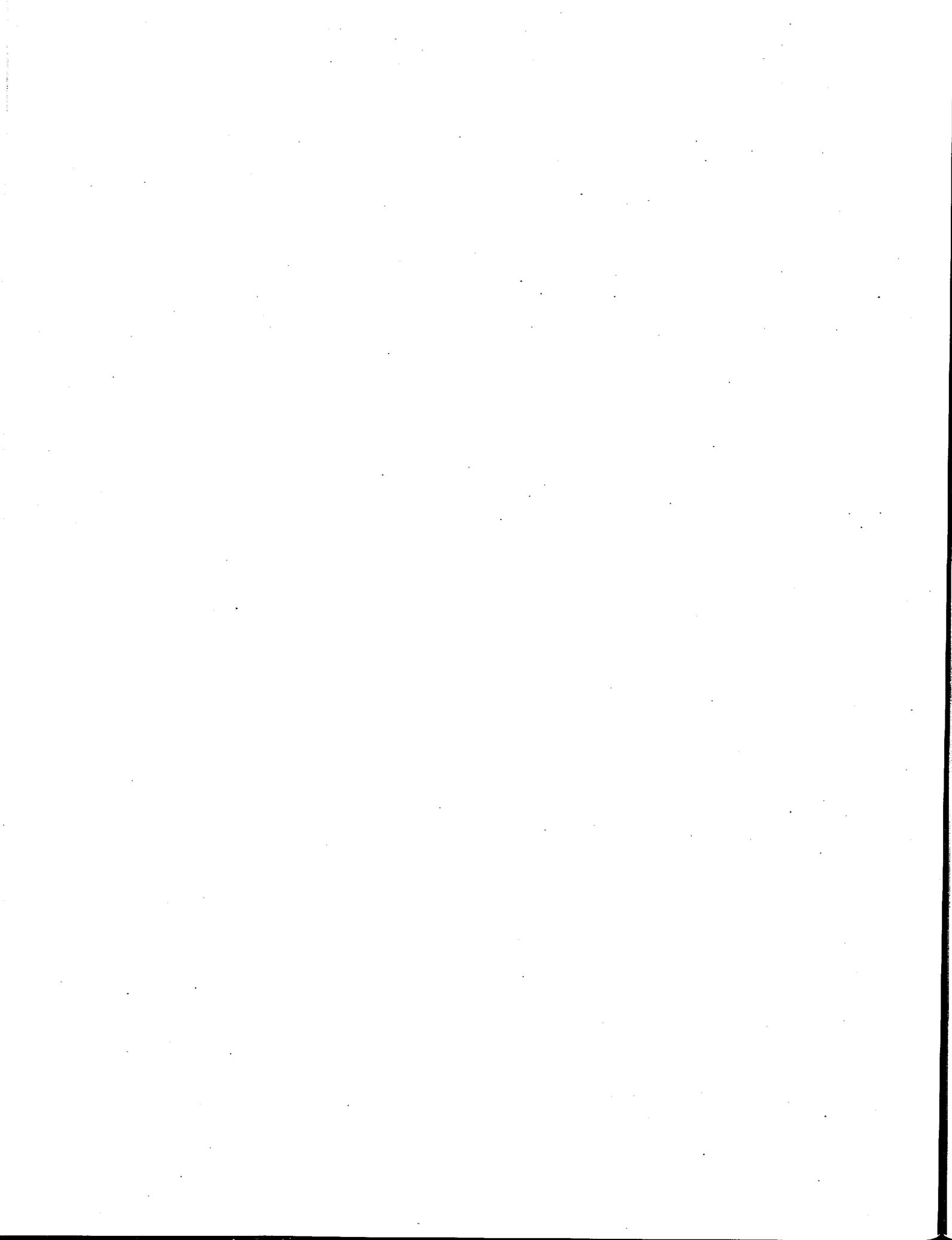
During the summit, the Liaison Officer's overall responsibility is to ensure that the Host retains operational control of the summit.

To this end, the Liaison Officer is specifically responsible for the following:

1. meeting their assigned VIP upon arrival at the airport, and determining who, on the arriving delegation is their point of contact for assisting with clearance formalities
2. ensuring that the VIP's party is in order for motorcade, escort to hotel, and the introductions to the manager of hotel, if appropriate, and escorting to suite and ensuring all accreditation procedures are completed
3. obtaining a complete list of names and titles of members of the delegation and conveying these to the Operations centre
4. ensuring that the VIP is briefed on the programme, facilities and services for the summit
5. escorting the assigned VIP to all events, ensuring that scenarios are closely followed, and remaining in close proximity to the VIP at all times
6. keeping the Operations centre informed if the VIP is unable to attend any event or is going to be late, as well as informing the Ops centre of any additional or unscheduled activities by the VIP
7. maintaining continuous contact with the Operations centre and keeping the VIP fully informed of changes in programme and other arrangements.

8. obtaining information, seeking appointments and visits for the assigned VIP
9. through the Operations centre, consulting the Deputy of Liaison in the event of any difficult request or complaints
10. maintaining a close working relationship with the security officer assigned to the VIP
11. ensuring that the VIP can reach them at all times
12. arranging transportation as required
13. briefing the VIP on all departure arrangements (timing, baggage, etc.) confirming all arrangements are in place, and accompanying the VIP to the airport for departure.

THE OPERATIONAL PHASE



OPERATIONAL PHASE

The operational phase of the summit will usually proceed largely as planned if the preparations have been thorough.

There will always be some last minute changes made to the programme, and this requires that organizers be very flexible. Close communications between all divisions is critical (see following section on the "Operations Centre") in order to ensure that everyone is aware of any changes.

The summit will appear to "run itself". The Executive Director should not take on any specific logistical or protocol tasks. He/she should be available at all sites where the VIPs are present to respond to particular instructions from the Host, and to solve on-the-spot problems if required. It is best if the programme manager is also on hand to act as an interface with the event manager, who, in turn, runs the event 'hands-on'.

The director of the Security division should also be present on-site so as to be ready to respond to any serious security matter, if indeed one should occur. This arrangement also permits ongoing direct communication with the Executive Director.

During the summit, the Executive Director would normally hold directors' meetings very early each day (eg. 0530 - 0600 hours) for a last-minute review of the day's events and to solve any last minute problems.

OPERATIONS CENTRE

Once the summit begins, the Operations Centre (Ops Centre) is the nerve centre of the summit, passing instructions and information through the system. It brings together representatives of each functional area, monitors continuously organizational preparedness and the unfolding of each event. It serves as the focal point for all information. Under the direction of a Senior Ops officer, the centre handles problems that arise and do not need the attention of the Executive Director.

If a local problem arises that cannot be solved 'on-the-spot', it is referred to the Ops Centre where the Senior Ops officer takes action. If a serious problem arises, the Senior Ops officer uses his/her judgement as to whether or not to consult the Executive Director, who should be in radio contact with the Ops Centre at all times.

The potential for emergencies should not be under-estimated and the most careful preparation should be undertaken to ensure that procedures exist for handling emergencies. The "scenario review" probably offers the best opportunity for the organizers to think of possible emergency situations and to develop and acquaint staff with responsive procedures. Persons staffing each of the functional desks need to know what the procedures are even if they are not expected to be involved. They must also be senior enough to make 'on-the-spot' decisions affecting their sections.

Considerable time and effort should be invested on the design of an effective Operations Centre, and in acquainting all staff with its activity and procedures. The 'scenario reviews' and 'dry-runs' are key to the eventual smooth running of the operations centre, and Ops centre personnel should be involved in them.

The detailed plan for the operations network should be set out in an Operations Manual. Every division should be represented by an experienced staff member in the Operations Centre. Rosters for shift work, and "quiet hours" coverage will need to be developed. The Liaison and Logistics desks usually have a high level of activity. The person responsible for the Scenario Book, and who probably knows more about each scenario than anyone else, is probably the best candidate for manning the Plans and Programmes desk.

The Operations Centre should contain the following desks:

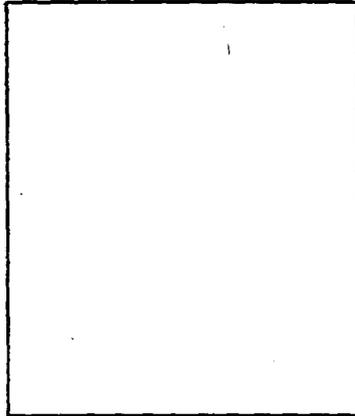
Senior Operations Officer

Plans and Programmes

Security

Logistics

Delegation Liaison



Telecommunications

Media

Special Events

Emergency Planning

Conference/Site Preparations

Access to the Operations Centre should be on a "need-to-be-there" basis. The security staff should be fully briefed and given the authority to deny access.

To be effective the Operations Centre should employ a range of communications systems linking it both to teams in the field (logistics, liaison, media, conference facilities, security) and to other subsidiary Ops Centres. Depending on the summit, there could be a need to provide subsidiary Ops Centres at the airport for the arrivals/departures, at a retreat site, or at any additional meeting/hospitality site(s). The various communications systems (telephones, hot lines, radios, and pagers) are described in the chapter on "Communications".

SOME INDIVIDUAL ROLES DURING THE SUMMIT

The roles played by the **Executive Director** and the head of **Security** are described in the introduction to this section of the handbook (page 107).

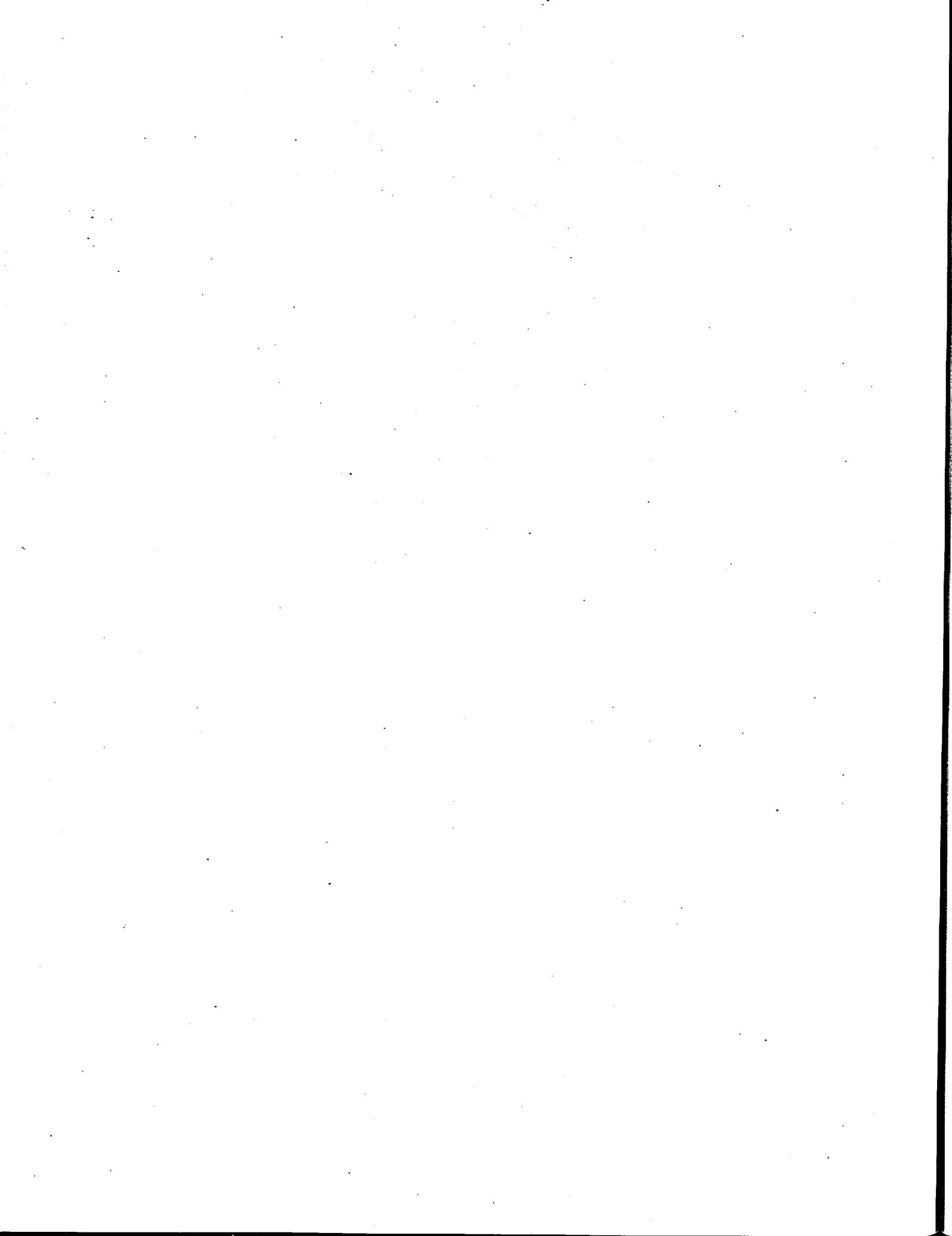
Each of the divisional directors would normally continue to ensure the smooth functioning of their own areas. Event managers will concentrate on their assigned events. In some instances, a director may be able to take on an additional responsibility during the summit; such as shift duty as the Senior Ops officer or as an Event Manager. They would still, however, remain in close contact with their sections through the Operations Centre, and meet with the other directors at the early morning directors' meeting.

The relationship between the **Plans and Programme** senior manager and each event manager will vary with each event. In most cases, the event manager is the person coordinating the scenario and making sure all last-minute details are looked after. They must be on-site prior to the event. Event managers should have both the on-site security commander and a liaison officer close by so as to stay informed of all movements to and from the event.

The **Plans and Programme** senior manager moves from one event to the next, monitoring activity, assisting the event manager when needed, making sure that transitions from event to event go smoothly and that the entire programme remains coordinated. Once at an event site, he/she should float, with radio contact to the Main Ops Centre, to the event manager, and to the Executive Director, who is also on-site. The more complex the event, the more involved he/she may get, but usually closely attending to the movements of the VIPs.

As the summit unfolds, organizers must have the ability to notify each successive event of the progress of the current one. If meetings go on too long or schedules changed by the participants, a great many functions (motorcades, hospitality timings, etc.) can be seriously affected. With the radio system in place, and key decision makers in contact, adjustments can usually be made both quickly and smoothly.

WIND DOWN



RELEASING THE STAFF AND CLOSING THE OFFICE

If the move-out schedules are prepared in advance, and implemented as planned, it is always surprising how fast an active summit site can become empty, sometimes within a matter of hours. When the move-out is complete, most staff will be anxious to leave.

During the transitional period, the Executive Director, working closely with the **Administration** division, should focus management on the closure of the summit office. There should be a sufficient number of support staff on hand, with sufficient equipment and supplies to finish the Organizing Task Force's mandate.

In most cases, summit personnel can leave when their responsibilities are over. However, senior management should not regard their work complete until the last thank-you letter is signed, certificates of appreciation completed, invoices paid, and final reports written.

The Executive Director will also want to decide whether or not he/she will require any summit memorabilia saved before the office closes. Copies of all publications, summit flags, pins, operation manuals etc., are all examples of summit items which should be kept for future reference.

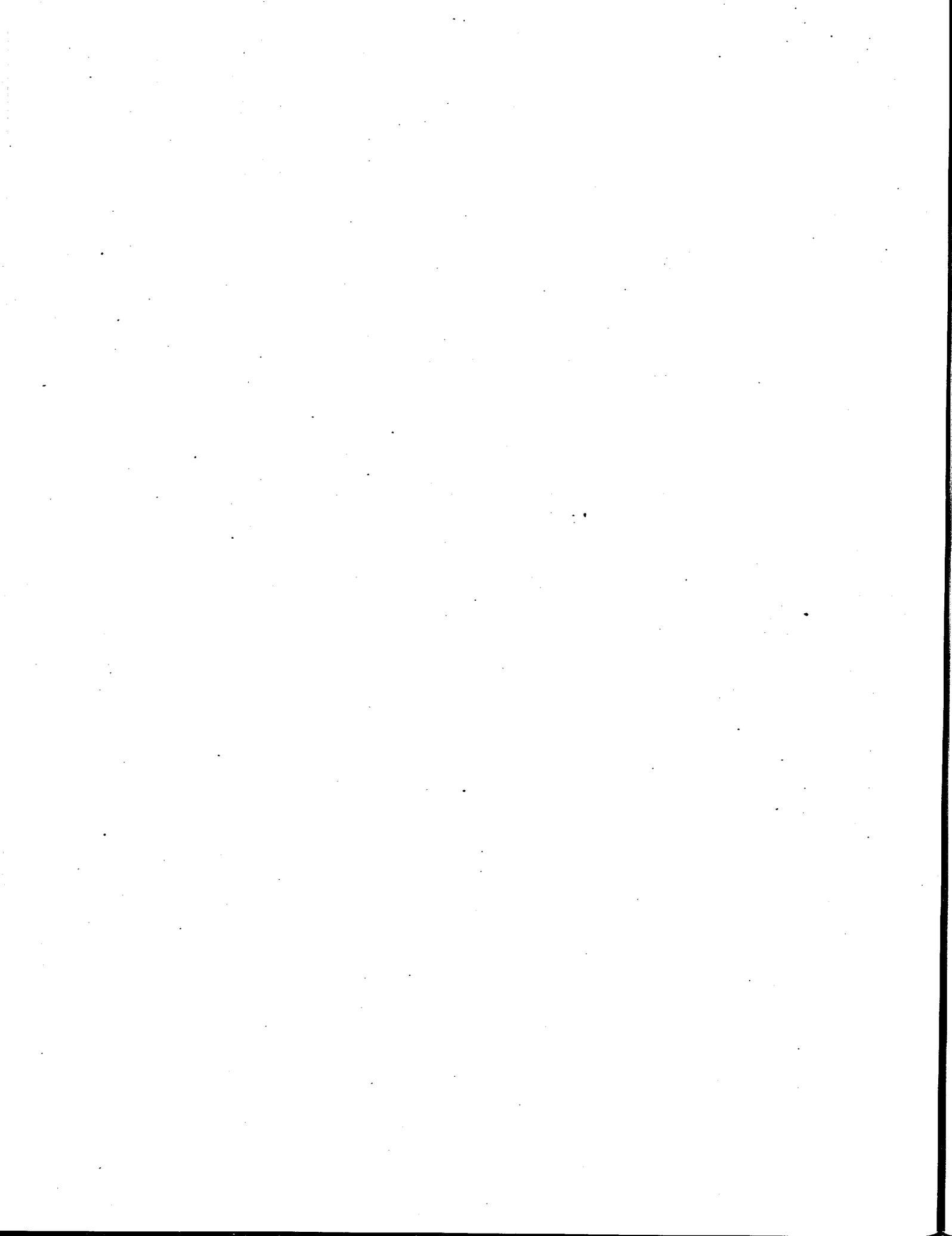
FINAL REPORTS WRITTEN

The last responsibility of the Organizing Task Force, often overlooked, is the writing and publication of a "Final Report".

Future summit organizers will be much further ahead if previous organizers have written a detailed report on the logistical arrangements required. Much time, effort and money are unnecessarily wasted by organizers "re-inventing the wheel", and making the same mistakes.

During the transitional phase the Executive Director should focus on the Report, decide how detailed it should be and who on staff should contribute, and establish a format for each contribution.

APPENDICES



APPENDIX A

COMPARATIVE STATISTICAL SUMMARY

QUEBEC CITY, VANCOUVER, TORONTO AND OTTAWA

| CATAGORY | QUEBEC | CHOGM | TORONTO | OTTAWA |
|--------------------------------|--------|--------|---------|--------|
| NO. OF PARTICIPATING COUNTRIES | 39 | 45 | 7 | 23 |
| NO. OF DELEGATIONS | 41 | 45 | 8 | 23 |
| NO. OF DELEGATES | 1,300 | 1,089 | 1,315 | 422 |
| NO. OF DELEGATION HOTELS | 7 | 4 | 6 | 3 |
| NO. OF SECURED SITES | 13 | 20 | 27 | 7 |
| NO. OF SECURITY PERSONNEL | 1,500 | 2,167 | 4,503 | 464 |
| NO. OF DND PERSONNEL | 1,100 | 1,000 | 760 | 50 |
| NO. OF STAFF | 200 | 700 | 627 | 187 |
| NO. OF VOLUNTEERS | 0 | 300 | 423 | 43 |
| NO. OF ACCREDITED PERSONS | 11,000 | 14,194 | 14,038 | 2,918 |
| NO. OF INVITED GUESTS | | 2,192 | 4,315 | 96 |
| NO. OF MEDIA | 786 | 1,138 | 3,060 | 677 |
| MEDIA | | | | |
| THEATRE SEATS | | 1,300 | 300 | |
| EDIT SUITES | | 3 | 104 | 30 |
| RADIO STUDIOS | | 4 | 20 | 3 |
| PRINT STATIONS | | 650 | 96 | |



External Affairs
Canada

Summits Management Office

Affaires extérieures
Canada

Bureau de gestion des sommets

APPENDIX B

AIDE-MEMOIRE

The attached document is presented to the Ottawa Missions of Economic Summit Countries to serve as an aide-memoire following the briefing on logistical arrangements for the Toronto Economic Summit held on Wednesday, January 20, 1988 at the Summits Management Office of External Affairs.

Ottawa, January 20, 1988

I N D E X

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SUMMARY

All logistic and organizational arrangements for the Toronto Economic Summit are the responsibility of the Summits Management Office of the Department of External Affairs. As host, the Canadian Government is responsible for providing the Conference Centre, security arrangements, hospitality including accommodation for those members of delegations who will be its guests, and the reservation and allocation of hotels for delegations and media generally.

All communications on logistics and organization matters should be directed to the Summits Management Office at the following address:

Summits Management Office (SMO)
Department of External Affairs
125 Sussex Drive
Ottawa, Ontario
K1A 0G2

Attention: Mr. L. Edwards, Executive Director

Telex No. 053-3502 (Answer back: SummitsOps)

Telephone: (613) 954-2240

Facsimile: (613) 954-7691

The following information should be forwarded to the Summits Management Office:

by 15th February 1988

- tentative arrival/departure dates and times for Head of Delegation aircraft and other dedicated aircraft
(Aide Memoire, Section 2)
- tentative accommodation and meeting/function space requirements (Aide Memoire, Section 3)
- telecommunications requirements
(Aide Memoire, Section 5)

by 1st April 1988

- preliminary list of delegates
(Aide Memoire, Section 3)
- medical and dietary information for Heads of Delegation, Ministers and where required, members of the delegation, Sherpas and Spouses.
(Aide Memoire, Section 7)

by 1st June

- final arrival/departure arrangements
(Aide Memoire, Section 2)

- final accommodation requirements
(Aide Memoire, Section 3)

- final list of delegates
(Aide Memoire, Section 3)

1. MEETING DATES AND VENUES

The 1988 Economic Summit will be held in Toronto from Sunday, June 19 to Tuesday, June 21, 1988. It will take place at the Metro Toronto Convention Centre (MTCC), a new facility in the centre of Toronto.

An official welcome by the Prime Minister of Canada will take place Sunday, June 19 at Nathan Phillips Square at Toronto City Hall.

Sites for working luncheons and dinners for Heads of State/Government, Finance Ministers and Ministers of Foreign Affairs will be communicated to Ottawa Missions of Economic Summit countries once governments have agreed on the program.

2. ARRIVALS AND DEPARTURES

a. Toronto Pearson International Airport

All arrivals and departures will take place through Pearson International Airport, Toronto. Dedicated aircraft will arrive and depart at pre-arranged intervals through a designated airline hangar at the Airport according to a schedule to be arranged between Ottawa Missions and the Summits Management Office. (National authorities are reminded to contact airline servicing agents directly to arrange appropriate local servicing, clearances and facilities).

Heads of State/Government and accompanying Ministers will be met and bid farewell at the Airport by a Canadian Minister. There will be no ceremony on arrival and departure. Transportation from the Pearson International Airport to Hotels will be provided to all delegates and media representatives arriving and departing on dedicated aircraft. Other delegates will be met and their entry into Canada facilitated by a Summits Management Office Protocol Officer. Advance parties and delegates travelling alone or in small groups are requested to make their own transportation arrangements from the Airport to their respective

hotels.

In order that arrival courtesies may be facilitated, Ottawa Missions of Economic Summit Countries are requested to provide to the Summits Management Office no later than 15th February, 1988, information on tentative travel arrangements, including likely arrival and departure times of Heads of State/Government aircraft and other dedicated aircraft, . In addition, Ottawa Missions are required to complete a detailed list of arrival and departure arrangements to be submitted to the Summits Management Office no later than 1st June 1988. Changes in travel plans, particularly of dedicated aircraft, should be notified promptly.

b. Baggage Tags

Baggage identification tags will be sent in advance through all Ottawa Missions of Economic Summit Countries to national delegations. Tags of a different colour will be used to distinguish the baggage of each delegation. Additional tags will be provided to identify the baggage of the Head of Delegation.

One member of each delegation, who will have overall

responsibility for delegation baggage travelling on dedicated aircraft, should be assigned to cooperate with Canadian Officials at all stages of the movement of baggage at the airport and from the airport to the hotel.

Departure arrangements will be the same, insofar as they may be relevant, as those which apply upon arrival. Plans for departure for Heads of Delegation, Ministers and Sherpas should be notified to the Summits Management Office well before the end of the meeting.

c. Entry Formalities

All members of delegations and media representatives must be in possession of a valid passport for entry into Canada. Visas are not required for nationals of Economic Summit Countries. Nationals of other countries should enquire to Canadian diplomatic missions on visa requirements.

Customs and Excise Forms "E-311" - will be sent to capitals in advance through Ottawa Missions of Economic Summit countries. These should be completed by all delegates travelling on dedicated aircraft for presentation, along with passports, to Customs

officials on arrival in Canada. Delegates arriving via commercial airlines will be provided with E311 forms by the airline prior to landing in Canada.

d. Health Requirements

There are no health certification requirements for persons arriving in Canada.

1. ACCOMMODATION/ACCREDITATION

a. Delegation Information

Ottawa Missions of Economic Summit Countries are requested to provide a preliminary list of delegates to the Summits Management Office not later than 1st April, 1988, with a final list being provided by 1 June, 1988.

b. Hotel Accommodation

The Canadian Government has reserved bedrooms and meeting/function space for all delegates, media and aircraft personnel on a block basis in the hotels listed below.

Because pressure on hotel accommodation in Toronto is severe, the Summits Management Office must make firm commitments regarding accommodation and meeting/function space well in advance of the Summit.

Although names of delegates, support and security staff, aircrew and media members may not be known, a note setting out as precisely as possible the number of rooms expected to be required in each category, as well as arrival/departure dates, should be sent to the Summits Management Office by 15th February, 1988. Missions should also send their meeting/function space

requirements by this date. Full and detailed lists, including names, will be required no later than 1st June, 1988.

The Canadian Government will allocate the suites and rooms listed in Section 3.C (Hospitality) below, for which as Host Government it is responsible.

Delegations and the Ottawa Missions of Economic Summit countries will be asked to assume responsibility for allocating the remaining accommodation within the reserved blocks in their respective hotels.

Delegation Hotels

| | |
|-----------------------------|-------------------------|
| USA | Royal York Hotel |
| France | Four Seasons Hotel |
| Great Britain | King Edward Hotel |
| Federal Republic of Germany | Sutton Place Hotel |
| Japan | Harbour Castle (Westin) |
| Italy | Harbour Castle (Westin) |
| European Community | King Edward Hotel |
| Canada | L'Hotel |

Media Hotels

In those case where delegations wish media to be accommodated in the same hotel as delegations, this request will be met wherever possible. For other media, reservations will be made by the Summits Management Office at the:

Hilton International

Holiday-Inn Downtown

Delta Chelsea Inn

Sheraton Centre

Loews Westbury Hotel

Crew Hotel

Hotel rooms have been reserved at the Constellation Hotel near the airport for aircraft crew and other personnel.

c. Hospitality

The Host government will offer the following hospitality to each delegation:

- i) one two-bedroom suite for each Head of Delegation and accompanying spouse, and
- ii) one one-bedroom suite for the Minister of Foreign Affairs and spouse and one one-bedroom suite for the Minister of Finance and spouse.
- iii) One executive suite for the Personal Representative (Sherpa) and spouse.
- iv) Eleven single rooms with bath for other members of each delegation in addition to those listed above.

This hospitality will include all normal meals, laundry services and local telephone calls. It does not include international telephone and telex charges, the consumption of alcoholic beverages, or extra meals.

The Canadian Government will assume the cost of hotel accommodation listed in section c. i-iv above from Saturday, June 18 to Tuesday, June 21 inclusive. Accommodation required prior to and after these dates, and expenses other than those offered by the Host government will be billed separately and will be the responsibility of the respective delegation.

d. Accreditation

Accreditation arrangements for delegations and media will include the issuing of photo identification badges to all delegates other than Heads of Government, Ministers who are members of the delegation, and Sherpas and their respective spouses. In addition to these identification badges, a pass system will be in effect which will control access to those areas used for meetings, delegation offices, media, and hospitality and special events. Identification badges and access passes will be made available to delegations on their arrival at their hotel. An Accreditation Centre for media and general use will be established outside the secure perimeter of the Metropolitan Toronto Convention Centre.

TRANSPORTATION

a. Official Delegation

Transportation will be provided for Heads of State/Government, Ministers of Foreign Affairs and Finance, and to delegations in accordance with past Summit practice.

The following transportation facilities will be allocated to each delegation:

- One limousine for the Head of Delegation driven by a member of the Royal Canadian Mounted Police (RCMP)
- One RCMP-driven sedan for the Foreign Minister.
- One RCMP-driven sedan for the Finance Minister.
- One RCMP-driven sedan for the spouse of the Head of Delegation (if applicable).
- Four sedans driven by members of the Canadian Forces.

Since all delegations will be housed at downtown core hotels, transportation time to and from the meeting site by motorcades will be approximately 5-10 minutes; by shuttle bus and dedicated car/driver, no more than 10-15 minutes (except during rush hour when travel between the Meeting Site and more distant hotels could take 15-20 minutes).

Travel time between Pearson International Airport and downtown Toronto is approximately 20 minutes by motorcade, and between 30-40 minutes by bus and car depending on traffic conditions.

b. Shuttle Bus Service

Regular shuttle services will operate between Saturday, June 18 and Tuesday, June 21 inclusive, from 07:00 to 23:00, between delegation hotels and the Meeting Site, as well as between media hotels and the Media Centre at the MTCC.

5. COMMUNICATIONS AND EQUIPMENT

a. Delegation Offices

Each delegation will be provided with office space to accommodate a limited number of delegation members and to facilitate communication with the restricted meeting rooms used by Heads of State/Government, Foreign and Finance Ministers.

In addition, each Head of State/Government will have a separate office close to the Meeting Rooms.

Study is being given to the proper outfitting of delegation offices and in particular to the question of communication between meeting rooms (principally that of the Heads) and the delegation offices, and between the latter and any delegation offices that may be established in delegation hotels. Arrangements and technology employed to permit Personal Representatives to communicate with their delegation offices will be as effective and efficient as any used at previous Summit meetings.

The telecommunication facilities which will be provided compare very favorably with those provided at previous Summits.

In each Delegation Office at the Meeting Site, the Host Government will provide three lines from the Canadian Government telephone system, one business telephone line (commercial), one Group Three category facsimile machine plus one line from the Government telephone system, the termination of the dedicated circuit from the Delegation hotel and one photocopier. On request, up to two word processors (IBM or Wang as the Delegation requires) can also be provided.

b. Delegation Hotels

The Host Government will provide each Head of Delegation at their hotel accommodation with one telephone connected to the Canadian Government telephone system, one business (commercial) line and a dedicated circuit (hot line) to the Delegation Office at the Meeting Site.

These facilities will be provided at Host Government expense, and will be located in or near the Head of Delegation accommodation according to the wishes of the

delegation. The provision of "hot lines" from Toronto to Summit Country Capitals may also be arranged at Delegation expense. In addition, each Delegation Hotel Office will be provided with four lines from the Government telephone system at Host Government expense.

All lines from the Government telephone system will allow unrestricted access, offering a no-cost Canada-wide calling capability. Calls to destinations outside Canada may be placed through the Government operator and will be billed to the Delegation.

The Summits Management Office of the Department of External Affairs will assist in expediting orders with Canadian telecommunications carriers.

Economic Summit Missions are therefore requested to inform the Summits Management Office (Capt Ross Burton, 954-2240), of the location for the facilities provided Heads of D elagation as noted above; of any requirements for Wang or IBM word processors; and of further communication equipment or communication requirements including hot lines from Toronto to national capitals at delegation expense by February 15, 1988.

6. SECURITY

All security arrangements are the responsibility of the Royal Canadian Mounted Police who will work closely with the Ontario Provincial Police and the Metropolitan Toronto Police Department.

7. MEDICAL FACILITIES

There will be a medical centre opened 24 hours-a-day at the MTCC with a doctor and nurse located there throughout the meeting. Dental facilities and a full range of medical specialists will be available for referral should they be required.

The principal hospital with immediate responsibility for the Summit meeting will be Toronto General Hospital.

Ottawa Missions of Economic Summit Countries are requested to communicate to the Summit Management Office by the 1st April, 1988 the blood groups and any special dietary requirements of Heads of Delegation, their spouses, each Minister and spouse and Sherpas accompanying the delegations.

8. MEDIA

a. Media Centre

The Media Centre located in the MTCC will provide adequate space, facilities and services to meet all requirements of every national media contingent. The Summit Management Office has been in touch with Governments for guidance on the extent of national requirements.

b. Host Broadcaster

A Host Broadcaster service will also be part of the common facilities; details will be provided in due course.

c. Communique

Any Communique or Joint Declaration coming out of the Toronto Economic Summit will be presented to the media at a session in Roy Thompson Hall on the afternoon of June 21. Simultaneous interpretation facilities will be provided.

9. LIAISON OFFICERS

a. Liaison Officers

Throughout the Summit, each delegation will be assigned Host Government Liaison Officers as points of contact with the host Government and to assist in logistical arrangements.

One Senior Liaison Officer will be assigned to the Head of each delegation. One Media Liaison Officer will be assigned to the media delegation of each participating country. Two other Liaison Officers for each delegation will join the Summits Management Office well before the Summit to become the sole channel and contact point for all information on their respective delegation.

b. Site Advance Visits

Coordinated site visits in Toronto for representatives from capitals will be offered on two separate occasions.

One day will be allocated to each delegation during the

period from 15 to 26 February, 1988. This will include a general briefing in Toronto, and visits to those sites where Summit meetings and other functions will be held. Missions should indicate their preferred date to the Summits Management Office and communicate the names of the members of the Advance Team.

A second, fuller series of advance visits from capitals will be arranged in the three-week period between April 18 and May 7, 1988. These will allow for comprehensive briefings and site visits.

APPENDIX C

PROTOCOL GUIDELINES
for the
TORONTO ECONOMIC SUMMIT

Prepared by:
THE PROTOCOL WORKING GROUP
Clare Haynes
Roger Portelance
Rene Crémonesé
Katrina van Bylandt

May 9, 1988

T A B L E O F C O N T E N T S

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| NAMES AND TITLES | 17 |

PROTOCOL GUIDELINES

The Protocol Guidelines for the Toronto Economic Summit were prepared by the Protocol Working Group after reviewing past Summit practices and consulting:

Mr. Vince Bezeau
Director of Ceremonial
National Defence Headquarters

Mr. Lucien Lemieux
Director, Protocol and Ceremonial
Government House

Mr. Ron Lemieux
Chief of Protocol
Parliament of Canada

Mr. David Malone
Deputy Director and Economic Summit Coordinator
International Economic Relations Division
External Affairs Canada

Mr. Jean Paul Roy
Chief of Ceremonial
Secretary of State

Mr. Gerry Wharton
Chief of Ceremonial and Protocol
Public Works Canada

Summit Protocol, like most other aspects of the Summit process, has constantly evolved since 1975 making it impossible to refer to an immutable tradition rooted in time immemorial. Nevertheless, the review of past summits and the results of our consultation lead us to believe that the following guidelines will not only ensure that diplomatic etiquette and recent summit practice are respected but also provide justification for the decisions taken.

No policy guide can specifically deal with every possible protocol inquiry. In the event that we have not dealt with a particular issue, it is our hope that these guidelines will provide the basis from which a satisfactory solution can be devised.

PARTICIPATION OF THE COMMISSION OF THE EUROPEAN COMMUNITIES

The European Commission should be treated in all respects as a full participant:

1. EC flags fly on all occasions with the flags of all the national participants and the EC anthem should be accorded the same courtesies as those of the other participants.
2. The EC has competence to participate in all matters under discussion at the Summit, and should in every case be accorded the same status as members.

(The above is a result of a discussion between Mr. Hamner, Head of the EEC Mission in Ottawa and Mr. Len Edwards, March 30, 1988).

Please Note: The Commission of the European Communities is the body of officials that govern the European Communities. Mr. Jacques Delors is the President of the Commission of the European Communities.

ORDER OF PRECEDENCE (I)

1. The criteria determining the order of precedence for the Summit Heads of Delegation are their rank (Heads of State, Heads of Government, Senior Officials) and within each rank, length of stay in office. Pride of place is given to the host country irrespective of its Head of Delegation's rank or time in office.
2. Therefore, if the Summit were held today (April 1988) the Order of Precedence would be:

| | | | |
|---------------------------------|------------|-----------------|----------|
| Canada (Host) | Mulroney | Head of Govt. | Sep 1984 |
| United States of America | Reagan | Head of State | Jan 1981 |
| France | Mitterrand | Head of State | May 1981 |
| United Kingdom | Thatcher | Head of Govt. | May 1979 |
| Germany, Federal Republic of | Kohl | Head of Govt. | Oct 1982 |
| Japan | Takehita | Head of Govt. | Nov 1987 |
| Italy | De Mita | Head of Govt. | Apr 1988 |
| EC Commission | Delors | Senior Official | Jan 1985 |

3. This one order of precedence applies not only to the Heads of Delegation but also to the Foreign Ministers, Finance Ministers and Personal Representatives (Sherpas) when required (e.g. at events where Heads of Delegation are not in attendance).
4. This order of precedence is used to determine the sequence of arrivals and departures at event sites, the seating plans for sessions, working meals, the reading of the final communique, and the positioning for the official photograph.
5. Though this order of precedence will not determine actual delegation arrival/departure time at the airport it can be used to resolve any conflicts which might arise.

ORDER OF PRECEDENCE (II)

1. The order of precedence for listing delegations in SMO publications and placing the seven national flags and the European Communities flag is determined by their position in english alphabetical order as listed in the United Nations Membership Act. Pride of place is given to the host country irrespective of its position in the list and the Commission of the European Communities is listed last.

2. Therefore, the order of precedence for flags and publications should be as follows:
 - A. Canada
 - B. France
 - C. Federal Republic of Germany
(listed at UN as Germany, Federal Republic of)
 - D. Italy
 - E. Japan
 - F. United Kingdom
(listed at UN as United Kingdom of Great Britain and Northern Ireland)
 - G. United States of America
 - H. Commission of the European Communities

INVITATIONS

Formal Invitations should be written in french or english according to the following:

| | |
|--|---------|
| Canada | English |
| United States of America | English |
| France | French |
| United Kingdom | English |
| Federal Republic of Germany | English |
| Japan | English |
| Italy | French |
| The Commission of the European Communities | French |

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ormal Invitations should be written in french or english
ccording to the following:

| | |
|--|---------|
| Canada | English |
| United States of America | English |
| France | French |
| United Kingdom | English |
| Federal Republic of Germany | English |
| Japan | English |
| Italy | French |
| The Commission of the European Communities | French |

FLAGS

The Display of Economic Summit Delegation flags is subject to the following rules of Protocol:

1. Although flags may actually vary in size, it is correct procedure for the host country to standardize flag size to that of its national flag. Flags should all be of the same size and flown at the same height.
2. All eight Economic Summit Delegation flags should be displayed. The host flag should appear first to the viewer's left. Next to the host flag and working their way to the right should be the remaining Economic Delegation flags in english alphabetical order (in accordance with the UN membership list). The European Communities flag should be flown last on the right. Therefore Economic Summit flags should be flown positioned from left to right as follows:
 - i) Canada
 - ii) France
 - iii) Germany, Federal Republic of
 - iv) Italy
 - v) Japan
 - vi) United Kingdom
 - vii) United States of America
 - viii) European Communities
3. The flags should be placed so that the viewer sees the host flag at the left and the remaining Economic Summit flags in proper sequence to the right. If the flags are close to the Heads of Delegation they are placed as viewed by the audience. If the flags are close to the audience they are placed as viewed by the Heads of Delegation.
4. When lining a roadway with flagpoles, the arriving party should see the host flag first and then in alphabetical order should view the remaining flags with the European Communities flag positioned last.

RED CARPET

1. Red Carpet may be utilized at sites where Heads of Delegations are present to the extent deemed appropriate by the Summits Management Office.
2. Since the red carpet is used to honour the Heads of Delegations it is inappropriate to provide the same level of treatment at Ministerial functions.

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OFFICIAL WELCOME

1. The Department of National Defence will provide a 50 person Guard of Honour for the Heads of Government and the President of the Commission of the European Communities and a 100 person Guard of Honour for the Heads of State. It will also provide a military band to play their national anthems.
2. Traditional military honours for an official visit to Canada would include the following elements:

Visitor escorted to dais (stands alone)
National Anthem (played, never sung)
Gun salute commences (21 for Heads of State/
19 for Heads of Government)
Guard Commander invites Visitor to inspect
Guard of Honour
Visitor reviews Guard of Honour
Visitor pays compliments to Band Commander
Visitor returns to dais
National Anthem of Canada

As this is not an official visit to Canada and due to the exceptional nature of the Economic Summit and recent summit practice re: the Official Welcome, the Department of National Defence has agreed to radically alter the above mentioned scenario.

3. The military honours provided for the Official Welcome will be the following:
PM of Canada and Visiting HOD stand on dais
Guard of Honour present arms while
National Anthem of Visitor is played.

ARRIVALS AND DEPARTURES

Arrivals:

1. The arrival of Heads of Delegation, Foreign Ministers and Finance Ministers at formal Hospitality/Summit Events is governed by the reverse order of precedence.
2. The Canadian Government Representatives should, in principle, be the first to arrive at all sites to fulfill their role as Hosts.
3. For example:
Arriving first: Canada
Arriving second: The Commission of the European Communities
Arriving third: Italy
Arriving fourth: Japan
Arriving fifth: Federal Republic of Germany
Arriving sixth: United Kingdom
Arriving seventh: France
Arriving last: United States of America

Departures:

1. The Departure of Heads of Delegation, Foreign Ministers and Finance Ministers from formal Hospitality/Summit Events is decided by the regular order of precedence.
2. The Canadian Government Representatives should, in principle, be the last to depart to fulfill their role as Hosts.
3. For example:
Departing first: United States of America
Departing second: France
Departing third: United Kingdom
Departing fourth: Federal Republic of Germany
Departing fifth: Japan
Departing sixth: Italy
Departing seventh: The Commission of the European Communities
Departing last: Canada

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PUBLICATIONS

The listing of Economic Summit Delegations for publication is subject to the same rules of protocol as is the display of Delegation flags. The Canadian Delegation will be listed first, with the remaining Delegations organized in english alphabetical order in accordance with the United Nations Membership Act. The order in french remains identical to the english despite differences in spelling.

The composition of each Delegation will be listed in the order of precedence specific to the Delegation in question. Delegation lists will be furnished by the Delegations' themselves and will indicate the fifteen official delegates arranged according to their rank. It is only the fifteen official delegates who appear in the Directory of Delegations and Secretariat Publication.

For Publication purposes the Economic Summit Delegations will be written and listed as shown below:

English

- 1) Canada
- 2) France
- 3) Federal Republic of Germany
- 4) Italy
- 5) Japan
- 6) United Kingdom
- 7) United States of America
- 8) The Commission of the European Communities

French

- 1) Canada
- 2) France
- 3) République fédérale d'Allemagne
- 4) Italie
- 5) Japon
- 6) Royaume-Uni
- 7) États-Unis d'Amérique
- 8) Commission des Communautés européennes

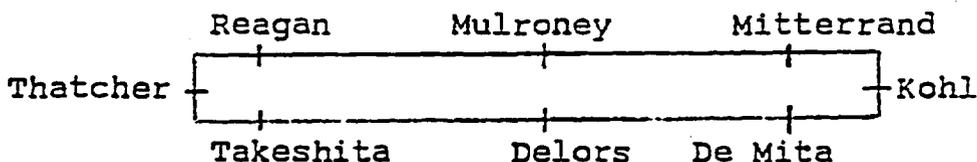
SEATING ARRANGEMENTS -- SESSIONS

(A) Separate Sessions:

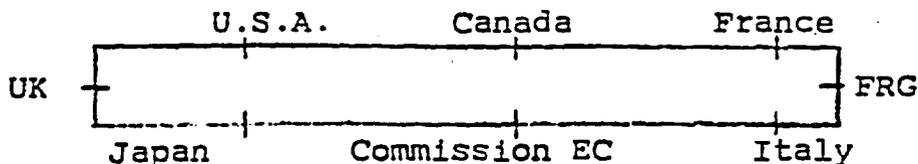
At Separate Sessions seating should be arranged according to the following guidelines:

- 1) the Chair/Host is the reference point from which an alternating right, left pattern is used to organize seating plans (beginning from the Chair's/Host's right).
- 2) A list of the Economic Summit Delegations organized by Order of Precedence (1) [see page 3] will serve as the reference list with which Delegations are seated, alternating right, left, around the host position.

For example, at a separate session for Heads of Delegation, The Canadian Prime Minister would be the Host, The President of the United States would be seated to Canada's right and the President of the Republic of France would be seated to Canada's left, etc. The diagram below completes the above explanation:



At a separate session for Foreign Ministers or Finance Ministers the same rules will apply. They will be organized according to the order of precedence determined by their Head of Delegation. For example, when a Canadian Minister is hosting a separate session, the U.S. Minister will be seated to the Canadian Minister's right and the French Minister will be seated to the Canadian Minister's left etc:



Sherpas should be seated according to the same rules as the Foreign/Finance Ministers:

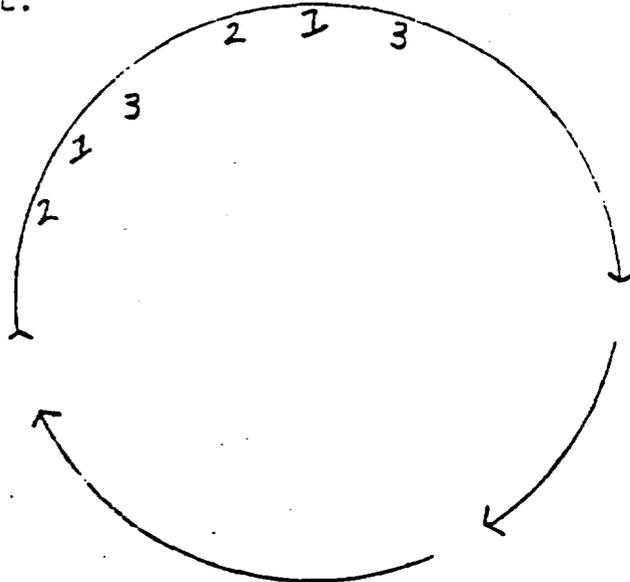
(B) Plenary Sessions

During Plenary Sessions the Head of Delegation, Foreign Minister and Finance Minister for each Economic Summit Delegation are present. Each Delegation is allotted three places, grouped together at a given location around the large table. The Commission of the European Communities will be accorded the same number of seats as the other Delegations.

Seating for Plenary Sessions should be arranged according to the following guidelines:

1. The Chair/Host is the reference point from which an alternating right, left pattern is used, along with the order of precedence list, to organize each Head of Delegation at a position around the table.
2. The Foreign Minister for each Delegation will be seated to his Head of Delegation's right and the Finance Minister will be seated to his left.

Example:



1 = Head of Delegation
2 = Foreign Minister
3 = Finance Minister

Informal Sessions

The informal nature of this meeting could preclude a formal seating arrangement but the same rule applied to separate sessions could be used as a guideline.

SEATING ARRANGEMENTS -- HOSPITALITY EVENTS

The following is an outline of Summit Hospitality Events. Seating arrangements for all events listed below (A + B) are identical to those outlined for relevant Separate Sessions. The Heads of Delegations and Foreign Ministers Joint Luncheon is an exception as explained below (C):

(A) Separate Heads of Delegation Events:

| | | |
|-----------|-------------|-----------------------------------|
| June 19th | 1900 - 2100 | The Toronto Hunt Club |
| June 20th | 2000 - 2130 | Hart House, University of Toronto |

(B) Separate Ministerial Events:

i) Foreign Ministers

| | | |
|-----------|-------------|-----------------------------------|
| June 19th | 1900 - 2100 | The Faculty Club |
| June 20th | 2000 - 2130 | Hart House, University of Toronto |

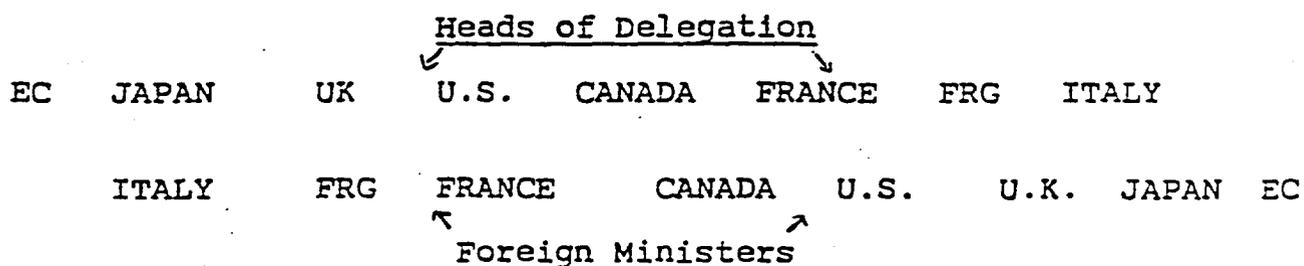
ii) Finance Ministers

| | | |
|-----------|-------------|-----------------------------------|
| June 19th | 1900 - 2100 | The Old Mill |
| June 20th | 1230 - 1430 | L'Hotel |
| June 20th | 2000 - 2130 | Hart House, University of Toronto |

(C) Heads of Delegation and Foreign Ministers Joint Luncheon

| | | |
|-----------|-------------|---------|
| June 20th | 1230 - 1430 | L'Hotel |
|-----------|-------------|---------|

For this occasion the rules have differed slightly. Below is a diagram of the seating arrangements used at the Venice Summit:



At one side of the table the Heads of Delegation are organized in right, left alternating order governed by the order of precedence. The same process is repeated on the other side of the table in order to seat the Foreign Ministers.

(D) Combined Luncheon for Heads of Delegation, Foreign Ministers, Finance Ministers and Spouses hosted by the Governor General of Canada

June 21st 1230 - 1430 Art Gallery of Ontario

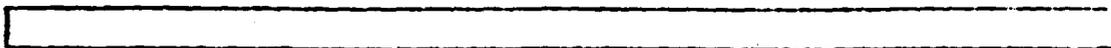
The Governor General's Luncheon will be organized by Rideau Hall Staff. However, Rideau Hall has been consulted and will use the Summit Order of Precedence (1) in determining its seating plans.

SEATING ARRANGEMENTS -- FINAL COMMUNIQUE

June 21st 1530 - 1600 Roy Thomson Hall

The seating order will remain the same as that used for the Head of Delegation Dinners and Working Sessions. The Heads of Delegation will be seated facing the press at a table in the following order:

EC Japan UK USA Canada France FRG Italy



OFFICIAL PHOTOGRAPH

Heads of Delegation should be positioned for the Official Photograph in the same order as they are seated for the Presentation of the Final Communique.

EC Japan UK USA Canada France FRG Italy

EXACT NAMES AND TITLES

For your reference the exact names and titles of the Heads of Government, Foreign Ministers, Finance Ministers, Sherpas and Spouses who could attend the Summit have been listed. Both The Federal Republic of Germany and Japan have indicated that they will likely be bringing with them a Minister of equal status to that of the Finance Minister. These Ministers have been listed. The information was compiled from information provided by embassy officials. In particular, we have very little information about the attendance of spouses.

Please note that this list does not necessarily indicate the confirmed attendance of the persons listed. This information will be provided by a separate memo.

CANADA

PLEASE NOTE: This list does not indicate the confirmed attendance of the persons listed.

1. HEAD OF DELEGATION

The Right Honourable Brian Mulroney
Prime Minister of Canada

SPOUSE: Mrs. Mila Mulroney

2. MINISTER OF FOREIGN AFFAIRS

The Right Honourable Joe Clark
Secretary of State for External Affairs

SPOUSE: Ms. Maureen McTeer

3. MINISTER OF FINANCE

The Honourable Michael H. Wilson
Minister of Finance

SPOUSE: Mrs. Margaret C. Wilson

4. PERSONAL REPRESENTATIVE (SHERPA)

Mrs. Sylvia Ostry
Ambassador For Multilateral Trade Negotiations

CANADA

1. CHEF DE DÉLÉGATION

Le très honorable Brian Mulroney
Premier ministre du Canada

CONJOINTE: Madame Mila Mulroney

2. MINISTRE DES AFFAIRES ÉTRANGÈRES

Le très honorable Joe Clark
Secrétaire d'État aux Affaires extérieures

CONJOINTE: Madame Maureen McTeer

3. MINISTRE DES FINANCES

L'honorable Michael H. Wilson
Ministre des Finances

CONJOINTE: Madame Margaret C. Wilson

4. REPRÉSENTANT PERSONNEL (SHERPA)

Madame Sylvia Ostry
Ambassadeur aux Négociations commerciales multilatérales

FRANCE

PLEASE NOTE: This list does not indicate the confirmed attendance of the persons listed.

1. HEAD OF DELEGATION

His Excellency François Mitterrand
President of the Republic of France

SPOUSE: Mrs. Danielle Mitterrand

2. MINISTER OF FOREIGN AFFAIRS

His Excellency Jean-Bernard Raimond
Minister of Foreign Affairs

SPOUSE: Mrs. Monique Raimond

3. MINISTER OF FINANCE

His Excellency Édouard Balladur
Minister responsible for Economics, Finance and Privatization

SPOUSE: Mrs. E. Balladur

4. PERSONAL REPRESENTATIVE (SHERPA)

Mr. Jacques Attali
Special Counsellor of the President

FRANCE

1. CHEF DE DÉLÉGATION

Son Excellence Monsieur François Mitterrand
Président de la République française

CONJOINTE: Madame Danielle Mitterrand

2. MINISTRE DES AFFAIRES ÉTRANGÈRES

Son Excellence Monsieur Jean-Bernard Raimond
Ministre des Affaires étrangères

CONJOINTE: Madame Monique Raimond

3. MINISTRE DES FINANCES

Son Excellence Monsieur Édouard Balladur
Ministre chargé de l'Économie, des Finances
et de la Privatisation

CONJOINTE: Madame E. Balladur

4. REPRÉSENTANT PERSONNEL (SHERPA)

M. Jacques Attali
Conseiller spécial du Président

FEDERAL REPUBLIC OF GERMANY

PLEASE NOTE: This list does not indicate the confirmed attendance of the persons listed.

1. HEAD OF DELEGATION

His Excellency Helmut Kohl
Chancellor of the Federal Republic of Germany

SPOUSE: Mrs. Hannelore Kohl

2. MINISTER OF FOREIGN AFFAIRS

His Excellency Hans-Dietrich Genscher
Federal Minister for Foreign Affairs and Deputy Federal Chancellor

SPOUSE: Mrs. Barbara Genscher

3. MINISTER OF FINANCE

His Excellency Gerhard Stoltenberg
Federal Minister of Finance

SPOUSE: Mrs. Margot Stoltenberg

4. MINISTER OF ECONOMICS

His Excellency Martin Bangemann
Minister of Economics

SPOUSE: Mrs. Renate Bangemann

5. PERSONAL REPRESENTATIVE (SHERPA)

Mr. Hans Tietmeyer
Secretary of State of the Ministry of Finance

Note: The Order of Precedence for the Minister of Finance and Minister of Economics has not yet been confirmed.

RÉPUBLIQUE FÉDÉRALE D'ALLEMAGNE

1. CHEF DE DÉLÉGATION

Son Excellence Monsieur Helmut Kohl
Chancelier de la République fédérale d'Allemagne

CONJOINTE: Madame Hannelore Kohl

2. MINISTRE DES AFFAIRES ÉTRANGÈRES

Son Excellence Monsieur Hans-Dietrich Genscher
Ministre fédéral des Affaires étrangères
et vice-chancelier fédéral

CONJOINTE: Madame Barbara Genscher

3. MINISTRE DES FINANCES

Son Excellence Monsieur Gerhard Stoltenberg
Ministre fédéral des Finances

CONJOINTE: Madame Margot Stoltenberg

4. MINISTRE DE L'ÉCONOMIE

Son Excellence Monsieur Martin Bangemann
Ministre de l'Économie

CONJOINTE: Madame Renate Bangemann

5. REPRÉSENTANT PERSONNEL (SHERPA)

M. Hans Tietmeyer
Secrétaire d'État du ministère des Finances

Note: L'ordre des préséances dans le cas du ministre des Finances et du ministre de l'Économie n'a pas encore été confirmé.

ITALY

PLEASE NOTE: This list does not indicate the confirmed attendance of the persons listed.

1. HEAD OF DELEGATION

His Excellency Ciriaco De Mita
President of the Council of Ministers

SPOUSE: Mrs. Anna Maria De Mita

2. MINISTER OF FOREIGN AFFAIRS

His Excellency Giulio Andreotti
Minister of Foreign Affairs

SPOUSE: Mrs. Livia Andreotti

3. MINISTER OF FINANCE

His Excellence Giuliano Amato
Minister of Finance

SPOUSE: Mrs. Diana Amato

4. PERSONAL REPRESENTATIVE (SHERPA)

Mr. Mario Sarcinelli
Director General, Ministry of the Treasury
Secretary General for the Ministry of Foreign Affairs

ITALIE

1. CHEF DE DÉLÉGATION

Son Excellence Monsieur Ciriaco De Mita
Président du Conseil des ministres

CONJOINTE: Madame Anna Maria De Mita

2. MINISTRE DES AFFAIRES ÉTRANGÈRES

Son Excellence Monsieur Giulio Andreotti
Ministre des Affaires étrangères

CONJOINTE: Madame Livia Andreotti

3. MINISTRE DES FINANCES

Son Excellence Monsieur Guiliano Amato
Ministre des Finances

CONJOINTE: Madame Diana Amato

4. REPRESENTANT PERSONNEL (SHERPA)

M. Mario Sarcinelli
Directeur général, ministère du Trésor
Secrétaire general du ministère des Affaires étrangères

JAPAN

PLEASE NOTE: This list does not indicate the confirmed attendance of the persons listed.

1. HEAD OF DELEGATION

His Excellency Noboru Takeshita
Prime Minister of Japan

SPOUSE: Mrs. Naoko Takeshita

2. MINISTER OF FOREIGN AFFAIRS

His Excellency Sousuke Uno
Minister for Foreign Affairs

SPOUSE: Mrs. Chiyo Uno

3. MINISTER OF FINANCE

His Excellency Kiichi Miyazawa
Minister of Finance

SPOUSE: Mrs. Yoko Miyazawa

4. MINISTER OF INTERNATIONAL TRADE AND INDUSTRY

His Excellency Hajime Tamura
Minister of International Trade and Industry

SPOUSE: Mrs. Tamura

5. PERSONAL REPRESENTATIVE (SHERPA)

Mr. Hiroshi Kitamura
Personal Representative of the Prime Minister and
Deputy Minister for Foreign Affairs

Note: The Order of Precedence for the Minister of Finance and the Minister of International Trade and Industry has not yet been confirmed.

JAPON

1. CHEF DE DÉLÉGATION

Son Excellence Monsieur Noboru Takeshita
Premier ministre du Japon

CONJOINTE: Madame Naoko Takeshita

2. MINISTRE DES AFFAIRES ÉTRANGÈRES

Son Excellence Monsieur Sousuke Uno
Ministre des Affaires étrangères

CONJOINTE: Madame Chiyo Uno

3. MINISTRE DES FINANCES

Son Excellence Monsieur Kiichi Miyazawa
Ministre des Finances

CONJOINTE: Madame Yoko Miyazawa

4. MINISTRE DU COMMERCE INTERNATIONAL ET DE L'INDUSTRIE

Son Excellence Monsieur Hajime Tamura
Ministre du Commerce international et de l'Industrie

CONJOINTE: Madame Tamura

5. REPRÉSENTANT PERSONNEL (SHERPA)

Mr. Hiroshi Kitamura
Représentant personnel du Premier ministre
et sous-ministre des Affaires étrangères

Note: L'ordre des préséances dans le cas du ministre des Finances et du ministre du Commerce international et de l'Industrie n'a pas encore été confirmé.

UNITED KINGDOM

PLEASE NOTE: This list does not indicate the confirmed attendance of the persons listed.

1. HEAD OF DELEGATION

The Right Honourable Margaret Thatcher, P.C., M.P.
Prime Minister of the United Kingdom

SPOUSE: Mr. Denis Thatcher

2. MINISTER OF FOREIGN AFFAIRS

The Right Honourable Sir Geoffrey Howe
Secretary of State for Foreign and Commonwealth Affairs/
Minister of Overseas Development

SPOUSE: Lady Elspeth Howe

3. MINISTER OF FINANCE

The Right Honourable Nigel Lawson, M.P.
The Chancellor of the Exchequer

SPOUSE: Mrs. Therese Lawson

4. PERSONAL REPRESENTATIVE (SHERPA)

Mr. Nigel Wicks
Principal Private Secretary to the Prime Minister

ROYAUME-UNI

1. CHEF DE DÉLÉGATION

La très honorable Margaret Thatcher, C.P., député
Premier ministre du Royaume-Uni

CONJOINT: Monsieur Denis Thatcher

2. MINISTRE DES AFFAIRES ÉTRANGÈRES

Le très honorable sir Geoffrey Howe
Secrétaire d'État aux Affaires étrangères
et du Commonwealth et ministre du Développement outre-mer

CONJOINTE: Lady Elspeth Howe

3. MINISTRE DES FINANCES

Le très honorable Nigel Lawson, député
Chancelier de l'Échiquier

CONJOINTE: Madame Therese Lawson

4. REPRÉSENTANT PERSONNEL (SHERPA)

M. Nigel Wicks
Secrétaire privé principal du Premier ministre

UNITED STATES OF AMERICA

PLEASE NOTE: This list does not indicate the confirmed attendance of the persons listed.

1. HEAD OF DELEGATION

The Honourable Ronald Reagan
President of the United States of America

SPOUSE: Mrs. Nancy Reagan

2. MINISTER OF FOREIGN AFFAIRS

The Honourable George P. Shultz
Secretary of State

SPOUSE: Mrs. Helena Shultz

3. MINISTER OF FINANCE

The Honourable James A. Baker III
Secretary of the Treasury

SPOUSE: Mrs. Susan Baker

4. PERSONAL REPRESENTATIVE (SHERPA)

Mr. Allen Wallis
Under Secretary of State for Economic Affairs

ÉTATS-UNIS D'AMÉRIQUE

1. CHEF DE DÉLÉGATION

L'honorable Ronald Reagan
Président des États-Unis d'Amérique

CONJOINTE: Madame Nancy Reagan

2. MINISTRE DES AFFAIRES ÉTRANGÈRES

L'honorable George P. Shultz
Secrétaire d'État

CONJOINTE: Madame Helena Shultz

3. MINISTRE DES FINANCES

L'honorable James A. Baker III
Secrétaire du Trésor

CONJOINTE: Madame Susan Baker

4. REPRÉSENTANT PERSONNEL (SHERPA)

M. Allen Wallis
Sous-secrétaire d'État aux Affaires économiques

COMMISSION OF THE EUROPEAN COMMUNITIES

PLEASE NOTE: This list does not indicate the confirmed attendance of the persons listed.

1. HEAD OF DELEGATION

His Excellency Jacques Delors
President of the Commission of European Communities

SPOUSE: Mrs. Marie Delors

2. MINISTER OF FOREIGN AFFAIRS (EQUIVALENT)

His Excellency Willy de Clercq
Commissioner, Foreign Affairs

SPOUSE: Mrs. Fernande De Clercq

3. MINISTER OF FINANCE (EQUIVALENT)

His Excellency Peter M. Schmidhuber
Commissioner, Monetary Affairs

SPOUSE: (Widower)

4. PERSONAL REPRESENTATIVE (SHERPA)

Mr. Pascal Lamy
Personal Representative of the President of European Communities
and Chef du Cabinet, President's Office

COMMISSION DES COMMUNAUTÉS EUROPÉENNES

1. CHEF DE DÉLÉGATION

Son Excellence Monsieur Jacques Delors
Président de la Commission des Communautés européennes

CONJOINTE: Madame Marie Delors

2. MINISTRE DES AFFAIRES ÉTRANGÈRES (ÉQUIVALENT)

Son Excellence Monsieur Willy de Clercq
Membre de la Commission, Relations extérieures

CONJOINTE: Madame Fernande de Clercq

3. MINISTRE DES FINANCES (ÉQUIVALENT)

Son Excellence Monsieur Peter M. Schmidhuber
Membre de la Commission, Affaires monétaires

CONJOINTE: (veuf)

4. REPRÉSENTANT PERSONNEL (SHERPA)

M. Pascal Lamy
Représentant personnel du Président de la Commission des
Communautés européennes et chef de cabinet, bureau du Président

APPENDIX D

as of March 28, 1988

ACCREDITATION POLICIES AND PROCEDURES

ECONOMIC SUMMIT

TORONTO

JUNE 19-21, 1988

ACCREDITATION POLICIES

Objectives

- 1) To ensure delegate security through the issuing of pins and identification badges (ID) and
- 2) To control access through a combination of ID badges and a system of access passes

1) SECURITY

All Summit Participants must be in possession of a Pin, or an Identification Badge which both identifies the bearer and defines his/her general access entitlement. ID cards and the access they denote are shown at Annex I. In order to assure delegate security, all participants must:

- a. - be reliability checked and accredited by the RCMP (site personnel, media, volunteers, RCMP, DND) or;
- be security cleared by CSIS (SMO personnel, agency personnel, LO, Host Broadcast) or;
- be designated by a participating government as a member of a delegation.
- b. - be issued an identification badge which will include photo, full name, role and/or company, site, and, for delegates, a flag or other mark of national designation. This badge must be worn at all times, externally and readily visible. Heads of Delegation, ministers (members of official delegation) and sherpas and their spouses will be issued a pin - to be worn in place of an identification badge.

2) ACCESS CONTROL

In addition to ID Badges, participants will require Access Passes for admission to certain controlled areas.

Access control will be accomplished by means of access passes. These will be required at the MTCC, retreat/meeting sites, sites for social functions, delegation hotels and the SMO Operation Centre.

ACCESS PASSES

a. MAIN MEETING SITE

In order to control access to meeting rooms, offices and media areas, the meeting site will be divided into three zones as follows:

ZONE RED (OR A)

This zone will include the Head, Ministers and Sherpas' meeting rooms, lounges and offices, and dining area.

ZONE BLUE (OR B)

Included in this zone are the delegation offices the delegation dining area, the Summit Secretariat and the RCMP Operations Centre.

ZONE YELLOW (OR C)

All delegation media work and briefing rooms, combined print and TV/radio work areas, as well as the media dining area are located in this zone.

Access passes will be printed as follows:

Two types of Access Passes will be produced - Red and Blue. A Restricted number of access passes for the Red/(A) and Blue/(B) Zones will be issued to each delegation. The Red Pass will allow access to the Red, Blue and Yellow Zones, and the Blue Pass to the Blue and Yellow Zones. Each delegation will be responsible for issuing and controlling these passes.

Following practice at past summits, access passes should be issued by SMO on the following basis:

Red passes

- i. Heads of Government Ministers and Sherpas who will require only their identification pin for access to any site;
- ii. Five transferable passes to be held by each Sherpa allowing access to the Red Zone on Heads or Ministers invitation;
- iii. Transferable passes to be held by SMO which can be used for emergency access by delegates (on the request of national delegation and the approval of SMO), or by SMO to the Red Zone.

Blue passes

- i. Twenty-five transferable passes to be distributed by each delegation for access to the delegation office, dining area and Summit Secretariat in the Blue Zone.
- ii. Transferable passes to be held by SMO which can be used for emergency access by delegates (on the request of national delegation and the approval of SMO), or by SMO to the Blue Zone.

NOTE: Access passes are not required to enter Yellow Zone. ID badges/pins will be required.

Temporary Passes

- i. Temporary access to the meeting site may be required by technical and non-technical suppliers. These persons must be identified and sponsored by SMO, must fill out an accreditation form, be photographed, surrender an appropriate piece of identification and be issued a temporary access pass. These persons will be escorted by Conference Operations, Facilities and Services. The ID will be retrieved by the holder upon return of the pass to an Accreditation Officer.

With the exception of i. above and observers there will be no other temporary access to the meeting site.

Access for delegation rental car drivers will be determined by the Transport Working Group.

b. Meeting/Hospitality Sites:

For all sites other than the main meeting site, access passes in addition to ID badges/pins will be required. Each such site will require a separate non-nominative access pass indicating site.

The number of meeting sites access passes is predicated on the nature of the meeting site arrangements, including the number of aides to accompany the Heads/ Ministers.

c. Social Functions:

Attendance at social functions will be by invitation only. Admittance to the function will require presentation of an invitation to be verified by SMO Site Manager/staff (using a master list). Invitees who are not participants in the Summit would not be issued ID badges or access passes.

d. Delegation Hotels:

A Temporary Hotel Access pass will be issued to a person requiring access to a delegation hotel. This person shall be sponsored by a Delegation member or SMO, will fill out an accreditation form, will be photographed and will surrender an appropriate piece of identification before receiving the Temporary access pass. The identification will be retrieved by the holder upon return of the pass to an Accreditation Officer in the SMO Hotel Site Office.

Temporary access passes will indicate:

1. Economic Summit Logo
2. Identifier Number
3. A large T

A person wearing a temporary Hotel access pass will be escorted by an appropriately accredited Summit participant or security person at all times.

e. SMO Operations Centre:

Persons allowed access to the SMO Operations Centre will have a coloured dot placed on the back of their SMO ID Badge.

f. Media Pool Participants:

A media pool access pass will be issued by SMO media to media representatives chosen to attend specific events (i.e. Opening Ceremonies, Heads of Delegation arrival at hotel, etc).

ACCREDITATION PROCEDURES

A) Before the Summit

The implementation of the Economic Summit Accreditation policies are the responsibility of six sections of SMO:

1. RCMP

The RCMP is responsible for the accreditation (reliability check) of the following Summit participants:

- SMO volunteers
- SMO host broadcast members
- Media representatives (Canadians only)
- Site personnel including hotel staff, meeting, and hospitality site staff
- Summit suppliers requiring access to sites
- SMO VIP
- SMO observers (Canadians only).

The RCMP is also responsible for processing the ID badges (photography of personnel, typing of badges, distribution of badges and maintenance of a computer database) for the following:

- Site personnel
- RCMP
- DND

2. Logistics, Transport, Liaison and Protocol (LTLF)

This SMO section holds responsibility for processing the ID badges/pins (photography, typing of badges, distribution of badges and the maintenance of a computer database) for:

- Delegates (and spouses)
- Summit suppliers requiring access to sites
- SMO Staff (includes host broadcast and IOs)
- SMO volunteers
- Observers
- SMO (VIPs)

3. Media

The media section will be responsible for processing and distribution of badges and the maintenance of a computer database for:

- National and international media representatives

4. Accreditation Working Group

Before the Summit, the above-mentioned SMO sections will meet regularly in the Accreditation Working Group.

The Working Group is responsible (through LTLF) for the design, quality control and production of ID badges/pins, access passes, pouches, chains and stickers, as well as the security of these items.

5. Conference Operations, Facilities and Services

This section will order, procure (in conjunction with Finance and Administration), install and dismantle all accreditation equipment. COFS is also responsible for escorting all individuals issued a MTCC Temporary access pass and staffing the Red and Blue Zones' access checkpoints of the Main Meeting Site.

6. Finance and Administration

This section will work with Conference Operations, Facilities and Services and Supply and Services Canada to order the accreditation equipment in addition to assisting the Accreditation Working Group with the procurement of ID badges/pins, access passes, pouches, chains and stickers.

B) During the Summit

During the Summit these six sections as well as other sections will work together as follows:

1. MTCC Accreditation Centre

The RCMP, Media and LTLP will staff an accreditation centre where

- Media representatives will pick up their badges and SMO media will monitor the flow of accreditation for national and international media representatives.
- LTLP will monitor the flow of accreditation of the participants described in "Accreditation Procedures A) 2." as well as distributing all MTCC temporary access passes.
- RCMP will monitor the flow of accreditation for the participants described in "Accreditation Procedures A) 1."

2. SMO Hotel Site Offices

LTLP will distribute delegate accreditation as well as temporary hotel access passes through the respective hotel accommodation/accreditation offices.

3. MTCC Media Centre

Media will distribute the media pool passes from this site.

4. Meeting/Social Function Sites

Event Management will staff a registration /accreditation desk at these sites in order to monitor the flow of all accredited participants. Event Management will also distribute access passes should a delegation misplace or damage these passes.

5. MTCC Security/Access Checkpoints

All Security checkpoints will be staffed by the RCMP (i.e. perimeter)

Where a checkpoint requires access control as well as security control (i.e., red and blue zones among others) CONFS and the RCMP will be responsible for the checkpoints.

Occasionally, within a secured zone, only SMO (CONFS) will be responsible for an access checkpoint as the security function is performed at the zone's perimeter.

6. Delegation Liaison Officers

The Liaison Officers will distribute the delegation red and blue access passes as well as any Meeting Site access passes.

APPENDIX E

PUBLICATIONS

The following is a listing of sample publications (including brief descriptions) which have been published for past summits:

THE AIDE MEMOIRE

- a document prepared for early distribution (three to four months prior to the summit) to participating countries outlining the preparations and facilities for the summit/conference, and requesting accreditation, accommodation and transportation information from the delegates.

MEDIA AIDE MEMOIRE

- the document prepared for early distribution (three months prior) to participating media outlining the preparations and facilities for the summit/conference as it applies to the media, and requesting accreditation, accommodation and transportation information from the media.

OFFICIAL PROGRAMME

- a pamphlet providing a brief outline of the delegates' programme on a daily basis, for distribution at the summit.

MEDIA PROGRAMME

- a pamphlet providing a brief outline of the medias' programme on a daily basis, for distribution at the summit.

DELEGATES' HANDBOOK

- a quick reference for delegates, describing the facilities that are provided in and around the meeting site, as well as certain other relevant information, for distribution in the delegates' kit at the summit.

MEDIA HANDBOOK

- a handbook prepared for media representatives accredited to the summit/conference; describing the arrangements and facilities provided in the Media Centre and around the city, for distribution in the media kit at the summit.

SPOUSES' SOCIAL PROGRAMME

- a pamphlet outlining the social activities organized for the visiting spouses, for distribution at the summit.

SOCIAL PROGRAMME

- a pamphlet describing the social activities offered to the delegates and media, including instructions on reservations and transportation, for distribution at the summit.

DIRECTORY OF DELEGATIONS

- a complete listing of delegates and titles of all delegates from all participating countries, for distribution at the summit.

LIAISON OFFICERS' MANUAL

- a quick reference document for the liaison officers, outlining information required to assist them in fulfilling their role, for distribution during their training programme prior to the summit.

MEDIA RELATIONS HANDBOOK

- a quick reference document for the media relations officers, outlining information required to assist them in fulfilling their role, for distribution during their training programme prior to the summit.

THE SCENARIO MANUAL

- a manual of all scenarios, outlining all movements of the principal participants and motorcades during the summit, for distribution on a "need-to-know" basis prior to the summit.

ACCREDITATION FORMS

- a form to be completed by all delegates, media, staff, and any other persons requiring access to a secure area, for distribution with the aide memoire three to four months prior to the summit.

FACILITIES CATALOGUES

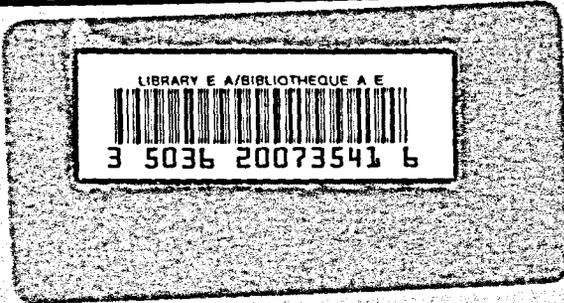
- comprehensive catalogues prepared by the Conference and Site Preparations section outlining floor plans and inventory requirements, distributed as a working document for use prior to the summit.

MOVE-IN/MOVE-OUT SCHEDULE

- detailed chronological schedule of all equipment and supplies moving in and out of the summit sites, and all work scheduled, distributed as a working document for use prior to the summit.

VOLUNTEER TRAINING MANUAL

- a quick reference manual for volunteers, outlining duties and other relevant information, for distribution during their training programme prior to the summit.



DUE DATE / DATE DE RETOUR

DOCS
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 Organizing the summit
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