

# GUIDANCE

★★★ *trade commissioner service* ★★★

# MANUAL



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CANADIAN GOVERNMENT  
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MANUAL

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# GUIDANCE MANUAL

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## GUIDANCE MANUAL

### \*\*\* INTRODUCTION \*\*\*

1. Guidance Papers recommend useful procedures. These may involve action required because of regulations or may permit the Trade Commissioner's discretion. This is in contrast to "Official Instructions" which, being mandatory, provide definitely what action must or must not be taken under a specific set of circumstances.

2. The Guidance Papers are intended to be complementary to "Official Instructions" and to provide a ready reference to official and personal information known to be useful to officers posted abroad. When the content of a Guidance Paper becomes a departmental instruction, it will be re-written as such in the form of an amendment to "Official Instructions".

3. Requests for information in the form of a Guidance Paper on any subject, whether personal or business, are welcome.

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*Original 3 January 61*

## \* \* \* ORIGIN OF THE SERVICE \* \* \*

1. The Department of Trade and Commerce was created by an Act of the Canadian Parliament passed in 1887 and made effective by an Order in Council dated December 5th, 1892. The Act, which is about a page in length, is divided into six sections the third of which outlines the duties and powers of the Minister as follows:

"The duties and powers of the Minister of Trade and Commerce shall extend to the execution of laws enacted by the Parliament of Canada, and of orders of the Governor in Council, relating to such matters connected with trade and commerce generally as are not by law assigned to any other department of the Government of Canada, as well as the direction of all public bodies, officers and servants employed in the execution of such laws and orders."

2. In assuming responsibility for "matters connected with trade and commerce" the newly formed department fell heir to the machinery for trade promotion that had been gradually built up by the Canadian government since Confederation.

3. In addition to trade treaties which continue to play an important role in furthering Canada's external trade, the government had encouraged a more direct type of trade promotion. Prior to the establishment of the Department of Trade and Commerce, three agencies or channels assisting Canada's external trade existed: Canadian Emigration Agents, the offices of the Canadian High Commissioner in London and the Commissioner-General in Paris, and Canadian Commercial Agents abroad acting under the Minister of Finance. In return for an honorarium of \$250-a year, the agents reported periodically on trade opportunities for Canada in their areas and were available to answer trade enquiries.

\* \* \*

*Original 3 January 61*

## \* \* \* PROTOCOL \* \* \*

For quick reference and reminder, here are some of the main elements.

**PRECEDENCE**

Officers of the Department of External Affairs and Trade and Commerce will be listed on the basis of seniority as determined by the date of their promotion to their current grades. When two officers have the same seniority, precedence will be given to the one who first arrived at the Post. Officers of other departments posted through External Affairs will be considered as External Affairs F.S.O.'s for purposes of precedence. (See *Official Instructions* 1-20-30).

**NOMENCLATURE**

Whilst, for signatures on correspondence and listing in Foreign Trade, our officers will continue to use the Trade Commissioner Service ranks, they may, when appropriate, use the diplomatic designation corresponding to their Trade Commissioner Service rank for identification in diplomatic lists. (See *Official Instructions* 1-20-30)

**CHARGE D'AFFAIRES**

Only External Affairs or Trade and Commerce officers will be appointed as Charge d'Affaires. When an External Affairs officer assumes duties as Charge d'Affaires, the Trade Commissioner will carry on his own duties as he would under normal circumstances. However, when a Trade Commissioner is appointed Charge d'Affaires his duties will include the supervision of the activities of External Affairs officers. (See *Official Instructions* 1-20-40).

**SALE OF PERSONALLY OWNED GOODS**

F.S.O.'s and F.S.E.'s abroad are reminded of the need to exercise great care to ensure that, in acquiring or disposing of goods under diplomatic franchise, they do not contravene, or appear to contravene any local laws. This is particularly applicable with respect to motor cars. Where there is any possibility that an individual's action might be open to question, the Head of Post should be consulted beforehand. He will be guided, in his decision, by the need to avoid any unfavourable publicity which might reflect discredit on Canada. (See *Official Instructions* 1-23-20).

**IMMUNITY**

Since Diplomatic Immunity is granted to representatives of Canada abroad in the interests of the Canadian Government, then it follows that the individual cannot himself renounce his immunity to local jurisdiction. Only the Canadian Government has the power to waive the immunity enjoyed by a Canadian Foreign Service Officer. The wife and children of a Foreign Service Officer accredited to a Diplomatic Mission enjoy the same rights to Diplo-

**IMMUNITY (cont'd.)**

matic Immunity and in the same degree as the Foreign Service Officer himself. A member of a Mission who becomes involved in an unpleasant situation where local authorities or officers of the law are called in, should immediately claim immunity, report the matter to the Head of Mission and write out a full account of the circumstances. (See *Official Instructions* 1-23-0).

**CALLING CARDS**

Trade Commissioners posted abroad can order calling cards for themselves and for their wives on departmental requisition. Orders must be placed well in advance. (See *Official Instructions* 10-11).

Apart from the standard use that is made of calling cards the following points of practice are in good taste:

- (a) The top right hand corner of a card left in person should be bent.
- (b) Only the husband's card should be sent to an unmarried man.
- (c) Two cards of the husband and one of the wife should be sent to a married person.
- (d) If local practice calls for cards to be left at the door of the host or hostess, this should be within the forty-eight hours following a formal party.
- (e) The following initials may be written on the face of a card as appropriate:

p.c.	--	pour condoléance
p.p.	--	pour présenter
p.f.	--	pour féliciter
p.p.c.	--	pour prendre congé
p.r.	--	pour remercier
p.f.n.a.	--	pour fête de nouvelle année

**OFFICIAL MOURNING**

Notice of official Canadian observation of mourning will be sent from Ottawa. Failing instructions to the contrary, it will be acceptable to wear sombre clothing (*black ties for men*). F.S.O.'s should refrain from entertaining officially, but may entertain unofficially in an unobtrusive manner. Invitations to attend formal functions other than for charitable purposes should be declined.

Local mourning should be in accord with local practice.

**FLAGS:**

The Red Ensign (*the Union Jack in the top left corner and the Arms of Canada on the fly on a red background*) is appropriate when the occasion requires a distinctive Canadian flag. The flag is flown only between sunrise and sunset.



**FLAGS:** (cont'd.)

- (a) It is flown at the mast head on the Sovereign's Birthday, Dominion Day, national holidays of the country in which the post is situated, national holidays of other countries represented in the same city (*depending on local custom*) and during the stay in port of a Canadian naval vessel.
- (b) It is flown at half mast on the death of the Sovereign, a member of the Royal Family, the Governor General, the Prime Minister, the Head of a foreign state with which Canada has diplomatic relations or which is recognized by Canada, the Pope, a local dignitary or member of the diplomatic corps. (*The "half-mast position is arrived at by running the flag up to its maximum height and then lowering it by the width of the flag."*)
- (c) When two flags are flown together the place of honour is the one on the left as seen by the spectator.
- (d) When flying the flags of several countries, arrange them from left to right alphabetically.
- (e) When in a procession the place of honour is at the right of the line or in front of the centre of the line.
- (f) If a flag is hung on a wall it should be arranged as though the pole were on the left as seen by the spectators.
- (g) If a flag is used to drape a coffin that part at the top next to the flag pole should be placed at the head of the coffin over the left shoulder of the deceased.

**N.B.** Never fly the flags of separate countries one above the other on the same staff.

**HONOURS AND AWARDS**

It is the policy of the Government to oppose the granting of decorations to Canadian citizens except in cases associated with the saving of life, or military operations. (*See official Instructions 1-90*).

**NATIONAL ANTHEM**

Both "God Save the Queen" and "O Canada" are recognized as National Anthems of Canada.

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## \* \* \* REPRESENTATION COSTS \* \* \*

*This paper cancels T.C.S./O.I. 58-13 dated 31 March 58*

1. The responsibility for determining the best way in which to spend his representation allowance rests with the individual Trade Commissioner. In order to discharge this responsibility intelligently he should have a knowledge of that part of his representation and living allowance which is paid to him purely for representation. Roughly speaking, officers in Grades 1, 2 and 3 can work out the representation component of their allowance by taking 20% of their gross pay and allowances. For example the gross annual pay and allowances of a married F.S.O.2 (second step) living at a post with an index of 132 would be \$10,452. His representation component would be \$2,090. A married F.S.O.5 (third step) at a post with an index of 160 would receive \$19,380. in this case the representation component would be \$4,845.

2. As a result of a survey conducted by the Department of External Affairs it would seem that about half of the representation component is spent on direct items such as dinner parties, cocktail parties, flowers, etc., whilst the other half goes for indirect items considered as "overhead". On this basis the average officer should expect to spend one-half of the representation component of his allowances (or 10 to 12½% of his total pay and allowances) on entertaining in its various forms. The method of spending his representation allowance to best advantage will vary from officer to officer. It is nowhere intended to direct how the money is to be spent, but rather to guide officers in ensuring that all the representation component is spent to the best advantage.

3. Since 1958 officers have been reporting quarterly on their expenditures of direct representation (see *Official Instruction 3-11-3*). There are two advantages to this Departmental requirement. First it gives the officer who is making up Form TCS 16 a close look at the use he has been making of his representation component, and second it gives the Department an overall picture of its representational activities throughout the world. It is the head of post who coordinates these reports for dispatch to Ottawa and who is expected to provide continuing advice to his junior officers in the matter of their representational activities.

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*Original 3 January 61*

## \* \* \* RECEPTIONS \* \* \*

1. The value and effectiveness of Trade Missions and Trade Fairs can sometimes be enhanced by a well organized reception. However, Treasury Board will only consider granting special funds for such receptions where:

- (a) it can be demonstrated that the Trade Commissioner concerned has regularly used his representation allowances in full, and that,
- (b) to require the Trade Commissioner to use his representation allowances for the reception would create hardship for the officer concerned.

*N.B.* It has been suggested that a reception costing the equivalent of three or four months representation allowances might be considered as "hardship".

2.. Trade Commissioners are expected to be able to cover the costs of some receptions by planning them as part of their annual representational activity. Many of the people that they would entertain in any case can be included in such receptions.

3. Costs may also be covered by pro rata sharing the expenses of a reception between 2 or more F.S.O.'s at the post or persuading Canadian firms and/or their agents to absorb part or all of the cost. With respect to the latter alternative, some success has been had recently for trade fairs by suggesting shared cost of a reception at the time of the initial approach to potential exhibitors by the commodity officers.

\* \* \*

*Original 3 January 61*

## ★ ★ ★ REQUESTS FOR CONFERENCE SPEAKERS ★ ★ ★

1. The number, frequency and popularity of business conferences, economic seminars and trade symposiums, particularly in the United States, has, for a variety of reasons, increased in recent years. Occasionally some of these meetings of minds are concerned with Canadian affairs, and consulates and Canadian trade officers are often asked to help organize panels of Canadian speakers.

2. Since the current trend may presage a growing demand for Canadian participants in such events it might be useful to review experience both at posts and in Ottawa in meeting this problem, and to consider certain factors which must influence the degree of help offices can provide.

3. The three main considerations are the purpose and prestige of the conference or seminar; the limited pool of prominent, able, and available Canadian speakers; and the time allowed to find them.

4. In his own territory the Trade Commissioner is clearly the best judge of the prestige status of such conferences organized by either business associations or universities. He will naturally avoid committing his own resources or the Department's to these projects unless he is sure that the returns in trade publicity are worth the efforts. When major conferences are called by organizations or groups of national importance on the subject of relations with Canada he can expect all the help that the Department can provide.

5. It is at this point that the second factor comes most sharply into focus. Whereas meetings of learned societies are more concerned with the professional quality of their speakers' papers than with their personalities or newsworthiness, organizers of the type of business conference with which we are concerned look for both. They usually prefer "name people" who can put on an impressive performance — the address itself can always be re-searched by a good ghost!

6. Consider, for example, what subjects might titillate Canadian-American business groups: investment, and its ownership and control; access to markets; taxation; materials policy; and others. For obvious reasons it is not always possible for senior government officials to represent Canada by speaking at such conferences. Similarly, of the top business executives available, numbers of them are the heads of United States subsidiaries and may be inhibited from taking a position on controversial questions which would advance the Canadian point of view. These and other like considerations reduce the supply of prominent, newsworthy speakers who can give us strong, colorful representation. The remaining, available, gallant few carry a correspondingly heavy load.

7. The third factor — the time allowed to find speakers — is important. Speakers on any one subject can only be solicited individually and one at a time. In a recent exercise we had to go through a list of sixteen possible speakers, one at a time, before finally — more by luck than anything else —

getting a speaker eminently suited for the task. In this process, time runs out fast. It is when one considers the possibility of having to find speakers for two or even, say, three more or less simultaneous conferences that the problem becomes really acute and these guidance observations have particular relevance.

8. If it is decided that a conference warrants any background participation by the Department, clearly we will want to get the best possible speakers to represent the Canadian point of view. We would like to offer every speaker a clear six weeks from time of acceptance to making the speech. To this must be added at least six weeks to select and obtain the type of speaker desired. Obviously we cannot be inflexible in matters like this, but, if we could, we would make a rule that we must have a minimum of four clear months notice of an impending conference before Departmental cooperation can be given.

9. When next you are approached by a committee organizing a conference which seems worthwhile, it would be most helpful if you could ensure, 1) adequate time, 2) the very earliest indication of the conference theme and specific topics, 3) that we receive complete details of the speaker's honorarium, and 4) who the other speakers or panelists are expected to be. This latter is particularly important since it obviously will influence our choice of speakers - and their willingness to accept.

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*Original 3 January 61*

## \* \* \* ARTICLES FOR PUBLICATION \* \* \*

*This paper cancels T.C.S./O.I. 58-12 dated 26 March 58*

1. Trade Commissioners may be approached by Canadian publications with a request for articles on some facet of the Trade Commissioner's territory which would interest their readers. There are several reasons why such requests should be referred to the Department for instructions before preparing the article in question. First of all, there must be an overall control of what is written by Trade Commissioners in Canadian publications to avoid any possible embarrassment to the Department due to the Trade Commissioner being unfamiliar with some particular phase of government policy (see O.I. Section 1-24-13). Secondly, a Trade Commissioner's writings should, in the first instance, be available to "Foreign Trade". Thirdly, it is desirable to get departmental clearance before undertaking the work involved in preparing it so as to avoid the risk of such work not being used.

2. Trade Commissioners may also receive requests from publications in their territories for articles or messages. The decision as to whether to accede to such requests rests with the Trade Commissioner, and should depend on the standing of the publication in question, as well as the advantage to his office. Before writing such an article the Trade Commissioner would be wise to consult with the Head of Mission and, in any event, should consider the possible application of Official Instruction 1-24. An English language version of any such articles together with a copy of the publications in which they appear would be useful to the Department for information purposes.

3. Local newspapers which are producing special supplements on Canada often want the prestige of including in the supplement an article by a leading government figure as evidence of Canadian government support. The Trade Commissioner should not place himself in a position of possible embarrassment by guaranteeing that such an article will be forthcoming. It is only after a careful examination of the Trade Commissioner's reasons in favour of such a request, supported by a copy of the publication and detailed information on its circulation, importance and reputation, that a decision will be made at Head Office. Requests for messages or articles written by cabinet ministers should be discouraged except under very special circumstances which lead to direct benefit to Canada.

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*Original 3 January 61*

## \* \* \* USE OF CANADIAN PORTS \* \* \*

*This paper cancels T.C.S./O.I. 58-5 dated 6 February 58*

1. There is a continuing problem with respect to the diversion of Canadian exports and imports through United States ports, with consequent loss of revenue for Canadian inland carriers and port industries and of traffic for shipping serving Canadian ports. Statistics showing the volume and kinds of diverted traffic are circulated annually to Trade Commissioner offices in D.B.S. publication entitled, "Exports of Canadian Produce to Overseas Countries Via the United States and Via Canadian Ports."
2. The Canadian Port Committee, formed in 1952 with representatives from national trading, carrier and port organizations, is constantly keeping the problem under review and examining steps which can be taken to encourage the use of Canadian ports. The Department is represented on the Port Committee by a member of the Transportation and Trade Services Division.
3. Trade Commissioners are well placed to know of instances when shipments have been made through a United States port which might more economically have been made through a Canadian port. Such instances should be reported to the Department in detail. From study of these cases the Port Committee could draw to the attention of traders how existing Canadian facilities can provide comparable service or could suggest improvements to Canadian facilities to minimize repetition.
4. At the same time there may be occasions when a Trade Commissioner will be in a position to exercise a persuasive influence on foreign traders to route their shipments through Canadian ports. Where they have objections to such a course, the reasons for routing shipments through United States ports would be of interest to the Port Committee.

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*Original 3 January 61*

\*\*\* ASSISTANCE TO CANADIAN IMPORTERS \*\*\*

*This paper cancels T.C.S./ Admin. 60-12 dated 13 April 60*

1. Trade Commissioners are not expected to seek out import opportunities unless requested to do so by a Canadian firm. Canadian importers have equal right to the services of our offices abroad with Canadian exporters.
2. In the case of foreign exporters who ask assistance in marketing their products in Canada, it is customary to refer them to their own trade promotional service unless the enquiry seems likely to be of interest to a specific Canadian firm.
3. Any sudden increase in the number of requests for assistance from foreign exporters should be reported to the Department.

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*Original 3 January 61*



## \* \* \* ASSISTANCE TO OTHER COUNTRIES \* \* \*

*This paper cancels T.C.S. O.I. 59-2 dated 16 January 59*

1. Requests for lists, information and assistance may sometimes be received from colleagues in other missions or from visiting non-Canadian businessmen who do not have a representative in the Trade Commissioner's territory. This is most likely to occur in the case of other Commonwealth countries.
2. It is our approved practice to answer enquiries from other Commonwealth governments seeking information on specific subjects by giving full information except where such a course might adversely affect Canadian interests.
3. Friendly assistance can often be rendered without compromise and with the benefits of appreciation. Nevertheless, a tactful refusal is always in order, as, for example, if assistance would reduce the effectiveness of the Trade Commissioner's trade promotion activities. (*Official Instructions 8-67*).
4. Information on our own procedures (e.g. pay scales, allowance structure) and practical assistance (e.g. helping a newly arrived colleague to become established or even organize a trade fair participation) should be looked at in the light of whether compliance will eventually mean benefit or loss to Canada. The introduction of non-Canadian business men to local business men and government officials should, of course, be handled so as to ensure that the Canadian government does not become officially involved.
5. In particular the furnishing of lists of Canadian firms to people not strictly within a Trade Commissioner's territory must be examined in the light of the possibility that the firms on the list might resent being identified. Most such requests for lists of firms can be handled by referring the person concerned to a copy of the Canadian Trade Index (*Official Instructions 8-66*).

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*Original 3 January 61*

## \*\*\* ACTING HEAD OF MISSION ALLOWANCE \*\*\*

1. An application to receive "Acting Head of Mission Allowance" should be made to the Department of External Affairs and a copy of the application forwarded for information to the Department of Trade and Commerce. Reference is made to "Official Instructions 3-21-30."
2. The amount of the extra monthly allowance can be arrived at by taking one-twelfth of the adjusted aggregate post allowance, and multiplying it by .1050. For example, the Head of Mission of a \$20,000. post may, by the time DBS has adjusted his allowances, be receiving \$17,575. as his complete annual living and representation allowance. At such a post, if the Trade Commissioner were to become Acting Head of Mission, he would receive one-twelfth of \$17,575. multiplied by .1050. This works out to \$153.78 per month.
3. It is not possible to receive Acting Head of Mission and Acting Head of Post allowances simultaneously. There are circumstances under which the Acting Head of Post allowance authorized by the Department of Trade and Commerce can be more to a Trade Commissioner's benefit.

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*Original 3 January 61*

\*\*\* TERMINATION OF CLUB ALLOWANCES \*\*\*

1. On final departure from his post, an F.S.O. will not be required to make pro rata reimbursement to the Department of club fees for his term of unexpired club membership. To keep this to a minimum, however, advance payment of club fees for more than one year must be avoided. F.S.O.'s may be required to obtain a written statement from their club that the unexpended portion of an advance payment cannot be recovered.

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*Original 3 January 61*

## \* \* \* ABSENCE OF WIFE FROM POST \* \* \*

1. As an element in the difference between married and single allowances provides for the representational function of an F.S.O.'s wife, it follows that her absence from the post can have an effect on his income from the Department. It is for this reason that the prolonged absence (*over thirty days*) from the post of an F.S.O.'s wife (*or dependent who acts as his hostess*) needs to be reported to the Department. Each case will be considered individually in order to determine whether there should be any adjustment of allowances.
2. When necessary the matter will be referred to Treasury Board as they wish to consider all cases where it is proposed to continue the payment of married allowances during the absence of an officer's wife with the possible exception of certain cases of illness and vacation.

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*Original 3 January 61*

## \* \* \* LANGUAGE TUITION FEES \* \* \*

*This paper cancels T.C.S./O.I. 58-7 dated 10 February 58*

1. In order to reduce unproductive correspondence, it has been decided to give automatic and continuing authority to Trade Commissioners for the study of the language of the country at those posts where more or less automatic approval of such studies has been given in the past.

2. Officers wishing to study the following languages may on the authority of the senior Trade Commissioner incur tuition fees for their study in the post indicated.

<i>Spanish</i>	Bogota, Mexico, Guatemala, Ciudad Trujillo, Lima, Santiago, Buenos Aires, Montevideo, Caracas, Madrid, Havana.
<i>Portuguese</i>	Rio de Janeiro, Sao Paulo, Lisbon.
<i>German</i>	Bonn, Hamburg, Berne, Vienna.
<i>Dutch</i>	The Hague.
<i>Flemish</i>	Brussels.
<i>Danish</i>	Copenhagen.
<i>Italian</i>	Rome.
<i>Greek</i>	Athens.
<i>Afrikaans</i>	Cape Town, Johannesburg.
<i>Chinese</i>	Hong Kong.
<i>Norwegian</i>	Oslo.
<i>Swedish</i>	Stockholm
<i>Japanese</i>	Tokyo.

3. It should be emphasized that this list in no way excludes the possibility of studying, at Government expense, other languages, which may be approved on an individual basis by headquarters as has been done in the past.

\* \* \*

Original 3 January 61

## \*\*\* EDUCATION LEAVE \*\*\*

1. In exceptional circumstances, education leave may be granted to Trade Commissioners if satisfactory arrangements can be made for the continuation of their work while they are absent. Usually such leave is granted on a "without pay" basis. However, in certain cases leave with full pay may be granted to take a short course when the result will be of direct value to the Trade Commissioner service. In certain other cases, leave with half pay may be granted to assist the Trade Commissioner to do post-graduate work of special interest to the Department.

2. All requests for education leave should be submitted with full details to the Assistant Director (Personnel) as far in advance as possible.

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*Original 3 January 61*

## \* \* \* ASSISTED LEAVE \* \* \*

1. The following review of some of the considerations governing assisted leave might be useful to Officers stationed at hardship posts (either "C" or "D"). The practice has developed of allowing foreign service personnel at hardship posts to take leave at other than the approved centre and claim reimbursement of actual expenses up to the amount that would have been paid. This has the blessing of Treasury Board. (Obviously the alternative location must not itself be a "C" or "D" post as this would be tantamount to conceding that the conditions at the latter post are not severe enough to warrant any leave assistance!)
2. It has been recently recommended that our personnel in Karachi should be permitted to proceed to a hill station in Ceylon. There would appear to be no objection to this request as long as the place chosen were not Colombo itself, which is a "D" post.
3. Personnel at "Iron Curtain" posts, for example Moscow, are permitted to go outside the country of the post in order to obtain relief from psychological strain; it would not therefore be in accordance with the intent of the regulations if such leave were taken in another country behind the Iron Curtain.
4. Form CT 110 should show the actual expenses incurred travelling from the hardship post to the alternate resort chosen, substantiated by vouchers, together with the established cost of return transportation to the approved leave centre.

\* \* \*

*Original 3 January 61*

## \*\*\* EXCESS EDUCATION COST \*\*\*

*This paper cancels T.C.S./ADMIN. 59- 5 dated 7 July 59.  
T.C.S./ADMIN. 60-13 dated 29 April 60.*

1. There are certain circumstances under which an F.S.O. or F.S.E. may be reimbursed for education cost in excess of the standard education allowance. Each case, however, must be the subject of an individual submission to Treasury Board which will decide each one on its own merits.
2. In reaching a decision on each case Treasury Board have, in the past, taken into consideration financial hardship as well as the standard of educational facilities at the post. In some cases, excess cost in countries other than Canada or the country of the post have been reimbursed.
3. F.S.O.'s and F.S.E.'s who feel that they have been subject to excessive education cost, which results directly from their posting, are invited to submit such cases to the Assistant Director (Administration) at the close of each school year. The submission should be accompanied by receipts and a detailed statement in duplicate covering the inadequacy of the educational facilities at the post. If, in the view of the Department, there is a good case to be made, the case will be submitted to the Board on behalf of the F.S.O. or F.S.E. concerned.

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*Original 3 January 61*



**\*\*\* SHARING ENTERTAINMENT \*\*\***

1. When a general reception, of value to the work of more than one officer, is held, it may be appropriate to share the costs amongst the officers concerned. Each officer might be assessed according to his allowance grade.

2. If the event is one in which the Department of External Affairs has an interest, the possibility of inviting their officers to participate on this same basis should not be excluded.

(See also Guidance Paper #103, dealing with sharing of reception costs with Canadian firms or their agents.)

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*Original 3 January 61*

\*\*\* REMOVAL EXPENSE CLAIM (ADVANCES) \*\*\*

1. Because the processing of removal expense claims may be delayed, the Department is prepared to make F.S.O.'s and F.S.E.'s an advance on claims. The advance can never exceed the total amount of the claim less any initial advance already received. It should be remembered that this advance in no way implies the Department's approval of the accounts in process. As soon as the removal expense claim has been fully processed, any monies owing to the Crown must be refunded immediately.

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*Original 3 January 61*

## \* \* \* HOUSEHOLD EFFECTS \* \* \*

1. There is a very strictly applied limitation on the amount of household effects that foreign service personnel may have moved at public expense (O.I. 5-37). This limitation establishes ceilings for both weight and volume neither of which may be exceeded.
2. In obtaining removal bids from moving companies it should be remembered that if the quotation is on a "per cubic metre (or yard)" basis there is a very real danger that the company might be tempted to make the unit cost low enough to eliminate their competitors and then make a large profit by deliberate wastage of space.
3. If this should result in the volume ceiling being exceeded, the excess will not be accepted for payment by the government. In order to avoid the possibility of deliberate wastage in packing and, at the same time, to prevent the paying of exorbitant removal sums by the government, it is suggested that bids be obtained on a "total job" basis. The effect of this is that the moving company agrees to move all an F.S.O.'s household effects from A to B without exceeding either the weight or volume figure they have calculated.

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*Original 3 January 61*

**\*\*\* ALTERNATIVE TRAVEL ROUTES \*\*\***

1. When an officer is travelling on duty, the desire to arrange his itinerary to suit personal plans is understandable. However, if such arrangements should result in costs higher than by the most direct route, then the individual must be prepared to absorb the extra amount. In addition, if extra time is involved, it must be charged against the individual's statutory leave credit.

2. When this situation arises, the Department should be advised of the route the F.S.O. or F.S.E. wishes to take. If travel by the desired route is approved, the Department will then work out, on the basis of the most economic route, the amount up to which actual and allowable expenses will be reimbursed.

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*Original 3 January 61*

\*\*\* HOTEL EXPENSES (T.C.'s Wives) \*\*\*

1. When a Trade Commissioner travelling at government expense is accompanied by his wife whose expenses are not a proper charge on his C.T.110, there is no need to split the hotel expenses by some arbitrary fraction. The proper procedure, and one which has the blessing of Treasury Board, is to obtain from this hotel a statement as to the single rate applicable to the room actually occupied and show this amount on the C.T.110. This statement may be a separate piece of paper or merely an endorsement on the face of the hotel bill.
2. Where the rate is the same for single or double occupancy, and the voucher makes this clear, the full amount paid for the room is a proper charge on the Trade Commissioner's expense account.

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*Original 3 January 61*

\*\*\* PERSONAL INVENTORIES \*\*\*

1. A new form T.C.S.2 was recently sent to all our posts, abroad on which to record the details of their household and personal effects. The filling in of this form before a move is now required by Treasury Board before any removal claim will be considered (*Official Instructions 5-55-1(a)*). In the event of any claim against the government for loss or damage, such a form is indispensable as a basis for settlement. The greater the care in completing the form, the quicker and fairer will be the settlement.

2. Specific instructions as to the way in which the personal inventory must be completed are contained in Amendment No. 1 to Official Instructions. Trade Commissioners may find the following check-list useful in drawing up their inventories:

**Living Room**

Carpets & rugs  
 Tables  
 Chairs  
 Chesterfields  
 Desks  
 Table Lamps  
 Standing Lamps  
 Vases  
 Piano  
 Sheet Music  
 Phonograph  
 Records  
 Musical Instruments  
 Radio  
 Clocks  
 Pictures  
 Mirrors  
 Curtains  
 Draperies  
 Bookcases  
 Books  
 Ornaments  
 T.V.

**Halls**

Carpets & rugs  
 Tables  
 Chairs  
 Hall Seat  
 Coat Stands  
 Mirrors  
 Clocks  
 Lamps  
 Pictures  
 Curtains  
 Draperies

**Dining Room**

Carpets & rugs  
 Tables  
 Chairs  
 Tea Wagons  
 Buffet  
 China Closet  
 Serving Tables  
 Electric Utensils  
 Candle Sticks  
 Pictures  
 Mirrors  
 Curtains  
 Draperies  
 Table Linens  
 Table Cloths  
 Lunch Cloths  
 Napkins  
 Fancy Covers  
 Silverware  
 Flat Silver  
 Silver Dishes  
 Chinaware  
 Dinner Sets  
 Glassware  
 Ornaments

**Breakfast Room and Pantry**

Floor Covering  
 Tables  
 Chairs  
 Electric Utensils  
 Chinaware  
 Glassware

**Kitchen**

Floor Covering  
 Tables  
 Chairs  
 Cutlery  
 Kitchen Utensils  
 Kitchen Cabinets  
 Stoves  
 Cookers  
 Refrigerators  
 Sweepers  
 Clocks  
 Tools  
 Electrical Toasters, Grills

**Each Bedroom**

Carpets & Rugs  
 Beds  
 Mattresses  
 Chairs  
 Dressers  
 Toilet Sets  
 Tables  
 Mirrors  
 Lamps  
 Draperies  
 Pictures  
 Bed Clothing

**Sewing Room**

Carpets & Rugs  
 Sewing Machine  
 Tables  
 Chairs  
 Sewing Stands  
 Sewing Baskets

**Miscellaneous Items**

Cameras  
 Microscopes  
 Sporting Equipment  
 Jewellery

**Basement, Laundry & Attic**

Washing Machines  
 Electric Irons  
 Mangles  
 Tubs  
 Boilers  
 Ironing Boards  
 Trunks  
 Luggage  
 Chests

**Bath Rooms**

Medicine Cabinet  
 Tables  
 Linen  
 Towels  
 Bath Mats  
 Scales

**Women's Clothing****Garage and Outhouses**

Auto Tools  
 Auto Accessories  
 Tools  
 Lawn Mowers  
 Garden Tools  
 Porch Furniture

Coats, Cloth  
 Coats, Fur  
 Suits  
 Dresses  
 Skirts  
 Shoes  
 Hats  
 Lingerie

**Men's Clothing**

Suits  
Overcoats  
Sport Clothes  
Shoes  
Hats and Caps  
Shirts  
Ties  
Sweaters  
Underclothing

**Children's Clothing**

Coats  
Suits  
Hats and Caps  
Dresses  
Shoes  
Sweaters  
Underclothing

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## \* \* \* POSTING PROCEDURE \* \* \*

A knowledge of the Head Office administrative side of the posting of foreign service personnel might be useful. This paper is intended to cover departure from Ottawa as well as departure from a post abroad. There are so many points in common to both cases that separate papers would include unnecessary repetition.

The initial step, as far as personnel abroad are concerned, is the arrival of a letter in which advice of the posting is given together with approximate dates. This letter should be acknowledged to the attention of the originator, but letters written about transportation or tour matters which do not go on the F.S.O.'s or F.S.E.'s personal file, should be written separately and addressed as shown in items 3 and 4.

**N.B.** Normally, the only letters to the Director are those concerned with the fact of a posting; the details are handled by the officers noted below and letters should be addressed accordingly.

**OFFICIAL MATTERS** — Here are the main elements:

On notification of Posting

1. **Post Report of Country of Destination — Assistant Director (Personnel).**  
Read the post report carefully; make note of any matters on which you have queries. RETURN THE REPORT PROMPTLY.
2. **“Official Instructions” — Assistant Director (Admin.).**  
Carefully review chapters 4 and 5 of Official Instructions dealing with travel and removal. F.S.E.'s have access to Official Instructions through their chief abroad or the Assistant Director (Personnel) in Ottawa.
3. **Travel Arrangements — Assistant Director (Admin.).**  
If leaving from a post, the F.S.O. or F.S.E. is asked whether he wishes to make his own travel arrangements or have them made for him by the Department. If the former is the case, of course, the arrangements are subject to departmental approval. In either case every effort must be made to arrange for travel by the least expensive route in a class consistent with the person's status and in accordance with official instructions on travel (See *O.I.* 4-20 to 4-29). The post to which the F.S.O. or F.S.E. is destined and any other post touched en route will be kept advised of the person's itinerary.
4. **Tour of Canada — Assistant to the Director — *O.I.* 6-12-1.**  
F.S.O.'s who are to make a tour of Canada should ensure that all arrangements for the tour are coordinated at Head Office well in advance.
5. **Medical Examination — Assistant Director (Personnel). — *O.I.* Section 5-10.**  
On first departure from Ottawa, on transfer between posts and on return to Ottawa from a post abroad an examination is necessary to protect the health of F.S.O.'s, F.S.E.'s and their dependents.

**5. Medical Examination (cont'd.)**

The necessary appointments will be made to suit the convenience of the individual concerned. When personnel are cross-posted, the necessary forms for medical examination are sent to the Trade Commissioner so that he can arrange for local medical examination.

**6. Passport Photographs – Assistant Director (Personnel).**

The Department is able to arrange for sittings at the National Film Board without charge to the F.S.O., the F.S.E. or their dependents. Times can be arranged to suit the individual.

**7. Passport Applications – Assistant Director (Admin.).**

New passports or renewals required in Ottawa are all handled by this office. A supply of application forms is on hand at all times and the necessary photographs can be obtained from the Assistant Director (Personnel).

**8. Posting Loan – Assistant Director (Admin.) O.I. Section 5-85.**

After discussing this matter with the Assistant Director (Administration), the individual should fill in and return to him form T.C.S.1, which the Assistant Director (Admin.) then submits to the Director.

**9. Appliances – Assistant Director (Admin.) – O.I. Section 12-42 and 12-61.**

Any need for departmental purchase of appliances for use at the next post should be discussed with the Assistant Director (Admin.).

**10. Housing – Assistant Director (Admin.) – O.I. Chapter 12.**

Conditions of housing, and especially accommodation provided or furnished by the Department, should be discussed with the Assistant Director (Admin.).

**11. Accreditation**

When an F.S.O. is posted or transferred, we send the Department of External Affairs a letter requesting that the officer be accredited to the country concerned. This usually means that he will be accorded full diplomatic privileges. When a posting is to a mission, we request that the head of mission be informed. A copy of the officer's curriculum vitae is enclosed.

**12. Leave – Assistant Director (Personnel) – O.I. 2-1-7.**

Personnel planning to take leave before departure from a post abroad or en route should ensure that their plans are known to and approved by the Department. The Department is then in a position to see to it that all concerned are advised. This is particularly important in order to ensure the proper and prompt payment of allowances. Application for leave, Form CSC 263 should be completed in advance.

*Three months in advance***13. Invitation and Calling Cards -***Assistant Director (Admin.) - O.I. Sections 10-11 and 10-12.*

Requisitions for invitation cards and calling cards for F.S.O.'s and their wives may be placed through this office.

*Well before departure***14. Shipment and/or Storage of Effects -***Assistant Director (Admin.) - O.I. Sections 5-31, 5-32, 5-33, 5-36, 5-37 and 5-55-1 (a).*

- (i) Obtain a list of reliable packers and movers, select at least two firms from the list and get estimates for packing. Personnel planning to ship part of their effects and to store the balance must make this clear to the packing firms in order that the estimate will be submitted in two parts.
- (ii) Complete an inventory of personal and household effects to be shipped and/or stored (*Form T.C.S.2*). (No removal account will be accepted unless the inventory has been completed.)
- (iii) If household effects are being shipped to Canada from abroad, complete Department of National Revenue form "C-6" and Department of Agriculture form "EXT 346". The former concerns the length of time that goods purchased abroad have been owned while the latter concerns the freedom of the packing materials from foot and mouth disease.
- (iv) Request the Director, through the Assistant Director (Admin.), for permission to ship and/or store personal and household effects, enclosing the estimates received and the personal inventory.
- (v) In Ottawa, the Traffic Officer will be advised which estimate has been accepted and will in turn notify the firm selected.
- (vi) New purchases being shipped direct to the packers from the manufacturer may, if of major size, be shipped at departmental expense. Minor items should be handled at personal expense. The Traffic Officer should be kept advised of such shipments.
- (vii) Personnel wishing to ship effects which are not in Ottawa must discuss such matters with the Assistant Director (Admin.) in order that the most advantageous shipping arrangements may be made.
- (viii) The intention to make household purchases en route to a post must be reported to the Assistant Director (Admin.) with an explanation as to why this is necessary. The Director's approval of such shipments is required if forwarding costs are to be at departmental expense. The personal inventory must also be amended accordingly.

*Note:* Lengthy storage prior to shipment is costly. Care must be exercised to ensure that as short a period of time as possible exists between delivery of goods to the packers and shipment date. Storage arrangements must be discussed with the Assistant Director (Admin.).

(ix) All personnel should take careful note (see *O.I. Section 5-37*) that the weight and volume maximums:-

I apply to the combined total of goods shipped, goods stored and goods purchased en route and shipped at government expense, and

II mean that neither limit may be exceeded.

**N.B.** The Department does not pay insurance charges; insurance on effects is a personal matter.

**15. Shipment of Automobile -**  
*Assistant Director (Admin.) O.I. Section 5-45.*

F.S.O.'s buying an automobile may request the Director, through the Assistant Director (Admin.), for permission to ship it to the post at departmental expense. Once this has been obtained, the manufacturer should be asked for information on model, weight, length, value, delivery date, etc., for the use of the Assistant Director (Admin.) in order that arrangements may be made for shipment. Diplomatic prices of Canadian manufactured cars together with illustrations and other information on automobiles are kept on file in Ottawa.

**16. Tropical Clothing Grant -** *Assistant Director (Admin.) O.I. Section 5-80.*  
Personnel, posted to a tropical post, will automatically receive the grant if such allowance has not been accorded within the previous 5 years.

**17. Purchase of Luggage -** *Assistant Director (Admin.) - O.I. 5-90-1.*  
Personnel requiring luggage may find it possible to arrange for a discount on luggage purchases. 50 per cent of the approved net cost of luggage may be claimed under Dislocation Expenses.

**18. Personal Document Information -** *Assistant Director (Personnel).*  
Make sure that the personal information on file is up-to-date.

*Three Weeks Before Departure*

**19. Advance for Removal Expenses -**  
*Assistant Director (Admin.) O.I. Section 5-15.*

Application for an advance for removal expenses should be made to the Director, through the Assistant Director (Admin.), in writing, giving a breakdown of the amount required.

20. **Cheque Deposits – Assistant Director (Personnel).**  
Personnel whose cheques are not already being deposited in their banks should advise which bank and account should be credited each month with pay and allowance payments.
21. **Heavy Luggage**  
Make arrangements to have heavy luggage delivered to the station at the time required. (See *Guidance Paper 406*).
22. **Hotel Accommodation in Ottawa – O.I. Section 5-50-1(a).**  
This may be arranged personally or through the Assistant Director (Admin.). Personnel are reminded, not only that there is a limitation as to the number of days the Department will pay expenses, but also that a certificate that such charges are necessary must accompany the removal expense account.

Three Days before Departure

23. **Ottawa Appointments**  
Arrange appointments through their secretaries to see the Director and the Executive Director.
24. **Tickets and Passports**  
Pick up tickets and passports; their accuracy is the responsibility of the traveller.
25. **Travellers' Cheques – O.I. 4-74.**  
If you need travellers' cheques, the cost may be included in your Removal Expenses. It's wise to carry travellers' cheques in U.S. dollars. (In many countries it is useful to carry a modest sum of U.S. dollars in small denominations for incidental expenses immediately on arrival or just before departure.)
26. **Expense Claim Form**  
Obtain a sufficient supply of forms C.T.110 (Rev.). Removal Expense claims must be submitted in duplicate.
27. **Dislocation Expense Forms – Assistant Director (Admin.) – O.I. Section 5.90.**  
Obtain from T.C.S.15. Dislocation Expenses are to be submitted in triplicate. Because only one claim is permitted for each removal you should hold your claim until all items are complete. Advances on these claims are not made.

**PERSONAL MATTERS** – Here are some suggestions and reminders:

On notification of Posting

28. **Letter To Post of Destination**  
As soon as the Post of Destination has been notified of the appointment, personnel may wish to write for further advice on educational facilities, housing, last-minute training, use of appliances, etc. Such a letter should not be written until the post report has been read.

After Decision as to Departure Date**29. Release of Accommodation**

Make arrangements to cancel leases and vacate premises. The effective date of cancellation of lease or vacation of premises must be as close to the date of departure as possible. Notify the Assistant Director (Admin.) of the effective date on which the premises will be vacated. Personnel who are required to continue paying rent on their accommodation after their departure must obtain written evidence from their landlord that he is unwilling to break the lease.

**30. Personal Purchases**

Personnel in Ottawa can obtain a list of those local stores offering substantial discounts on posting abroad. (Personnel abroad are reminded that articles owned abroad less than six months prior to return to Canada are subject to full duties and taxes.)

**31. Pets - O.I. Section 12-70.**

Personnel who wish to take pets to their posts abroad must first verify that pets will be allowed entry by the country of the post. Secure any necessary certificates and inoculations. All costs, including transportation, are personal expenses. It should be remembered that the keeping of pets in accommodation provided by the Department is a privilege subject to the approval of the Director.

**32. Hotel Accommodation at Post - O.I. Section 3-13.**

This can be arranged by the Assistant Director (Admin.) with the Post concerned. Personnel may be allowed full expenses for fourteen days but after that an abatement will be made in salary.

Three Weeks Prior to Departure**33. Notification of Arrival at Post**

It is a matter of departmental routine to advise the Post of Destination of the complete itinerary of F.S.O.'s and F.S.E.'s. The individual concerned would be well advised to confirm these plans in a personal letter to the post.

**34. Packing and Pick up of Household Effects**

Confirm the date the packers are due to pack and remove your effects; make sure that everything will be in readiness for the date set.

**35. Insurance on Effects**

You may wish to place marine and other insurance on your effects being shipped. Personnel who already have insurance on belongings, in premises or stored, should advise their insurance companies of the transfer and check whether coverage will remain in effect.

**36. Change of Address**

Notify your bank, insurance companies, trust companies, post office, publishers, etc. of your new address; give the full postal address for forwarding.

37. **Banking Arrangements**

Discuss with your bank the best method of transferring funds abroad. Arrange to have bank statements sent direct to the post; these should not be forwarded to or via the Department.

Three Days before Departure

38. **Travellers' Cheques**

Purchase any additional travellers' cheques for personal expenses — the cost may not be included in your removal expense account.

39. **Departmental Publications**

Return all departmental publications to the Library. Have your name deleted from circulation lists.

40. **Keys**

Return office and desk keys.

41. **Hotel Accommodation at Post**

Check as to the name of the hotel at the post where reservations have been made for you.

42. **Family Allowances — See Guidance Paper 502.**

When coming to Canada make early application for family allowances as these become payable as of the month following the date of application.

When leaving Canada advise the Department of National Health and Welfare to discontinue the allowance payments as of the date of departure from Canada.

43. **Income Tax**

When returning to Canada or departing, fill in a new form T.D.1 to reflect the changed basis of income tax deduction at source due to the change in eligibility of the children for family allowances.

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Original 3 January 61

## \* \* \* BAGGAGE HANDLING BY RAIL AND SEA \* \* \*

*This paper cancels T.C.S./ Admin. 60-11 dated 13 April 60*

One of the hazards of travel, and that which can be an irritating and time-consuming one, is the supervision of one's personal baggage. Some of the following points may contribute to the smooth enjoyment of travel to and from posts abroad:

**Identification**

It will be most useful to have several copies of a list of baggage divided to show "hand" and "heavy" in separate sections. This facilitates checking if all luggage is present as well as rapidly identifying missing items. Accompanying children can easily share the responsibility of seeing that all baggage is present.

**Availability**

The careful segregation of belongings in both hand and heavy baggage helps separate them into "wanted" and "not wanted" and will pay dividends in comfort later on. Remember that the more baggage there is in your cabin the more crowded it is.

**Shipping time**

The following table shows the number of days required to ship ex Ottawa for connection with vessels in the principal ports used by the Department:—

<u>Originating</u>	<u>Embarkation Port</u>	<u>No. of days required to connect with vessel</u>
Ottawa	Montreal	3 days
"	Saint John, N.B.	4 days
"	Halifax	4 days
"	New York	5 days
"	Vancouver	9 days
"	San Francisco	10 days

Please note that, as a general rule, the steamship companies advise that heavy baggage is accepted at the pier two days in advance of sailing date but not later than twenty-four hours prior to sailing.

**Cartage**

The movement of your heavy baggage from your house to the station is a proper charge against your removal account when supported by vouchers. The services of the Canadian Baggage Transfer Company are available in most Canadian cities (Ottawa telephone number CE 2-4028) and their representatives do not expect to be tipped.



### Checking

Once the baggage is at the station, the F.S.O. or F.S.E. must present his ticket(s) in order to utilize the free baggage allowance referred to below. Claim checks will have been received from the Canadian Baggage Transfer Company which are surrendered to the baggage master at the station in return for railway claim checks. If the baggage is being sent to a ship, there will be a transfer charge which must be prepaid and the voucher included in the removal account.

### At Ship Side

Carefully check that all baggage, heavy and hand, is actually on board the ship.

### Weight Limit

It should be remembered that first-class rail tickets entitle the holder to a free baggage transportation allowance: This is:-

(a) When sailing from East Coast ports:

150 lbs. per adult  
75 lbs. per child

(b) When sailing from West Coast ports:

350 lbs. per adult  
225 lbs. per child

Every effort should be made to utilize this allowance rather than shipping baggage by express. Take reasonable measures to ensure that this allowance is not exceeded or by only a small amount at most. This is equally true for personnel returning to Canada from abroad who are travelling by train.

### Returning to Canada by sea via New York

Coming through New York, costs are high because of the exorbitant tipping scale and the many people who must be tipped. For this reason, those who possess a ticket to a Canadian destination should arrange to have their heavy baggage shipped in bond to Canada. To expedite this, arrangements can be made to have a representative of the C.P.R. or the C.N.R. meet returning personnel on the dock and take over complete responsibility. Free storage in a Canadian customs warehouse is limited to three days, commencing on day of arrival of baggage.

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## \*\*\* ESTATE TAXES AND SUCCESSION DUTIES \*\*\*

**1. Introduction**

This paper is designed solely to provide the Foreign Service Officer with a general idea of the framework within which his estate will be subject to federal and provincial taxes after his death. Trade Commissioners with estates that appear likely to be significantly greater than \$50,000 are strongly urged to consult a solicitor respecting estate taxes and succession duties. Trade Commissioners are requested not to get in touch with the Department concerning details of how the various Acts will affect them personally.

**2. Domicile**

Generally speaking, it would be safe to assume that a Trade Commissioner serving abroad would be considered by the Canadian Courts as domiciled in Canada. To determine the province of domicile within Canada, however, is a matter for consultation with a solicitor. Decisions as to province of domicile may have marked effect on the taxes on an estate. Consider the hypothetical case of a Trade Commissioner who dies at his post abroad and leaves an estate of \$100,000 to his wife: Total taxes (federal and provincial) due on his estate would be \$11,100 if domiciled in Ontario, \$11,725 if domiciled in Quebec and \$6,200 if domiciled in any other province. If the above estate had been left to three children over 21 the figures would be respectively, \$10,850, \$12,100 and \$10,200.

It would seem likely that a Trade Commissioner who, on retirement, continues to live outside Canada would be considered by the Canadian Courts, as domiciled outside Canada. Here again, however, the Trade Commissioner should consult with his solicitor in order to be sure of his status.

**3. Estate tax - Federal****(i) Deceased domiciled in Canada**

The Federal Government levies a tax on all property, real and personal, wherever situated, which was owned by the deceased. There is a basic exemption of \$40,000 and certain additional exemptions which vary with the relationship of the inheritor to the deceased. The tax, against which certain credits for taxes due to provinces and other countries can be applied, starts at 10% of the aggregate taxable value and increases, as the value of the estate increases, to a maximum of 54%.

**(ii) Deceased domiciled outside Canada**

The Federal Government levies a tax on all property owned in Canada. Subject to a general exemption of \$5,000, it is a flat 15% of the aggregate value of the property situated in Canada.

**4. Succession Duties - Applied by Quebec and Ontario only****(i) On property situated in the Province**

A tax, the rate of which varies with the relationship of the inheritor to the deceased and the total value of the estate, is applied regardless of the domicile of the deceased at the time of death.

(ii) On property situated outside the Province

A tax, the rate of which varies with the relationship of the inheritor to the deceased and the total value of the estate, is applied when both the deceased and the inheritor were domiciled in the province at the time of death.

**5. Foreign Law**

Quite apart from any decision which might be reached by the Canadian Courts as to a Trade Commissioner's domicile, the Courts of the country in which he dies might rule otherwise. It is suggested that every Trade Commissioner should determine how his estate would be affected by local laws were he to die in the country in which he is living. It is possible that diplomatic immunity might not cover this eventuality.

**6. Pensions, Annuities and Death Benefits.**

The death benefit payable upon the death of a civil servant is included in the calculation of the aggregate value of the estate. The computed value of any pensions or annuities also forms part of the estate for tax purposes. To indicate the substantial effect this can have on the value of an estate, let us consider a hypothetical case of the death of a Trade Commissioner who has been at the top step of Grade V for three years. Based on present rates of pay, his widow would receive a pension of \$2,156 per annum. The computed value of this pension, assuming the widow to be 42 years of age, works out to \$36,477.75. It is this amount which will be added to the estate of the deceased for the purpose of arriving at the aggregate value for estate tax purposes.

An amendment to the Income Tax Act provides for relief in the matter of payment of income tax on such pensions, annuities, death benefits, etc., in subsequent years, by their recipients.

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*Original 3 January 61*

## \*\*\* WILLS \*\*\*

*This paper cancels I.S. No. 56-86 dated 11 December 56*

Those Trade Commissioners who have not as yet made a Will, or alternatively who may not be completely satisfied with the arrangements they have made, might be interested in the following information extracted from a document put out by the Montreal Trust Company:—

*Why should I make a Will?*

It is the only way by which you can provide for the management and distribution of your estate in accordance with your wishes and ensure that estate funds will be made available, when needed, for the maintenance, education, illness and other needs of your family and others.

*When should I make a Will?*

Now, while you are sound, mentally and physically. Even if you feel that your affairs are not in good condition, you should make a Will now. It can be revised later as conditions and circumstances change. It is not essential that your affairs be arranged exactly as you desire before making a Will. A Will properly made and executed will enable your executor to function under all circumstances.

*What happens if I die without making a Will?*

Your property will be divided among your heirs according to the rules of "intestate succession". This may prove to be reasonably equitable but it will not take into account the individual needs of your heirs, nor other special circumstances.

*If there is no Will would my wife inherit my whole estate?*

Your estate would be divided between your wife and children in accordance with the rules of "intestate succession". Where there are no children your estate would go either to your wife or partly to your wife and partly to your blood relations, according to the laws of the province in which you were domiciled.

*In the absence of a Will would the distribution of my estate be delayed?*

Yes, there would be delay since an immediate capital distribution is not allowed in most provinces, even to your wife and children unless an order of the Court is obtained authorizing such a distribution. If among your heirs there are one or more who are minors and whose income from their share or shares in your estate proves to be insufficient to provide for their maintenance, education or emergencies affecting them, no capital could be used for such purposes

except under an order of the Court authorizing the required payments from capital. Failure to leave a Will may necessitate the untimely disposal of estate assets, which should be held, and delay the sale of assets which should be sold.

*But as Guardian would my wife not have the use of the children's shares of the estate for their benefit?*

Your wife as guardian of your children could not obtain moneys out of the children's shares for any purpose without authority of the Court. Apart from the expense involved in obtaining this authority, there would be delay and inconvenience.

*Do I need a Will if my wife and I own everything jointly?*

Yes, if only to appoint an Executor to carry out the administrative details. Almost invariably there are some assets which have been omitted from a joint ownership which should be disposed of by your Will. Moreover, if your estate is taxable your beneficial interest in the joint ownership is subject to Estate Taxes. Further, you and your wife should make Wills to attend to matters in the event of the death of you both in a common disaster.

*I made a Will years ago — is it good for all time?*

Normally, a Will remains good until revoked but a Will should be revised from time to time and kept up to date. Changed conditions may make alterations in your Will desirable.

*What is a codicil?*

A Codicil is an addition or amendment to your Will, amplifying or altering its provisions to indicate change in your wishes. Its use obviates the need of rewriting the whole Will where only minor alterations are necessary. A codicil must be executed with the same formalities as are required for a Will.

*May I prepare my own Will?*

Yes, but it is usually a very unwise thing to do. The "home-made" Will is sometimes worse than no Will at all. A Will should always be prepared by your legal advisor.

*Must I list my property item by item, in my Will?*

No, that is not necessary nor is it usually advisable.

*Must my wife be adequately provided for in my Will?*

Generally speaking your wife must receive adequate financial support, by the terms of your Will. In most provinces the wife may apply to the Court for a greater share of your estate if the benefits provided for her under your Will are not adequate. The Court will make such order as it thinks fit and proper in the circumstances.

*Do I have to treat all my children alike?*

No, you may apportion your estate among your children as you desire but there is a statute, in most provinces, under which the Court may order that such provision as it thinks adequate, just and equitable be made out of the estate for any child considered by the Court to have received an inadequate provision.

*Must the witnesses know the contents of the Will?*

No, they are simply required to sign in the prescribed manner as witnesses to your signature but they should know that the document is signed by you as your Will.

*Does my Will in any way become public?*

No one but yourself and your legal advisor need know anything of its contents until after your death.

*May I change or revoke my Will at any time?*

Certainly. It may be varied or revoked at any time. A new Will should contain a revocation of all former testamentary dispositions made by you.

*Do I lose control of any of my assets after I make my Will?*

No. The provisions of your Will do not become effective until after your death. Your Will deals with your estate as it exists at the time of your death.

*Where should my completed Will be kept?*

In safe keeping with a bank, trust company or lawyer where it would be readily available in the event of your death. (See *Guidance Paper No. 505 "Record of personal documents"*.) Use of a safety deposit box is not recommended as its contents might be frozen at death. It is a wise precaution to retain a copy of your Will among your own papers, with a notation as to where the original is lodged.

*Can the marital laws of the Province of Quebec affect my Estate?*

Yes, if at the time of marriage the husband was domiciled in the Province of Quebec.

## \* \* \* FAMILY ALLOWANCES \* \* \*

*This paper cancels T.C.S./O.I.59-16 dated 7 May 59*

1. Officers with children under 16 years of age will be interested in the action they should take when in Canada on home leave and tour with respect to applying for family allowances and how their position with regard to income tax exemption might be affected thereby. It is to every officer's advantage to apply for family allowances each time his children under 16 come to Canada. (Matters dealing with family allowances and income tax returns are the responsibility of each individual officer. The following information is given without any responsibility on the part of this Department).

2. With respect to family allowances, provided the usual requirements are met, the mere fact of setting foot in Canada establishes the eligibility of an under-sixteen child of an Officer to receive family allowances. The under-sixteen child visiting Canada with its parents who are on home leave and/or tour is eligible to receive family allowances. From this it will be readily apparent that an Officer's child attending school in Canada while under 16 years of age is eligible to receive family allowances. Payments made for a child whose parents are not in Canada can only be made to a named individual in Canada who has custody of the child.

3. Application forms for family allowances are available at any Canadian post office and when completed should be mailed to the Regional Director of Family Allowances in the capital city of the province in which the child is residing. If there is any doubt as to the appropriate province, the application should be forwarded to the Family Allowances and Old Age Security Division, Department of National Health and Welfare, Ottawa.

4. With respect to income tax, the situation is very simple in that, with one exception, any child eligible to receive family allowances may be claimed as a \$500 deduction if not resident in Canada on the 31st December of the tax year. Whether or not the family allowances have been applied for and/or received is of no concern to the income tax authorities.

The one exception referred to is the case of an Officer returning to Canada with a child who has not previously been eligible for family allowances (e.g. born abroad). In this case, even though the child is resident in Canada on the 31st of December, the officer may elect either:

- (a) to claim the child as a \$500 exemption, in which case the family allowance payments for which the child has been eligible (whether received or not) must be added to the officer's income tax, or
- (b) to claim the child as a \$250 exemption.

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\* \* \*  
**COMPENSATION IN THE EVENT  
OF ACCIDENT WHILE ON DUTY**  
\* \* \*

1. Under the terms of the Government Employees' Compensation Act, compensation is available to Government employees and, in case of fatal injury, their dependents, to cover injuries sustained as a result of an accident occurring whilst an employee is on duty. If an accident, which does not result in death or serious disablement, is attributable to the serious or wilful misconduct of the employee, no compensation is payable. Neither the amount of any compensation, nor the conditions of its award, will be affected by the employee being in travel status at the time of the accident, provided such travel is on Government business. Travel status covers any absence from the office premises on duty.
2. It is within the discretion of the Department to grant F.S.O.'s and F.S.E.'s "injury leave" in which case there is no charge against the employee's leave credits. However, there is no authority to grant "injury leave" to locally-engaged staff.
3. When an accident occurs during a scheduled flight, the employee may claim compensation only under the Government Employees' Compensation Act. However, if an accident occurs during a non-scheduled flight, the employee may elect to claim compensation under either the Government Employees' Compensation Act or the Flying Accidents Compensation Order, whichever is the most advantageous. Rates of compensation for the former (as far as the Trade Commissioner Service is concerned) are those in effect for the Workmen's Compensation Act for Ontario. For the latter, it is the Pensions Act which determines the rate. Both rates are available in Ottawa.
4. With respect to F.S.O.'s and F.S.E.'s, accidents should be reported as soon as possible to the Department by the head of post. The report should be fully detailed and should include the extent of the injury and probable duration of absence. It should be accompanied by an authenticated report of the accident, witnesses' statements if available, and all other relevant documents including medical reports and accounts. The Department will be responsible for forwarding the claim to the Department of Labour.
5. Locally-engaged employees fall into two groups for accident compensation purposes:
  - (a) Employees who are protected by the law of the country of employment. This coverage is generally achieved by means of a payment by the employer to a state fund, out of which compensation is paid to employees and/or dependents of employees.
  - (b) Employees who are not entitled to any compensation under local laws.

With respect to the first group, accidents should be reported to the appropriate local authority for their action under the laws of the country concerned. With respect to the second group, however, compensation will be based on the Workmen's Compensation Act of Ontario. Particulars should be forwarded to Canada as per paragraph 4.



6. Local employees are eligible for full repayment for medical expenses resulting from an accident occurring during the performance of the employee's duties. Loss of salary from such an accident is covered:—

(a) by the employee's accumulated sick leave, and

(b) by a provision of the Act which allows for the payment of up to 75% of the wages lost by an employee after the expiry of sick leave credits. There is a ceiling of \$5,000.00 per annum on the rate of pay that will be considered.

7. Strictly speaking, once the beneficiary of an award under the Government Employees' Compensation Act has selected the doctor by whom he is to be treated, he may not change to another doctor or consult any specialists without the prior approval of the Workmen's Compensation Board. In practice, as far as Trade and Commerce personnel abroad are concerned, this may be interpreted to mean that a doctor may be changed only for very good reason. Advice of any change, together with a complete statement of the reason, should be forwarded to the Department as soon as possible.

8. Once an employee has elected to receive compensation under the Government Employees' Compensation Act (*or the Flying Accidents Compensation Order*), any other monies payable to the employee as a result of the accident become the property of the Canadian Government. Amounts in excess of the award made under the Act, may, with the approval of Treasury Board, be paid to the employee. For example, an employee who receives compensation for an accident in the amount of \$10,000. under the Act, but to whom the courts award damages in the amount of \$20,000. against a third party, might, with the approval of Treasury Board be paid the \$10,000. by which the court award exceeds the amount paid out in compensation by the government. The intent of this provision is to ensure that neither the injured employee nor the government makes a profit out of the accident.

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Original 3 January 61

## \* \* \* DIPLOMATIC CLAUSE IN LEASES \* \* \*

1. A diplomatic clause should be included in leases signed by departmental personnel abroad. In all cases the lease and the diplomatic clause should be discussed with a lawyer in the country concerned who can check on the suitability of the terminology of the clause in relation to the balance of the lease as well as ensure that the clause itself will have a clear legal effect in the lease and will not conflict with any local laws.

2. The following four sections are suggested in order to give the Department and the lessee maximum protection:

*"(1) Subject to sections (3) and (4), if the lessee shall be transferred and shall need to terminate this lease and vacate the premises pursuant to the terms of the transfer and shall give to the lessor notice in writing of such his need, then, upon the lessee vacating the premises and making payment to the lessor of"* (Note: insert one of the following alternatives)

**1st choice** *"the rental herein for the period, if any, between the date that the lessee vacates the premises pursuant to the transfer and the expiration of one calendar month from the date on which the said written notice to the lessor shall have been given,"* (Note: more favourable than 2nd choice and agreement to insert should be sought)

**2nd choice** *"one month's rental herein for the one calendar month immediately following the month when the lessee vacates the premises"* (Note: If the landlord will not agree to one month's extra rental and demands more time, officers should not go beyond three months' extra rental. This agreement to be inserted only on the insistence of a landlord.)

*"this present lease and all the covenants and provisos herein shall cease, determine and become void as if the lease had terminated by passage of time, but without prejudice to the rights and remedies which either party may have against the other in respect of any antecedent claim or breach of covenant."*

*"(2) Any notice in writing under this lease to the lessor shall be sufficiently served if delivered to him personally or sent to him by registered mail at his last known address or served on any agent authorized by him to receive or who has in fact on his behalf collected the rent of the demised property."* (Note: Agreement to include this paragraph should be sought.)

*"(3) If the lessor shall rent the premises to another lessee for any period during which rental is payable or has been paid pursuant to section (1) or (4), the rental herein for such period shall cease to be payable and if paid shall be refunded by the lessor to the lessee."* (Note: Agreement to insert this clause should be sought.)

**"(4) If, pursuant to the terms of the transfer, the lessee shall vacate the premises prior to twelve months after the commencement of the lease, he shall make payment to the lessor of the rental herein as provided by section (1) or, the balance of the rental payable for the first twelve months after the commencement of the lease, whichever sum is the larger." (Note: To be inserted only on the insistence of a landlord.)**

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*Original 3 January 61*

\*\*\* RECORD OF PERSONAL DOCUMENTS \*\*\*

This paper cancels I.S. 56-11 dated 1 February 56

1. The personnel division of the Department requests original birth or baptismal certificates, marriage, divorce and death certificates as appropriate from all employees. Two photostats of each are made, one of which is kept on file in the Department and the other sent to the Superannuation Branch. The original documents are then returned to the individual concerned.

2. The Trade Commissioner Service, in the event of an officer's death abroad, hopes to help his family in settling his estate. To facilitate this work, the Department maintains a record of personal documents which are vital to the settlement of an estate.

3. In his own interests then it is suggested that each Trade Commissioner send in the following information which would be useful in the event that the Department were called on for assistance by a Trade Commissioner's family. Any additional information could easily be incorporated in the existing records. The sheet on which this information is listed, as well as its containing envelope, should be marked "PERSONAL INFORMATION". Officers are expected to ensure that this information is kept up to date.

Date .....

Next of Kin

Name	Address (and Telephone)	Relationship
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Wife's Next of Kin

Name	Address (and Telephone)	Relationship
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Birth Certificates

Name	Place of Birth	Date of Birth	Place of Safekeeping
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Officer

Wife (maiden name)

Children

"  
"  
"  
"  
"

**Other Documents**

**Place of Safekeeping**

Marriage Certificate(s)  
Divorce Certificate(s)  
Will  
Duplicate of Will  
Certificate(s) of Guardianship

**Life Insurance Policies**

<b>Company</b>	<b>Policy Number</b>	<b>Place of Safekeeping</b>
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**Other Insurance Policies**

<b>Company</b>	<b>Policy Number</b>	<b>Type</b>	<b>Place of Safekeeping</b>
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**Bank Account(s)**

<b>Bank</b>	<b>Account Number</b>	<b>If joint, with whom</b>
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**Safety Deposit Boxes**

<b>Place</b>	<b>Box Number</b>	<b>Whereabouts of keys</b>
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**Fraternal Organizations, Societies, etc. which might help in case of need:**

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*Original 3 January 61*

## \* \* \* DIRECTOR'S RECORD \* \* \*

1. The "Director's Record" provides rapid access at head office to some of the factors which may affect an individual's posting and transfer. Although this record was initiated by departmental action, (T.C.S./O.I. 59-5 dated 4 February 59,) the responsibility for keeping the records current rests with the individual F.S.O. and F.S.E.

2. There is no need to advise the Department on those changes resulting from action initiated by the Department (e.g. promotion and transfer). Others, however, such as change in size of family or education of children, should be brought to the attention of the Director for inclusion in the "Director's Record". It would be well not to count on a letter which indicates a change in personal information being referred to the Director. When such a letter is written, simply provide an extra copy for the Director with "Director's Record Copy" marked on it.

3. Personal information can be forwarded in envelopes marked "To be Opened Only by the Director (or Assistant Director (PERSONNEL)), Trade Commissioner Service". Letters marked for the personal attention of officers **by name**, rather than title, may not be processed if he is absent.

**N.B.** Letters should not be marked "... and Confidential" because this is a security rating and the letter is opened at once by the security registry.

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*Original 3 January 61*

\*\*\* INSURANCE ON PRIVATE CARS \*\*\*

1. It is sometimes possible to obtain "fleet rates" on insurance for privately owned vehicles. In order to be eligible for this benefit, it is necessary for enough of the personnel in a mission to form a group which agrees to deal with one agent.

2. In making such an arrangement care must be exercised that the office is not identified as the insurer with the Trade Commissioner or other F.S.O. signing as its authorized representative. Any policy on privately-owned vehicles must be contracted for by the individuals concerned in their personal not official capacity.

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*Original 3 January 61*

\*\*\* RENTAL SECURITY DEPOSITS \*\*\*

1. Landlords may demand a security deposit of from 1 to 3 months rent before signing a rental contract. The principle behind this is that he is in a position to deduct from it, when the lease terminates, any expenses to repair damage caused by the tenant.
2. Responsibility for the deposit and its recovery is the Trade Commissioner's.
3. If the money has been paid to the landlord in cash, there may be an understandable reluctance on the part of the landlord to surrender the funds, which leads to an earnest effort to find enough damages to match the amount of the deposit. This is particularly possible when the lease has been of long duration.
4. In order to minimize the temptations to the landlord to exaggerate his claims upon termination of the lease, it is suggested that foreign service personnel get their local bank to hold the deposit in suspense for the duration of the lease. Most banks are prepared to do this for a modest fee and will not release the deposit in full or in part to either tenant or landlord without the written consent of both.

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*Original 3 January 61*



## \*\*\* DRIVING LICENCES \*\*\*

1. Residents of Ontario who are not in possession of a valid Ontario Driving Licence must, in order to drive a car in Ontario, undergo a test at a cost of \$1.00 which consists of (a) a written examination, (b) a sign test, (c) a driving test and (d) an eye test (cost included in the \$1.00 examination fee), and then pay \$2.00 for the licence itself. The examination centre advises that in the late spring or early summer there may be a delay of 4 to 5 weeks before an appointment can be arranged to hold the examination.
2. An expired licence cannot be used to obtain a new licence for any year other than the immediately succeeding year. After this the holder, in order to obtain a new licence, must pass the whole test as would a beginner. It would be useful to record the serial number of your current driving licence. Without this number the licence cannot be replaced in the event of loss.
3. In view of the foregoing, Trade and Commerce personnel stationed abroad who are in possession of a valid Ontario Driving Licence may wish to consider the alternative of renewing their permits every year. This can be done by filling in the "Application for Operator's Licence" section on the inside of the valid permit and mailing it, together with a cheque on a Canadian Bank for \$2.00 made out to the Ontario Department of Transport, to the Motor Vehicle Licence Branch, 294 Lisgar Street, Ottawa, Ontario. It is appropriate and advisable to show either the mission address or the private foreign address in the address section of the application. In order to avoid unnecessary correspondence, the Motor Vehicle Licence Branch suggests checking:
  - (a) That every question has been answered,
  - (b) That christian names are all spelled out in full,
  - (c) That the licence is signed both on the face and on the renewal,
  - (d) That, if glasses are worn, the defect that they correct is mentioned in the appropriate space on the left-hand side of the application.
4. An additional advantage to keeping a valid Ontario Driving Licence is that, en route to Canada, there may be occasions when it will allow the use of a rented or borrowed car in a country which does not recognize the validity of a permit issued in the country from which the individual has been posted or transferred.

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Original 3 January 61

\*\*\* INCOME TAX \*\*\*

1. Responsibility for the filing of annual Income Tax returns rests with the individual Civil Servant. Personnel abroad may be interested in the points made in connection with Income Tax in the following Guidance Papers:

Paper #	Title	Paragraph
405	Posting Procedure	43
500	Estate Taxes and Succession Duties	6
502	Family Allowances	4
801	Hospital and Medical Insurance	16 and 25

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Original 3 January 61

## \* \* \* AUTOMOBILES \* \* \*

1. For ready reference and without quoting any of the technical regulations involved, Trade Commissioners are provided with the following information which affects their use of private cars in Canada free of duties and taxes:

**(a) Bringing A Car Home From Abroad**

In order to qualify for entry into Canada free of duties and taxes a Trade Commissioner must have owned the vehicle for at least 6 months prior to the date on which the vehicle is cleared through the Canadian port of entry. By "owned" is meant "in the Trade Commissioner's actual personal possession".

Additionally, the Trade Commissioner must undertake not to sell the car until at least 1 year after it has been imported.

**(b) Ocean Freight On Cars Brought To Canada**

There is no authority under which the Department can pay ocean freight charges on a car being shipped to Canada.

**(c) Buying A Car In Canada To Take Abroad**

If a Trade Commissioner takes delivery in Canada of a car he is going to use abroad, the length of time he may use it in Canada is limited. For Trade Commissioners who are on temporary duty or leave in Canada between postings, the car may stay in Canada for 90 days. However, for Trade Commissioners who are being posted abroad after a tour of duty in Canada, and hence are classified as residents, the car may only be used for 30 days in Canada.

2. Responsibility for all arrangements concerning privately-owned automobiles rests with the individual Trade Commissioner

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Original 20 April 61

## \* \* \* STYLE OF WRITING \* \* \*

1. "Foreign Trade" does not ask or expect that the reports it publishes shall be written in a particular style or follow an established pattern. The style of writing will vary with the author, because it will reflect his personality, temperament and training. It will also vary with the subject; a report on business conditions will differ in style from one on the market for blueberries. Within limits "Foreign Trade" welcomes individuality, not conformity, in reports.

2. Report-writers should bear in mind that "Foreign Trade" is published for the Canadian businessman and must compete with other publications for his attention. He expects to find in it useful information presented clearly and concisely, because his time for reading is usually limited.

The following suggestions may help Trade Commissioners to prepare practical, readable reports.

**(a) Organization**

Always organize your material and draw up a rough plan before you begin to write. Some articles that "Foreign Trade" receives have obviously been dictated from rough notes and are loosely constructed and repetitive. An initial plan assures an orderly treatment of the subject, and a smooth transition from one phase of it to the next. The "Style Manual for Writers and Editors" to be published by the Queen's Printer, covers many aspects of writing and includes a useful chapter on "Organization and Prose Style". (A copy will be sent to each office).

**(b) Introduction**

The first paragraph in a report should attract and hold the reader's interest. It is best to begin with a simple, direct statement — "The Iranian economy is back on its feet, after twelve months of slow recovery" — not with a subordinate clause or a qualification. For variety, a report may begin with a case history or an incident that illustrates points made later on. The first, or failing that the second, paragraph should always give some idea of the subject and scope of the report.

**(c) Paragraphs**

Keep the paragraphs fairly short and begin a new one as you progress to a new topic. Remember that one paragraph should lead into another, without an abrupt transition. Sentences too should be short, with some longer ones mixed in to avoid a choppy effect.

**(d) Illustrations**

Use examples or case histories whenever you can to illustrate the statements that you make. (When you can draw upon your own experience, these illustrations are particularly effective). They result in a more graphic report. Sometimes it is useful to quote an agent, businessman or banker in the country from which you are writing.

**(e) Local Colour**

When you are reporting from a foreign post, try to work into your article something of the atmosphere there and some information on how business is carried on. A report on the market in Ghana, for example, might well make some mention of the "market mammies", the petty traders seen in local West African markets. Be careful about including a great deal of historical material or background information. It will overload your article and perhaps elbow out commercial information. In writing about coffee, for instance, remember that Canadian importers want details on production, prices, export prospects, etc., rather than a history of coffee-growing.

**(f) Canadian Usage**

"Foreign Trade" has been criticised for giving values in foreign currencies rather than in Canadian dollars, and for using foreign weights and measures. Whenever possible, convert values, weights, measures, etc., into their Canadian equivalents. Do not use expressions like "hire purchase" or "goods waggons" that are unfamiliar to Canadian readers. Use "billion" only in the Canadian sense of a "thousand million". In statistical tables, use periods only to indicate decimal points.

**(g) Personal touch**

Reports for "Foreign Trade" need not always be strictly impersonal. When an article contains material gathered by the author during a visit to the country covered, it is worthwhile to say so. It is sometimes useful to write in the first person — for example, in describing some development project that you have visited.

**(h) Conclusion**

The concluding paragraph of a report deserves as much attention as the opening one. Too often the reports we receive don't conclude — they just stop. Round out your article with a final paragraph that sums up the material presented, re-states the problem and the possible solution, or reaches some conclusion.

3. What are the most common shortcomings in the style of reports as opposed to the content? Five of them are listed below.

**(a) Excessive use of the passive voice.**

Sticking to the active voice and to transitive verbs as much as possible makes for lively writing even on difficult subjects. "The Economist" will provide plenty of examples. Civil servants are particularly prone to choose the passive. Strong, expressive verbs also make for good writing. Don't overwork the verb "to be".

**(b) Overworking of roundabout phrases.**

Examples are "reached a high level", "consideration should be given to the need for" — and the use of compound prepositions (in connection with, with regard to, in respect of, and so on).

**(c) Repetition of certain words or phrases:**

Some writers repeat words or phrases, good in themselves, over and over again in a report. Try to employ synonyms. Roget's "Thesaurus" will help.

**(d) Too frequent use of subordinate clauses.**

This makes for an involved style and, as one authority remarks, "after sorting out all the clauses and phrases and connecting words we are left wondering what the writer means".

**(e) Use of plural verbs with singular subjects and vice-versa**

This is largely carelessness; careful checking of a report after it is typed should eliminate this grammatical mistake.

4. The writer of reports for "Foreign Trade" is not expected to turn out literary productions. The acceptable style for our purposes is one that is grammatically correct, clear and concise. The Rt. Hon. Vincent Massey summed it up when he said: "Our language will be in peril until we can train the craftsmen who, objuring all uncertain sounds, fix their hearts and minds on the good writing that is rooted in clarity, in honesty, in simplicity": Trade Commissioners who feel they need further help with questions of style or grammar will find it in Sir Ernest Gowers' "The Complete Plain Words" and in "The Elements of Style" by Strunk and White.

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Original 3 January 61

## \* \* \* TENDERS \* \* \*

1. Where business is possible, Trade Commissioners should make every effort to obtain prior information on impending tenders and warn the Department in advance with as much detail as possible.

2. Time is essential. It is suggested that officers review their procedure for handling tender documents so as to ensure there is no avoidable delay in their despatch to Canada.

3. In examining a tender for its possible interest to Canadian firms the following criteria will be useful:

(a) Amount:

In the case of engineering contracts, as a general rule, amounts under \$1,000,000 are not generally of interest.

(b) Time:

Can a Canadian firm assemble all the necessary information within the time available?

(c) Preference:

Is there any admitted or tacit exclusion of dollar goods from the tender?

4. Once it has been determined that the subject of a call for Tenders might be of interest to Canadian firms, the available documents should be examined with a view to determining what extra information might be required by the recipient. The following check list will be useful:

(a) When specific products are called for, is there any need to describe those products further for the benefit of Canadian firms? (e.g. "red paint" varies widely according to the purpose for which it is used and its method of application).

(b) Must submission be made on original forms or will facsimiles be accepted?

(c) Are the instructions in the tender invitations clear as to how Canadian firms should route their submissions? (e.g. must a local agent be used).

(d) Where copies of tender invitations have been sent direct to individual Canadian firms, has advice to this effect been noted on the set going to the Department?

5. On those contracts where tender invitations have been sent to Canada, whether or not any Canadian bids were actually submitted, it would be helpful to Canadian industry to know the name of the successful applicant and the amount of his accepted bid.

\*\*\* BUSINESS CONFERENCES \*\*\*

*This paper cancels T.C.S./O.I. 59-38 dated 24 August 59*

1. The Department fully recognizes the value to Trade Commissioners of attending annual conferences, meetings of Chambers of Commerce etc. Regular attendance at such events provides an excellent opportunity to meet old business friends and make new ones. Where such meetings are purely local in character and the proceedings are unlikely to affect trade with Canada no detailed report should be made.

2. Trade Commissioners should merely advise the Department that they have been in attendance at a conference unless there is any recommendation that is of specific interest to Canada.

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*Original 3 January 61*



## \* \* \* ENGINEERING PROJECTS \* \* \*

*This paper cancels T.C.S./O.I. 58-37 dated 8 September 58*

1. The need for guidance relative to the promotion of opportunities abroad for consulting engineering and construction firms is evident. Many Trade Commissioners are increasingly receiving direct requests for assistance from Canadian engineering firms in the consulting engineering and construction fields. Firms new to export trade are making themselves known to our offices abroad. An increasing number of requests is being received for reports on overseas engineering projects. This situation has led to the development of the check-list hereunder, which has been arranged so that details can be readily published in Foreign Trade if it is so recommended by the Trade Commissioner.

2. The list is intended as a check for completeness and to serve as a reminder to obtain whatever information may be lacking when the project is first reported. It is not expected that a detailed report will need to be prepared in each instance as most of the information will be included in tender documents and other descriptive material obtained from the project originators. However, itemized reports will be useful whenever it is possible to prepare them.

**Check List of Information to be Supplied on Foreign Engineering Projects:**

It would be helpful to consider each project in the light of the following points:

- (a) Names and addresses of architects, engineers and owners.
- (b) Date tenders are due.
- (c) A brief description of the job.
- (d) Accurate location of job.
- (e) Estimated cost of job.
- (f) Whether tenders are open or invited. Open tenders are those open to any contractor who cares to obtain a set of plans and specifications and submit a bid. Generally all government projects are open tenders. Invited tenders are those where the owner or architect invites bids from certain reputable builders, who are well known to them, usually five to six. Where tenders are open there are no problems for Canadian builders other than straight price competition. Where tenders are invited an effort must be made to have a selection of Canadian firms included.
- (g) Details of financing arrangements.
- (h) A list of firms which have taken out plans and specifications or which are likely to be competing.
- (i) At some time after the due date for tenders, the prices bid by various firms should be reported so that Canadian industry can see whether the prices compare favourably.

## \* \* \* FOREIGN APPROVAL OF REPORTS \* \* \*

1. Reports for "Foreign Trade" should not be submitted, in toto, to local government officials for checking. The officials concerned might infer that any objections they might have to parts of it will be respected; the risk of this is particularly high where communist-dominated areas are concerned.

2. To obtain statistical information and technically accurate statements of facts which are to be incorporated in a report and, at the same time, protect the Trade Commissioner's office from any possible loss of prestige suffered because an official resents the fact that his observations were not taken into account when the report was published, Trade Commissioners should seek the necessary facts without providing foreign government officials with a complete draft of the report. This can be done either by making appropriate extracts from it or by sending the official concerned a series of specific questions, the answers to which will be embodied in the report.

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*Original 3 January 61*

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**COOPERATION WITH DEPARTMENT OF  
NATIONAL REVENUE**  
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1. *This paper cancels T.C.S./M.I. 862 dated 7 June 54.  
T.C.S./O.I. 55-24 dated 12 September 55.  
T.C.S./S.A. 56-36 dated 6 November 56.  
T.C.S./Act. 59-10 dated 16 March 59.  
T.C.S./O.I. 59-41 dated 16 September 59.*

There will be occasions when officers of both departments can exchange information of considerable value. Representatives of the Department of National Revenue now make a practice of calling on Trade Commissioners wherever practicable. Customs Attaches on tour follow a similar practice. Every effort is made to give the Trade Commissioner advance notice of such visits.

2. Among its many duties, the Customs and Excise Division of the Department of National Revenue has the continuing problem of developing information for customs valuation, information on fair market value at time and place of shipment and, generally speaking, information likely to be useful in problems related to dumping. We can be prepared to make a contribution to their work, at request, when it can be done without creating an awkward situation. Trade Commissioners must maintain and retain the confidence of their business communities. The Department of National Revenue does not expect us to place that confidence at hazard. The Customs Officer will fully appreciate this point of view, when it is explained to him, and will be quite prepared to carry forward his inquiries on his own. Customs Officers are trained in this specialized work and have had long and successful experience in its implementation. Needless to say, officers of the Department of National Revenue conduct their investigations solely under the authority of their own Deputy Minister.

3. The Customs Act requires that goods be valued, for duty purposes, at not less than the price they attract upon open sale, in the country of export for home consumption, to customers of the same trade status and buying in like quantity as the Canadian importer. Therefore, when like goods, to those imported, are sold in the country of export, the Department of National Revenue seeks pricing information in the foreign market. When goods imported are not like the goods sold in the foreign market, the law requires that the minimum valuation be cost of production plus the same gross profit as is earned on similar goods in the country of export. In such instances, National Revenue officers are required to obtain details as to costs of production of the goods imported and, also, of the similar goods sold in the country of export, plus selling prices of the similar goods. The selling prices must be qualified as set forth in this paragraph's opening sentence.

4. Trade Commissioners abroad can be of assistance to our Canadian customs investigators in many instances. They can supply general information on the market and sometimes specific knowledge of the goods; in situations where they would not be compromising their own positions, they could

provide introductions to the foreign firms. They can provide temporary office accommodation, interpreters and office services such as telephone and airmail facilities and stenographic assistance all of which can generally simplify the routine work of the customs officer. Under some circumstances, a Trade Commissioner may be able to explain to the local manufacturer how it is in his own best interest to provide costs of material, labour and factory overhead, so that the Canadian customs authorities may be enabled to work out accurately the correct value for duty purposes. In other words, foreign firms are given an opportunity to present their side of the case before a definite Customs valuation ruling is issued to apply on the goods entering Canada.

5. The Department of National Revenue, when seeking the assistance of Trade Commissioners will send any enquiries to the Executive Director, Trade Commissioner, Service, in Ottawa, in duplicate. One copy will then be forwarded to the Trade Commissioner with such comment as may be appropriate. Similarly the Trade Commissioners will reply to the Executive Director in duplicate and one copy of the reply will be sent on to the Department of National Revenue. All such correspondence will be classified as "Commercial Confidential".

6. By the same token, enquiries on value for customs purposes coming to Trade Commissioners from private firms or individuals in Canada should be dealt with by replying that any information or data that you might develop would not, in any case, meet the requirements of the Department of National Revenue. A suggested paragraph for inclusion in any such letter you may write is as follows:

"If the information you seek is for the verification of fair market value quotations for customs purposes, I must advise that determination of values for duty under the Customs and Tariff Acts is a complex and technical matter which involves more than mere current quotations. In these circumstances, you should take the matter up directly with the Department of National Revenue at Ottawa."

7. In the event that, because of special circumstances, you deem it advisable to supply such information as is readily available, you should route your letter through the Executive Director together with a note explaining the special circumstances. Extra copies of your letter should be provided for departmental records and the Department of National Revenue.

8. See also *Guidance Paper No. 705*, "Exports to Canada".

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\*\*\* CLEARANCE OF COMMERCIAL SAMPLES THROUGH CUSTOMS \*\*\*

*This paper cancels T.C.S. O.I. 56-8 dated 11 July 56*

1. Occasionally, Trade Commissioners are faced with the need to clear commercial samples through the local customs on behalf of a Canadian exporter or other person who, with or without advance permission, has consigned a parcel to him. Extreme care should be taken to ensure that such shipments are not cleared under diplomatic franchise. Once the true nature of the shipment has been made clear to the customs authorities, standard commercial clearance can be effected and all duties, taxes and any charges paid. They should later be collected from the firm or individual concerned.
2. There is a risk of serious embarrassment to the Trade Commissioner if diplomatic immunity is wittingly or unwittingly used to cover the import of commercial items.

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*Original 3 January 61*

## \*\*\* GIFTS FROM ABROAD \*\*\*

1. Under Tariff item 690a there is provision for the duty-free entry of casual donations sent by persons abroad to friends in Canada or brought into Canada personally by non-residents as gifts to friends and not being advertising matter, tobacco or alcoholic beverages, where the value thereof does not exceed \$10 in any one case. Where a number of gifts for one family are being forwarded to Canada in one package, duty free entry will be permitted provided the gifts contained in the package are individually wrapped and addressed to individual members of the family and are not valued at more than \$10 each.

2. Note that Trade Commissioners, who are considered by the Department of National Revenue as Residents, do not qualify for this exemption if they bring the gifts with them. When sending a gift parcel, it is well to remember that if the parcel is insured for more than \$10, the customs examiners will take this as evidence that entry under item 690a would not be appropriate.

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*Original 3 January 61*

## \* \* \* SETTLER'S EFFECTS \* \* \*

1. From time to time immigrants may consult a Trade Commissioner on the customs exemptions to which he will be entitled on entry into Canada. The pertinent section of the Customs Tariff Act is 705, which provides for duty-free import of all the immigrant's usual and reasonable personal property except that:

- (a) they must have been owned by the immigrant for 6 months (certain exceptions are made, such as where the immigrant is limited in the amount of capital he may bring with him)
- (b) they must not be for use in any manufacturing establishment (certain exceptions are made, such as for hand tools)
- (c) if an automobile is involved, its value in excess of \$2500 will be subject to duty
- (d) the importation of alcoholic spirits is prohibited.

2. Once these principles have been explained to the immigrant for his guidance, it should be suggested to him that he write to the Department of National Revenue if there is any doubt as to how the provisions of Section 705 will affect him. Only that department is competent to make a specific ruling.

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*Original 3 January 61*

\*\*\* CUSTOMS EXEMPTION FOR RETURNING CANADIANS \*\*\*

*This paper cancels T.C.S. O.I. 59-3 dated 27 January 59*

1. The full text of that section of the Canadian Customs Tariff Act which refers to exemptions for returning Canadians is quoted below. This information will be useful for Trade Commissioners who should know where they stand as well as for answering questions posed by visiting Canadians. Your particular attention is directed to the underlined parts.

<i>British Prefer- ential Tariff</i>	<i>Most Fovoured- Nation Tariff</i>	<i>General Tariff</i>
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703b (1) Goods valued at not more than one hundred dollars included in the baggage accompanying residents of Canada returning from abroad after an absence from Canada of not less than forty-eight hours and acquired by them for personal or house-hold use or as souvenirs or gifts, but not bought on commission or as an accommodation for other persons or for sale, under such regulations as the Minister may prescribe .....

*Free Free Free*

A resident of Canada shall not be entitled to the exemption herein granted within a period of four months from the date of the last exemption allowed, nor shall the exemption be allowed on alcoholic beverages in excess of one quart, or on tobacco in excess of fifty cigars, two hundred cigarettes and two pounds of manufactured tobacco.

(2) Effective on and after July 1, 1958, in addition to the exemption provided for in part (1) of this item, a resident of Canada returning from a point beyond the continental limits of North America after an absence from Canada of not less than fourteen days may elect to avail himself of the following special exemption:



Goods valued at not more than two hundred dollars (not including alcoholic beverages, cigars, cigarettes or manufactured tobacco), acquired in overseas countries by residents of Canada during an absence from Canada of not less than fourteen days and acquired by them for personal or household use or as souvenirs or gifts, but not bought on commission or as an accommodation for other persons or for sale, under such regulations as the Minister may prescribe .....

Free Free Free

All goods admitted under the foregoing special exemption shall be declared by the resident at the time of his return to Canada, and any person who has availed himself of the special exemption is not entitled to any further exemption under item 703b within a period of twelve months from the date the last special exemption was allowed.

Goods entitled to entry under this tariff item shall be exempt from imposts, notwithstanding the provisions of this Act or any other Act.

703c Goods (not including alcoholic beverages, cigars, cigarettes or manufactured tobacco) imported

- (1) by members of the Canadian Forces or by employees of the Canadian Government after an absence from Canada of not less than one year,
- (2) or by former residents of Canada returning to Canada to resume residence therein after having been residents of another country for a period of not less than one year,  
and acquired by them for personal or household use and actually

owned abroad by them for at least six months before their return to Canada, under such regulations as the Minister may prescribe ..... Goods entitled to entry under this tariff item shall be exempt from all imposts, notwithstanding the provisions of this Act or any other Act.

Free Free Free

Any goods imported under this tariff item which are sold or otherwise disposed of within twelve months after importation are subject to the duties and taxes otherwise prescribed.

2. Trade Commissioners returning to Canada may claim exemption under 703c (1), their wives and children under 703c (2). It should be borne in mind, however, that those claiming an exemption under 703c (2) lose the privilege of a simultaneous claim to exemption under 703c (1). With reference to the limitation on tobaccos mentioned in 703b (1), these are individual maximums which may not be exceeded. Motor cars will be brought in under 703c (1) but the Department of National Revenue warns that the car must have been physically in the Trade Commissioner's possession for 6 months in order to qualify.

## \*\*\* EXPORTS TO CANADA \*\*\*

1. Every Trade Commissioner will find it useful to make himself familiar with the Department of National Revenue's memorandum D43 which contains the laws and regulations concerning Canadian Customs requirements respecting goods exported to Canada.
2. Nevertheless any information that a Trade Commissioner gives out concerning Canadian tariff matters is unofficial. Care must be taken to ensure that the recipient of such information clearly understands that the Trade Commissioner provides it on a personal and non-committal basis. When a foreign exporter must have a firm ruling, his enquiry should only be acknowledged and the matter should be referred to the Department of National Revenue. Alternatively, it might be advisable to suggest that the foreign firm approach the Department of National Revenue direct.
3. Imports into Canada must be accompanied by the appropriate Canadian Custom's Invoice Form. There are two series of forms used. The "M" series is used when the goods have been sold prior to import into Canada. The "N" series is used when the goods have been forwarded to Canada on consignment without sale prior to shipment. Within each series, the form to be used depends on the country from which the goods are being shipped. Those countries whose products enter Canada under the "General" tariff use the "M" or "N" form. Those countries whose products enter Canada under the "Most-Favoured-Nation" tariff use the "M.A." or "N.A." form. Those whose products enter under the "British Preferential" tariff use the "M.B." or "N.B." form.
4. Only the signature of the exporter, or a member of the exporting firm, having a knowledge of the facts to be certified, is required on the forms in the "M" series. If the exporter, for his own purposes, desires certification of such an invoice, the Trade Commissioner may do so and make a charge of \$1.00.
5. The "N" series, however, must be attested. In British countries the declaration may be made before a collector of customs, justice of the peace, notary public or any official authorized to administer oaths and in other countries before a British or other consul, notary public or other official authorized to administer oaths. The term "other official" includes Canadian Government Trade Commissioners who may not charge a fee for this service.
6. Trade Commissioners must avoid becoming involved in giving an opinion on fair market value. The certificate of value on the Canadian Customs invoice form provides adequate explanation of what is required in the normal cases where the domestic marketing practices in the country of export are the same as the export marketing practices. If the exporter encounters difficulties in determining what value would be acceptable, under Canadian Customs law, as the fair market value, then he should be referred to the Department of National Revenue in Ottawa for a ruling. He should give precise details of the commodity, the type of transaction and the marketing practices involved. Any other course of action, and any attempt on the part of the Trade

Commissioner to give a general explanation, might very well be misleading and create difficulties and embarrassment for all concerned. The fair market value concept is a complex part of Canadian Customs law, and, in view of its direct bearing on Canadian dumping provisions, it is most important that authoritative guidance on this matter for exporters to Canada should be provided only by the Department of National Revenue.

7. Trade Commissioners should not endeavour to apply previous rulings to present cases.

8. See also *Guidance Paper No. 700* "Cooperation with Department of National Revenue".

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*Original 3 January 61*

## \* \* \* ANIMAL CONTAGIOUS DISEASES REGULATIONS \* \* \*

*This paper cancels T.C.S./O.I. 55-23 dated 6 September 55  
T.C.S./O.I. 56-10 dated 20 August 56*

1. This paper is designed to provide explanatory comment which will be of assistance to Trade Commissioners called upon to issue certificates required under the regulations concerned with the importation into Canada of various animal feeds specified in Section 183 of the 1959 edition of the Animal Contagious Diseases Regulations. The main purpose of Section 183 of the Regulations is to provide the maximum protection to Canada against the introduction of foot and mouth disease.

2. As far as Australia, New Zealand, Ireland and the United States are concerned, they are currently recognized as free from foot and mouth disease, hence sub-section 2 of Section 183 applies. The effect of this is that the shipment is admissible to Canada if accompanied by two documents:

(a) A sworn declaration of the shipper that the product was grown in such country, and had not been out of that country prior to shipment to Canada, and where second hand bags are used a further declaration that the bags originated in that country and had not been out of that country prior to shipment; *and*

(b) in the case of overseas shipment, a certificate by the master of the vessel on which the product was shipped that no cattle, sheep, goats, other ruminants, nor swine, except those accompanied by a permit from the Minister, were embarked for any purpose on board the vessel on which the shipment so certified was conveyed to Canada.

3. As far as England, Scotland and Wales are concerned, a suitably worded certificate issued by an authorized official in any of these three areas is acceptable to the Canadian authorities.

4. From all other countries, however, animal feeds as defined in Section 183 must be accompanied by a certificate issued by a Canadian or British official before they can be imported into Canada. Obviously, it is not possible or practical for the Trade Commissioner to carry out inspection of the shipment personally. When, therefore, a Trade Commissioner is asked to provide a certificate for a shipment of livestock feed to Canada, he should engage (*to be paid for by the exporter*) a reliable, independent superintendence company to make sure that the requirements of Section 183 are fulfilled. The Canadian Veterinary Director General has no interest in seeing whatever paper is issued by the superintendence company to clear the shipment. It is up to the Trade Commissioner to employ a superintendence company in whom he has sufficient confidence to be able to issue the required certificate himself based upon their report to him. An acceptable certificate would read:

" I hereby certify that satisfactory evidence has been presented to me to indicate that, in accordance with the requirement of Section 183 of the Animal Contagious Diseases Regulations,

the shipment of ..... (product) ..... via ..... (steamship) ..... leaving port of ..... on or about ..... consigned to ..... at ....., was sacked in new bags that were not previously used for any purpose at a mill, elevator or warehouse at the port of shipment, or at a central interior place where inspection was made, and that the bags were transferred from the place where the product was packed, by disinfected cars, trucks, barges or chutes, to the vessel transporting the shipment to Canada."

(In the above certificate the words "..... or at a central interior place where inspection was made ....." should be understood to modify the previous word "sacked", not the word "used").

5. In case a Trade Commissioner should be asked what kind of disinfection is required, the Veterinary Director General has indicated that the preferable way is disinfection by live steam. Where this is not practicable, however, a thorough scrubbing with a solution of hot water and 4% sodium carbonate (*washing soda*) will be effective. In addition to the foregoing, he has advised us that Section 183 does not apply to four classes of rice.

- (a) **White or Milled Rice:** Rice with the hull and all bran and other covering removed down to the bare white rice kernel; germ removed.
- (b) **Polished Rice:** White or Milled rice mechanically polished to a glaze with the aid of glucose and talc.
- (c) **Cracked or Broken Rice:** White or Milled rice broken during processing and screened out.
- (d) **Brewer's Rice:** White (*Milled*) or Cracked (*Broken*) rice reduced to 5/64th inch size.

6. It is emphasized that a heavy responsibility rests on the Trade Commissioner to be sure of his trust in the superintendence company on the basis of whose report he issues the certificate. The outbreak of foot and mouth disease in Saskatchewan in 1952 resulted in a tremendous cost to Canada domestically and in the loss or dislocation of export trade. The severe application of Section 183 of the Animal Contagious Diseases Regulations is designed to try to prevent a repeat of this. If there is no superintendence company in which the Trade Commissioner has confidence, no certificate should be issued but the circumstances should be reported to Ottawa for decision.

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Original 3 January 61

## ★ ★ ★ FOOD IMPORT AFFIDAVITS ★ ★ ★

1. Enforcement of the various regulations governing the preservation of standards of quality in food products imported into Canada is basically the responsibility of three Departments of the Canadian Government, i.e. National Health and Welfare, Fisheries and Agriculture. Only those imported food products which are the responsibility of the Department of Agriculture need be accompanied by an import affidavit.
2. The Food and Drug Directorate of the Department of National Health and Welfare administers the Food and Drugs Act and Regulations. Imported food products must meet the same standards of quality prescribed thereunder as similar products manufactured in Canada. All imported food products are subject to examination to ensure that they meet these requirements. Prospective exporters of food products to Canada are reminded that new general food labelling regulations were promulgated on January 1, 1960. They should be particularly aware of these new regulations and therefore it is advisable to submit copies of labels to the Food and Drug Directorate for review in advance of shipment. The Food and Drug Act and Regulations do not require than an official "pure Food certificate" from the authorities in the country of origin, accompany food products imported into Canada.
3. The Department of Fisheries, which administers the regulations of the Fish Inspection Act and the fisheries section of the Meat and Canned Foods Act, does not at the present time require that an import affidavit accompany shipments of imported fishery products. However, all imports of fishery products are subject to rigid inspection to ensure that they comply with the Department's standards of quality. Copies of labels to be used on fish and shellfish products should be referred to the Department of Fisheries for a ruling on their acceptability. This should be done in advance of shipment.
4. The Department of Agriculture administers regulations under the Meat Inspection Act, the Processed Fruit and Vegetable Regulations, the Canada Dairy Products Act, the Fruit, Vegetables and Honey Act and the Canada Agriculture Products Standards Act. Special forms must accompany the shipment to Canada of many of the products covered by these regulations. Reference to these forms, the conditions surrounding them and actual copies will be found in the appropriate copy of the Act or Regulation in the Trade Commissioner's office. If any of them are missing from the office library, replacement copies can be sent from Ottawa without delay.
5. The foregoing is provided to shed some light on a complicated subject. The interpretation of these Acts and Regulations is the sole responsibility of the Department responsible for their administration. Specific questions on actual cases will be referred promptly to the appropriate Department for a ruling.

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\*\*\* TAX EXEMPT COMMODITIES \*\*\*

1. The fact that Foreign Service Officers are generally able to buy tax-free liquor and cigarettes is fairly widely known. It is, therefore, understandable that Canadian visitors or even local nationals will, from time to time, approach Trade Commissioners with a request to be allowed to purchase their own requirements through the Trade Commissioner.
2. Officers must refuse all such requests to sell tax-exempt commodities to third parties

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*Original 20 April 61*



## \* \* \* HYGIENE \* \* \*

1. Personnel abroad must be particularly careful of their health. The purpose of this paper is to remind you of a few down to earth facts. "Corn", if you like, but likeable "corn".

**PERSONAL MANAGEMENT**

2. Some of us have less trouble than others in avoiding illness. There is no reason, however, why any of us should be careless nor why sensible precautionary measures should not be carried out as a matter of habit. These may well vary with the individual and circumstances, but there are a few.

3. **Cleanliness** in all its aspects—yourself, your clothes, your dwelling, your kitchen, your laundry—is your first protection against infection.

4. **Your food and drink**—Without pushing to extremes, it is well to make sure of its condition and that it is properly kept. Better a little continuous supervision than a lot of chronic stomach aches. Much progress has been made in recent years in the treatment of some of the more disconcerting internal conditions, for example amoebic dysentery, but, even with the best and most prompt treatment, it's still a disagreeable business. So watch the water and uncovered food.

5. It would obviously be a waste of time and energy to make sure your food is safe without being equally sure that the receptacles in which it is prepared and served are thoroughly clean. To achieve this will not always be easy. In many posts, domestic help don't believe in hot water, soap or proper drying of dishes and utensils. Nevertheless, don't forget that you and your family do not necessarily have the same built-in resistance the local population may have.

6. Your household servants should not only be encouraged but where necessary disciplined to see to their personal cleanliness.

7. Naturally, before any servants are hired, especially in C and D posts, a proper medical check up should be obtained. Even if it should cost you something from your own pocket, it is worthwhile insurance over a period.

8. **Snacks in the market**—Those exotic titbits in out-of-the-way places, the roadside barbecue, too much tropical fruit. You are hungry, they are tempting and the wise thing to do is to pass them up. It's pretty tiring to keep your children away from street vendors but it's often healthier.

9. **Know your doctor**—Finally, and not least importantly, don't wait until you are ill to find a doctor. On arrival at your post, enquire of your colleagues which doctor they recommend. Then make the effort to become acquainted with him. Consult him from time to time. Don't wait for a catastrophe to call him in. Where conditions warrant, see him for periodic check-ups.

## **MODERATION**

### **In Your Work:**

10. When moderation is mentioned in this context, it is not in the sense that it should be used as an excuse to do little!

11. What is meant is that it's a good idea to husband both your mental and physical efforts in such a way as to best accomplish the job to be done, and to keep happy.

12. Some like to get at a job, try out various ways of doing it, and then pick out the way which appears to be the most satisfactory one. In so doing, they may be able to release certain built-in energies they possess and so, at the same time, provide themselves with a needed outlet for these energies.

13. Others like to size up a job, think it out first, do a bit of research, figure out the angles, draw on recollections of past experiences with similar or related undertakings. Having done this, they will then decide on the way to tackle the job.

14. The methods and the means to do the work will vary. No general line need be laid down. It is for each individual to find his own line best adapted to produce the desired results.

15. Whatever the methods or the means, your work should be organized for the good, steady pull. There is a halfway speed somewhere between the tortoise and the hare which is likely to get you there.

16. This is not to say that crash programs are to be dodged when they are clearly necessary, but you will be better conditioned to undertake them if you are mentally and physically alert.

### **In Your Representational Activities:**

17. Moderation should be applied to other parts of the operation abroad: the extra-curricular activities. Representation is an important part of the work abroad; it must be done well or it loses a good deal of its value.

18. Functions often seem to come in waves. If these waves are long enough, and frequent enough, they will leave one stranded on the beach out of breath. Here again it is a matter of judgment. Attendance at all functions is not always necessary. Nor again, is it always necessary that the distaff side attend. Command performances there are, of course, but they would not be the majority.

19. While still on the subject of functions, a final note. At one time or another, the amount consumed may have been the criterion of a successful do. If it were ever true, it is not so to-day.

20. If you are constantly drawing on your reserve energy—and who hasn't done so from time to time—the odds are you'll be flat out of it in an emergency.

#### **In Your Sports Activities:**

21. To the man or woman abroad, climatic atmospheric conditions are often different from those he was brought up in. Some adaptation is often required before undertaking to the fullest a familiar sport which might have been so rewarding at home. Tennis at sea level in the tropics is a different thing from tennis in Vancouver. Golf in high altitudes is something else again from golf at The Royal Ottawa.

22. So enjoy yourself but don't beat yourself to death. Condition yourself gradually—you'll get more out of whatever sport you may take up.

#### **RECREATION**

23. To our way of thinking, recreation really is a form of occupation which will enable one to get away for a while from the preoccupations of the day, of the week, of the month and return to them with more zest and appetite. Call it purposeful escapism if you will.

24. Thus it is that a variety of forms of recreation are available: a good book, music, painting, a long walk, bird watching, a building project, gardening, golf, fishing, skating, skiing. There is no limit to these occupations. To the Foreign Service Officer and his family, who serve in many different lands, the opportunities are even more varied. Simply getting to know the land and the people can be relaxing recreation.

25. The main point is to choose some form of exercise, be it mental or physical, that appeals to the individual. To get the most out of it, it has to be enjoyed.

26. All this is not said to encourage over-exposure to such occupations: such exposure can only defeat the whole purpose of the exercise. Little good can come out of any recreation that lands the participant flat on his back. Each individual's capacity and physical condition must determine the amount of exercise likely to provide the most recreation.

#### **RELAXATION**

27. A top notch career Foreign Service Officer once said "When I lose my sense of humor on the job, I know I'm slipping". This was simply another way of saying that when he wasn't in control of a situation, subconsciously perhaps, he was worried. To him the symptoms of this worry were a temporary loss of his sense of humor.

28. There are many things in the career of a Foreign Service Officer that can get him wound up good and tight. Some of them are unavoidable and not too much can be done to prevent their occurrence. The best thing to do is to adjust to them as best one can. How many of those occurrences, in retrospect, take on much less importance than they originally appeared to hold.

29. There is no doubt, however, that a properly relaxed approach to any problem will be of considerable help in solving it. There is also no doubt that there are a good many ways of achieving this relaxed approach.

30. The fear of the unknown need not be a strong factor. Acquiring working knowledge as quickly as possible and familiarization with a particular environment is an obvious answer to this point.

31. Getting the work at hand organized and programed is also a great help in providing a more relaxed operational atmosphere. When, as frequently occurs, a crash program presents itself, organized work can mean the difference between taking such a program in stride or running into a crisis.

32. Sayings to illustrate a point have the same shortcomings as making comparisons—very seldom do either fully apply. Despite this reservation, we are tempted to submit the following: "Never do to-morrow what should be done to-day and leave for to-morrow what need not be done to-day!"

33. No set rules need necessarily apply to organization or programing. The main thing is to use a system—a way, if you prefer—which produces the best results under given conditions for you in particular.

34. Finally, making a habit of securing a good night's rest is probably as helpful as anything else in combating tension. Night owling is for the birds as a habit. Late to bed and late to rise, doesn't make anyone healthy or wise!

#### **READING MATTER**

35. This has obviously not been a technical paper. Recommended for your reading and consideration are the following:

- Health Hints for the Tropics, published by the American Society of Tropical Medicine and Hygiene.
- Essential Health Precautions for Tropical Travel, by Dr. E.L. Davey, Chief, Civil Service Health Division, Department of National Health and Welfare.
- Health Precautions for Canadians in India, Department of External Affairs.

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## \* \* \* HOSPITAL AND MEDICAL INSURANCE \* \* \*

1. It will be remembered by most officers that, up until 1959, hospital insurance as well as medical insurance coverage was offered under a variety of plans.
2. None of these plans, however, was specifically designed for the foreign service. Each was a mere extension of plans available in Ottawa.
3. On January 1, 1959, the Canadian Government (outside Canada) Hospital Plan was instituted as a result of the establishment in the Province of Ontario of the Ontario Hospital Plan supported by the Provincial as well as the Federal Government.
4. Other basic hospitalization plans were terminated at that time.
5. On July 1, 1960, the Group Surgical-Medical Insurance Plan for the Employees in the Public Service of Canada became effective.
6. This plan, to which the Government of Canada makes a substantial contribution, was designed to extend surgical and medical benefits not only to home based staff but to F.S.O.'s and F.S.E.'s abroad as well.
7. Supplementary hospital coverage (originally \$3.00 now \$3.75 per diem at no increase in premium), as of July 1, 1960, was available through the Blue Cross. As of the same date, supplementary hospital coverage (\$3.00 per diem) became available as well under the Group-Surgical Medical Insurance Plan for the employees in the Public Service of Canada.
8. These plans provided a more comprehensive coverage than any previously available and were extended as of right to the foreign service officer rather than as a privilege as had been the case with previous plans.
9. In view of the extensive changes there have been in the regulations governing hospital and medical insurance, Trade Commissioners will be interested in the following summary which reflects the Department's experience to date.

**HOSPITAL (OUTSIDE CANADA) PLAN**

10. Originally established to extend to the Foreign Service Officer abroad the equivalent coverage enjoyed by head office staff, the same principles of settlement were applied to claims submitted from abroad as to head office claims.
11. It soon became evident that it would not be possible to satisfy equitably a goodly number of overseas claims if these principles were strictly adhered to. In November of 1959, changes were introduced to improve

the application of the plan. As of January, 1961, the original regulations were abrogated and a new set of regulations instituted in an effort to further improve the plan.

12. The plan is continually under review in an effort to make its application more equitable and its benefits as broad as possible within the actuarial possibilities of the premium payments.

13. It should be remembered that our Hospital Plan is an insurance plan; it is not meant to provide in all cases complete coverage of hospital expenditures. It does, however, reduce the out-of-pocket expenditures to reasonable limits.

14. However, under the new regulations introduced in January, 1961, any F.S.O. or F.S.E. carrying both the Blue Cross and the Group Surgical-Medical Plan supplementary benefits may expect in almost all cases full payment of his hospital disbursements.

15. All hospital claims should be submitted under cover of the F.A. 4 claim form in quadruplicate. Wherever possible, the attending physician should submit a statement indicating the reasons for confinement. Hospital claims should be forwarded by F.S.O.'s and F.S.E.'s abroad to Head Office addressed to the Assistant Director (Personnel), Trade Commissioner Service, Attention: Officer In Charge Medical Claims, for submission to the Department of Finance for payment.

16. Those portions of hospital accounts reimbursed under the Hospital (Outside Canada) Plan may not be claimed as deductions for income tax purposes. Any portion not so reimbursed may be claimed as also any reimbursements made under the Blue Cross supplementary hospital benefits plan or under the optional hospital benefits coverage of the Group Surgical-Medical Plan.

#### **GROUP SURGICAL-MEDICAL INSURANCE PLAN FOR THE EMPLOYEES IN THE PUBLIC SERVICE OF CANADA**

17. Established in 1960 and in force since July 1 of that year, the Group Surgical-Medical Plan, from experience gained in the first six months of its operation, would appear to provide more extensive benefits at a somewhat reduced premium to the insured than previous plans. The reason for the lower premium is due to the fact that the Federal Government contributes fairly substantially to the payment of the premiums.

18. Here again, it is well to note that this insurance plan is not intended to provide complete payment of all medical expenditures, but rather to reduce medical care costs to the insured so as to avoid financial distress which could otherwise be caused by such costs.

19. Claims should be submitted on form 490 P.S.C. or form 1311 P.S.C. or both as appropriate, stocks of which should be in all our offices abroad.

20. Under cover of T.C.S./Info. 60-42 dated 28 October 60, Group Surgical-Medical Plan, was forwarded a booklet entitled: Your Surgical-Medical Insurance Plan, an explanation of the Group Surgical-Medical Insurance Plan for employees in the Public Service of Canada.

21. It is strongly recommended that reference be made to this booklet when submitting claims. Properly submitted claims are being processed with despatch. Our experience so far indicates that delays in processing, where they have occurred, have been caused by failure to submit claims as instructed.

22. Some claims have been submitted under cover of the wrong forms. At other times, the doctor's bills have indicated solely that they were for professional services without any indication as to the nature of these services. In some cases, it has been possible to provide this information from Head Office, but this is not always the case. Properly submitted claims are in everyone's interest.

23. One final note with respect to prescribed drugs, charges for which may be claimed under the Major Medical Benefits of the Plan: care should be taken to have it clearly shown that they are in fact prescribed drugs.

24. Surgical-Medical claims under cover of the appropriate forms should be forwarded by F.S.O.'s and F.S.E.'s abroad to Head Office addressed to the Assistant Director (Personnel), Trade Commissioner Service, Attention: Officer In Charge Medical Claims, for submission to the underwriters for payment.

25. Medical services and other expenses reimbursed under the Group Surgical-Medical Insurance Plan may be claimed as deductions for income tax purposes providing such services and expenses fall within those allowable deductions under the Income Tax Act and Regulations.

#### **SUPPLEMENTARY HOSPITAL BENEFITS**

26. These are provided to supplement, as the name implies, the basic hospital coverage provided by the Hospital (Outside Canada) Plan.

27. The regulations of the Hospital (Outside Canada) Plan presently in force are intended to provide the insured with payment of all charges that may be included under what is known in Ontario as the Standard Ward Level Care.

28. Briefly, this means all the services available at a hospital: bed and board, x-rays, drugs, laboratory to mention a few. Standard ward level care is not strictly meant to include semi-private or private accommodation.

29. Hence it is that two supplementary hospital benefits insurance plans are available: The Blue Cross and that afforded under the Optional Hospital Expense Benefit of the Group Surgical-Medical Plan. Either or both of these may be subscribed to.

30. The Blue Cross will provide up to \$3.75 per diem, the Hospital Expense Benefit of the Group Surgical-Medical Plan \$3.00 above the basic hospital benefits.

31. The Blue Cross do not have an identification certificate for their contract. The Group Surgical-Medical Identification certificate serves also as identification for supplementary hospital benefits where in force.

32. Where an F.S.O. or F.S.E. maintains a supplementary hospital benefits plan in effect, he should, on submitting a claim under cover of form F.A. 4, indicate in the appropriate space the plan or plans he is carrying.

33. After the basic hospital charges have been attended to under the Hospital (Outside Canada) Plan, the accounts are then referred, where necessary, to the supplementary hospital benefits underwriters for further settlements.

34. Conditions may vary with individual cases but it is not unwise to carry supplementary hospital benefits plans.

#### **APPLICATION OF GROUP SURGICAL-MEDICAL PLAN AND HOSPITAL PLANS BENEFITS IN CANADA**

35. When an F.S.O. or F.S.E. returns to Canada, Group Surgical-Medical and Hospital Plans benefits still apply.

##### **Group Surgical-Medical Plan**

36. There is no change in the submission or handling of claims under the Group Surgical-Medical Plan.

##### **Hospital Plans**

37. Should an F.S.O. or F.S.E. or dependent require hospitalization while in Canada, Head Office should be advised in advance. Steps are then taken by the Department for processing the hospital claim directly with the hospital concerned. As a result, the officer is not obliged to settle the hospital charges and then submit a claim.

38. Should no previous advice have been possible, the officer will settle his hospital bill on discharge and then submit claim in the usual manner.



**Monthly Premiums on Insurance Plans**

39. For quick reference, the following table sets out the various rates mentioned above.

**(a) Hospital Insurance**

	Single Applicant	Applicant With One Dependent	Applicant with More than One Dependent
Basic Hospital (Outside Canada) Insurance Plan (Standard Ward Level Care)	\$2.10	\$4.20	\$4.20
Blue Cross Supplementary	.55	1.10	1.10

**(b) Medical Insurance****Group Surgical-Medical  
Insurance Plan:**

Basic Benefits without Optional Hospital Benefits	1.35	3.65	4.35
Basic Benefits with Hospital Benefit of \$3.00 per day	1.75	4.70	5.82

\*\*\*

## \*\*\* MEDICAL EXAMINATIONS \*\*\*

1. It is a requirement of the foreign service that personnel and their dependents on posting, transfer between posts abroad, and on return to Canada, undergo a medical examination, chest x-ray and immunization against diseases prevalent in the country in which the new post is situated, and that a satisfactory medical certificate, approved by the Department of National Health and Welfare, be submitted to the Deputy Head of the Department concerned. On initial posting the examination will include psychological assessment as necessary to determine fitness for overseas service.

2. Medical examination will be provided at government expense and, wherever possible, will be performed by medical officers of the Departments of National Health and Welfare or Veterans Affairs. Where the services of these Departments are not available, such services may be provided by any qualified medical practitioner and the certificate of such practitioners will require approval by the Department of National Health and Welfare.

3. For personnel and their dependents returning to Canada from unhealthy posts additional hospital investigation may be required, in which case the Department of National Health and Welfare will authorize the payment of expenses by the Canadian Government.

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*Original 3 January 61*

## \*\*\* PERSONAL MEDICAL RECORD \*\*\*

*This paper cancels T.C.S. O.I. 57-16 dated 13 September 57*

1. Service in some countries abroad may entail, because of different standards of living, hygiene and sanitation, some risk to the health of F.S.O.'s, F.S.E.'s and their dependents. This risk should be recognized and minimized by careful attention to personal health (the subject of a separate guidance paper) and the maintenance of an accurate medical history record.
2. In order to compile the latter an arrangement has been made with the Department of National Health and Welfare whereby foreign service personnel may send direct to that Department a statement of illnesses to which they or their dependents have been subject while abroad. As an appendix to this paper is a suggested form (FOREIGN SERVICE MEDICAL REPORT FORM) for the presentation of pertinent information. Full size copies of this form are available on requisition.
3. It is emphasized that the submission of this information is voluntary. It is, however, recommended in the interests of protecting the health of foreign service personnel and their dependents. Note that the information is to be sent direct to the Chief, Civil Service Health Division, Department of National Health and Welfare. It is, of course, understood that any charge for completing these forms would be a personal responsibility.

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*Original 3 January 61*

**PERSONAL MEDICAL RECORD**

**FOREIGN SERVICE MEDICAL REPORT**

To be sent in Sealed envelope addressed to Chief, Civil Service Health Division, Department of National Health and Welfare, Ottawa, Canada

Name ..... Classification of Post .....

Post ..... Date .....

To be completed by the Trade Commissioner

Significant Periods of absence on sick leave:—

From: ..... To:..... Nature of illness: .....

.....

.....

Signed .....  
Trade Commissioner

To be completed by Attending Physician (*after serious illness or on transfer*)

	OFFICER	WIFE	CHILDREN
Has health been generally good while in ..... ?			
Is present state of health satisfactory?			

Please give details of any condition or illness which requires further treatment or examination.

Have you advised any treatment following departure from post? If so, please give details, e.g., continuance of antimalaria precautions, etc.

Are you aware of any other factors which should be known to the Civil Service Health Division?

Signed .....  
(Attending Physician)

Date .....

## \* \* \* EXPORTERS' DIRECTORY \* \* \*

1. Six "Kardex" cabinets in which to house the Exporters' Directory are now part of the basic equipment of most Trade Commissioners' offices. A seventh unit will soon be shipped to each port to cope with the expansion in the Directory as a result of The Export Trade Promotion Conference. The present Directory lists less than 4,500 firms, a figure substantially lower than the total of 6,048 pockets available in the 6 Kardex cabinets. Consequently there can be no complaints of insufficient space in the 6 Kardex cabinets. Perhaps deletions contained in the monthly revisions are not being pulled from the Directory.

2. The work of keeping the Exporters' Directory up to date can be simplified by arranging the history sheets to conform to the undermentioned space allocation.

(a) Leave three empty pockets at the front of each drawer.

(b) Leave four empty pockets at the back of each drawer.

(c) Leave one empty pocket after every four history sheets.

(d) In addition to the foregoing, leave:

(i) 20 empty pockets after each of the letters "C" and "S".

(ii) 15 empty pockets after each of the letters "A", "B", "M" and "P".

(iii) 10 empty pockets after each of the letters "D", "G", "R" and "W".

(iv) 5 empty pockets after each of the remaining letters.

3. If there are any mechanical difficulties with the Kardex equipment, a manufacturer's booklet is available from the Directories Section.

\* \* \*

*Original 3 January 61*

## \*\*\* LIBRARY SYSTEM \*\*\*

1. Here is a simple method by which reference material at posts abroad can be made readily accessible. The departmental librarian has stressed simplicity in order to avoid the need for a specialist to initiate and operate such a system. It will ensure that all books can be easily returned to the same spot after use and that all the books on one subject are together in one place.

2. The arrangement of a book collection (*as distinct from periodicals*), can usefully be done by using the Trade Commissioner Service File Index as the numerical base for subject classification with a three-letter code after the number to distinguish between different books on the same subject. This distinction might be geographical:—

Exhibitions in Canada	135	CAN
Exhibitions in Italy	135	ITY

3. If, because of the number of books on one subject, a further distinction is necessary, (*so that no two books have the same number*), this could be achieved by using the first three letters of the author's name. If a further breakdown is needed, because of authors with similar names, a number could be added:—

Exhibitions in Canada by D. B. Snodgraff	135 Sno.	CAN
Exhibitions in Canada by A. X. Snodgraff	135 Sno. 1	CAN
Exhibitions in Canada by B. V. Snodven	135 Sno. 2	CAN

4. If it becomes necessary to introduce a card system to cross index the books in the library, the numbering system suggested here can be used without change.

5. With respect to periodicals, (*material published regularly more than once a year*), they might best be handled by:—

(a) Clipping material from periodicals and placing it on the appropriate subject file in the office and,

(b) Discarding older ones as soon as a more recent issue arrives and; discarding cumulative monthlies, e.g. Trade of Canada, when the annual aggregate is on hand.

N.B. In some territories there are organizations which are pleased to receive magazines, as new issues arrive.

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## \*\*\* CORRESPONDENCE WITH THE DEPARTMENT \*\*\*

*This paper cancels T.C.S. O.I. 59-14 dated 2 April 59*

1. Confusion arises from time to time in the use of the word "CONFIDENTIAL" to classify letters. "CONFIDENTIAL" is a security classification with a precise official meaning:-

"Documents, information or material, the unauthorized disclosure of which, while not endangering to national security, would be prejudicial to the interests or prestige of the nation, any government activity or individual or would cause administrative embarrassment or difficulty or be of an advantage to a foreign nation".

2. From the foregoing it will be readily appreciated that the use of such phrases as "Personal and Confidential" to classify letters is inaccurate and confusing because it is a combination of two classifications. Similarly, in "Strictly Confidential", the first word is redundant.

3. When the contents of an official letter are such that its circulation be limited to those officers directly concerned in taking action on it, it should be enclosed in an envelope addressed to the responsible officer and marked "To be opened by addressee only". This envelope is then enclosed in an outer envelope marked with the full address.

4. It must be understood that any letter marked "Personal" or "Private" will be dealt with as a personal letter. Under no circumstances may the contents of personal letters be interpreted as an official instruction or request for official action. The effect of this is that any official action discussed in "Personal" or "Private" correspondence cannot be put into effect until formalized in official correspondence.

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*Original 3 January 61*

\*\*\* IMPORTER'S DIRECTORY \*\*\*

1. Trade Commissioners should exercise care to avoid the possibility of creating resentment among firms in their territories by suggesting that the return of the questionnaire is a preliminary requirement to the obtaining of information. Probably the best way of handling this problem is, in the final paragraph of the initial letter which replies to the firm's query, to invite their attention to the benefits to be derived from filling in and returning the questionnaire. This is as far as an office should go unless there are special circumstances which reflect doubt on the local firm's integrity.

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*Original 3 January 61*



## \* \* \* OPENING A NEW OFFICE \* \* \*

1. The majority of the problems attendant upon opening a new office are strictly local and must be solved on the spot by the application of common sense. Some, however, are standard ones which occur repeatedly. It is with respect to some of the problems in the latter group that suggestions are set out below in the hope that they may help the officer handling this responsibility.

**BEFORE ARRIVAL**

2. Establish if there is already an office of any other Canadian Government department in the city.
3. Establish if there is room for the Trade Commissioner's offices with the above.
4. Establish whether any other Government agencies (External Affairs, Citizenship and Immigration, Wheat Board), are planning to open a new office soon.
5. Establish in concert with the Director, Trade Commissioner Service, whether new office premises should allow for future expansion.
6. Check whether the Canadian Government has ever had an office in this city in the past and, if so, seek a post report from that time.
7. Find out what countries (selecting a few of those with whom we enjoy close relations) maintain a mission in the city. With permission from the Director, Trade Commissioner Service, write to the Trade Commissioner in each of these countries to see if he can obtain a copy of their post report, for Canadian use. In the case of the United States or the United Kingdom, it is quite possible that a copy of their post report might be available in Ottawa.
8. Establish any particular security problems to be expected by virtue of the work which the Trade Commissioner will be doing and resulting from Canada's relations with the country to which he is being posted.
9. Ensure that the office copy of Official Instructions will be available immediately upon arrival in the city.
10. Through the commodity officers, establish what Canadian companies are represented in the territories for which the Trade Commissioner will be responsible. If a tour is made before departure, a particular effort should be put forward to call on each of these firms. (The Canadian companies might well be prepared to write to their representatives in the city advising them of the forthcoming arrival of a Canadian Government Trade Commissioner to open a new office.)
11. Check on requisitions for furniture and fixtures, when they can be filled and when shipped from Canada. Check on possibilities and need for local purchase (e.g. because of service, etc.)
12. Arrange that the Supplies Branch ship a small quantity of basic office requisites (or include them in the Trade Commissioner's baggage) such as envelopes, carbon paper, airmail paper, stenographer's notebooks, memo pads, pencils, erasers, stapling machine, scotch tape, etc.

13. Consult the Assistant Director (Personnel) as to what Canada-based staff may be needed.
14. Obtain a copy of the letter of accreditation sent to the Government of the territories for which the Trade Commissioner will be responsible.
15. As a courtesy, call on the head of mission and the commercial representative in Canada of the country or countries to which the Trade Commissioner is being accredited. (These may be in Ottawa or in a city en route to the new post.)

#### AFTER ARRIVAL

16. As soon as possible after arrival, cable the Department advising time and date of arrival, whether the Trade Commissioner elects to be on expenses or allowances and the address to which letters should be sent. Home address and the telephone numbers of office and home should be forwarded by mail as soon as available.
17. If the Trade Commissioner's accreditation was arranged through the British diplomatic representative, a courtesy call on the Head of the United Kingdom mission should have priority. It may be that official calls are best arranged with the help of the United Kingdom mission.
18. Calls on the officials of the country's Commerce Department must be made immediately after arrival. A series of courtesy calls based upon suggestions which may have been made by the Head of the United Kingdom mission will be in order.
19. Register "Canadian" as the cable address or, if this is not possible, register "Cantracom".
20. Rent a post office box if this is in accord with local practice. Cable the number to the Department.
21. Offices must be found; perhaps it is practical to maintain temporary offices in the hotel. (The first action which should be taken each time the office address is changed is to advise the Department by cable of the new address and telephone number.)
22. In examining office premises, use the following table worked out by the Civil Service Commission to represent "desirable space". The figures should be regarded rather as maximums, not minimums:

Trade Commissioner .....	up to 300 sq. ft.
Assist. Trade Commissioner .....	up to 250 sq. ft.
Commercial Assistant .....	up to 150 sq. ft.
Clerks and Stenographers .....	up to 100 sq. ft. per person
Messenger .....	up to 100 sq. ft.
Reception Room (in detached post)	up to 175 sq. ft.
Storage and files .....	up to 150 sq. ft.
Corridors .....	up to 150 sq. ft.

23. The search for permanent office accommodation may be a long one. As soon as several possible premises have been located, a full report on each should be sent to the Department including information on rent, how paid, location of the office in terms of the type of district, a map of the city with the location of each proposed office marked on it, a photograph of the building in which an office is located and a list of any particular difficulties there will be in maintaining security. (see also item 28).

24. Sections 8-35 and 8-36 of Official Instructions provide instruction on the procedure to follow in connection with leases. It is necessary to retain a reputable lawyer and discuss with him every phase of the negotiations for premises in order to give the Department maximum protection. Particular attention is invited to that section of the Official Instructions which specifies that leases may not be signed without the prior approval of Treasury Board. When the lease has been signed, one copy of the lease must be returned to Ottawa for filing.

25. Once the premises have been selected, a list should be sent to Ottawa of any furniture and fixtures that will be required additional to what was ordered before departure. This should be accompanied by recommendations as to what items could be purchased locally.

26. Clerical staff required can be hired on an emergency basis. The Trade Commissioner's attention is directed to Section L-7-23 of Official Instructions. Once the office has settled down, an establishment will be set up by the Trade Commissioner Service.

27. A list of local newspapers and periodicals which are necessary for the office should be submitted to Ottawa for approval.

28. Two photographs of each office, clearly marked with the function of the office or the title of its incumbent, should be forwarded to Ottawa as soon as installation is complete.

29. An inventory should be prepared and submitted to the Department.

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Original 3 January 61

## \* \* \* USE OF ADMINISTRATIVE STAFF AT POSTS ABROAD \* \* \*

*This paper cancels T.C.S. O.I. 57-29 dated 15 November 57*

1. There is an annual review of establishments at posts abroad which is carried out jointly by this Department and the Department of External Affairs. During this review, establishment positions are allocated to either Trade and Commerce or External Affairs on the basis of which one makes the greatest use of the employee in question. It is not the intention however, that such allocation of positions should result in the employee's services being restricted to one department.
2. Trade Commissioners, in close cooperation with their colleagues in the Department of External Affairs, should work out that distribution of the mission's work-load which results in the most economic and efficient use of personnel on the establishment. There will be times when Trade and Commerce personnel, both Canada-based and locally employed, will be able to take on some work for which External Affairs is responsible and vice versa.
3. An example of this kind of thing is the receptionist/telephonist, who is usually carried on the External establishment. She may be given translation work, typing and the handling of invitations as an added responsibility. There is, however, no reason to restrict her to External Affairs' work simply because she is on their establishment. If it makes for a more sensible distribution of the work for her to keep the Exporters' Directory up to date, then the Trade Commissioner and his External colleagues should have no hesitation in assigning this work to her. No direction on how work can be distributed is practical from Ottawa. Efficient use of Personnel will depend upon the good relations and common sense cooperation between the officers of both departments.

\* \* \*

*Original 3 January 61*

## \* \* \* TOURS \* \* \*

1. Trade Commissioners may find it useful, when on tour, to have their itineraries, background notes, records of interviews, and records of expenditures centralized in a loose-leaf book. As well as simplifying the day-to-day conduct of the tour, the tour book should be designed to enable facts to be assembled along the way in an organized fashion for typing and to provide essential information at a glance to answer questions raised during interviews.
2. While the following check list refers to a tour of Canada, the idea applies equally well to a tour of territory. A standard loose-leaf binder can be set up as a tour book. To facilitate preparation of tour books for subsequent tours from the post, several copies of the original book can be made and copies kept available for the future. Section dividers and tabs can be used to identify headings such as the following:

**Trade Statistics:**

3. The following information should be kept as brief as possible so as to facilitate quick reference:
  - (a) Trade between Canada and Territory(ies)—in total, and in important specific commodities.
  - (b) Trade regulations in the territory—customs, licensing, quarantine, etc.—any regulations the Trade Commissioner might be asked to explain.
  - (c) Canadian investment in the territory—if this is significant.

Separate subjects should be kept on separate pages and statistics set out so they can be amended for subsequent tours.

**Government and Trade Organizations:**

4. It may be helpful in some cases to include the individual title:
  - (a) Personnel in key government departments, marketing boards, Chambers of Commerce, and trade associations.
  - (b) Important banks.
  - (c) Shipping lines and agents.
  - (d) Customs brokers and forwarders.
  - (e) Publishers and advertising agencies.

**Commodity Information:**

5. This can include the principal commodities which the Trade Commissioner should know about. Headings for the major commodities can be listed one to a page, with the following information for each:
  - (a) Total imports (exports) and Canada's share.
  - (b) Value of imports from (exports to) other important countries.
  - (c) Pertinent trade regulations—tariffs, licensing, quarantine restrictions, etc.
  - (d) Most important importers (exporters), together with their Canadian principals or details of the Canadian connections they desire.

**Tour Notes:**

6. For a full tour of Canada, sections can be set up with dividers and tabs for each region—e.g. British Columbia, Prairies, South-Western Ontario, Toronto and district, Montreal and district, Atlantic Provinces, etc. Within each regional section the firms the Trade Commissioner plans to visit can be set out, two to a page, in alphabetical order, prior to departure, with the following accompanying information:

- (a) Complete name, address, and telephone number of firm.
- (b) Officer to be seen (if known) and his title.
- (c) Products to be discussed.
- (d) Brief note on firm's local problems to provide cue for discussions. Briefing cues can be compiled readily from Head Office correspondence index.
- (e) At the beginning of each regional section recent important business visitors to the territory from that region can be noted plus any personal calls the Trade Commissioner wishes to make.

7. Because time between individual interviews is often limited, blank pages should be inserted opposite pages on which interviews are to be finally recorded. These can be used for jotting down, in rough, facts and figures which are later to be the basis of the report. When time allows, final notes are compiled in the appropriate space on each adjoining half page, sections not to appear in final notes can be circled. The tour book can then be handed to a typist without further re-arranging or detailed explanation.

8. In compiling individual tour notes, if a separate paragraph is started for each commodity discussed it will facilitate clipping and filing.

**Accounts**

9. A few ruled pages will suffice for on-the-spot recording of tour expenditures, while a large envelope mounted in the back of the tour book is a handy place to keep vouchers.

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*Original 3 January 61*

## \* \* \* CANADIAN TRADE INDEX \* \* \*

1. The Canadian Manufacturers' Association has found from experience that parcel post is more economical than freight for shipping the Canadian Trade Index. Trade Commissioners should therefore request that the Trade Index be shipped by freight only if parcel post causes inconvenience for reception by customs and subsequent release in their territories.

2. The annual requisition for the Canadian Trade Index for each post should specify the number of regular, Spanish or Portuguese copies required and should be forwarded directly to the Canadian Manufacturers' Association. It should be accompanied, where applicable, by:

(a) Detailed mailing lists prepared on good grade bond paper in such a way that they can be clipped and used as a label for the individual packages, *and*

(b) The required number of compliment slips (*plus a few spares*) for inclusion with copies distributed in accordance with mailing lists.

3. In order to permit good coverage and at the same time keep the number of copies at the useful minimum, Trade Commissioners should plan the distribution of the Trade Index along the following suggested lines:

(a) Courtesy copies and others that should be sent each year - 20%

(b) Copies for active firms every second year - 60%

(c) Copies for less active firms every third year - 10%

(d) Reserve for new contacts. (*to be mailed to the Trade Commissioner*) - 10%.

4. It is evident that mailing lists of the Trade Index will have to be kept in such a way that year to year comparison is easy. Probably an alphabetical card index might be the answer with the color of the card denoting the frequency with which the Trade Index should be sent to that particular person or firm.

\* \* \*

Original 3 January 61

\*\*\* SECURITY \*\*\*

1. If this subject were discussed in Official Instructions then the book would have to be classified and would thus be less readily accessible. For guidance Trade Commissioners should look to existing classified circular letters and to instructions by the Department of External Affairs.

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*Original 3 January 61*



## \* \* \* TYPEWRITERS \* \* \*

1. It may be of assistance to Trade Commissioners to understand the procedure in Ottawa which must be followed before the replacement of a typewriter in an office abroad can be approved.

2. The most important point to understand is that the Department has no authority to approve the replacement of any typewriters. Authority is granted or refused by the Canadian Government Printing Bureau on the basis of the case made by the Office Services Division of the Department.

3. The Office Services Division, in turn, can only base their case on the facts presented by the Trade Commissioner who wants his typewriter replaced. The simple statement "This machine is worn out and needs replacement" will not suffice. In the interests of ensuring that the best and most prompt service can be given to requests of this nature from Trade Commissioners and avoiding a good deal of correspondence, attention is invited to the following check list of points about the troublesome machine:

- (a) Date and place of purchase
- (b) Two estimates of repair (or difficulties of repair) from reliable agencies
- (c) The cost of a new 15 in. carriage machine (quoted in Canadian dollars)
- (d) The amount that would be allowed as trade-in value on the old machine
- (e) A general description of service facilities for office machinery at the post
- (f) A clear statement as to any special effect the local climate may have on office machinery
- (g) Total cost of repairs so far made to machine in question
- (h) Annual cost of any maintenance contracts
- (i) Total number of typewriters on inventory of post
- (j) A generous sample of typing of machine in question

\* \* \*

*Original 3 January 61*

\*\*\* CLASSIFIED CIRCULAR LETTERS \*\*\*

1. From time to time it is necessary to send out circular letters containing classified information. Such material cannot be incorporated in either "Official Instructions" or the "Guidance Manual" which are themselves unclassified and for maximum utility must remain so.

2. As in the past, two copies of such circulars will be sent to each post; one for the appropriate subject file and one for the classified circular letter file. It is expected that every post maintains a classified circular letter file for easy access to circulars by date or number rather than by subject.

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*Original 3 January 61*

\*\*\* TRADE FAIRS \*\*\*

1. Those Trade Commissioners who are faced with the responsibility of organizing Canadian participation in a Trade Fair, will find the appendix on trade fair organization useful. It has been printed on canary yellow paper in order to distinguish it from the individual Guidance Papers which constitute the Guidance Manual.

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*Original 3 January 61*

## \* \* \* VISITS OF MISSIONS FROM CANADA \* \* \*

1. The following may be a useful check list of points to consider whenever organizing the visit of a mission from Canada to a Trade Commissioner's territory:

**PRIOR TO ARRIVAL**

2. In concert with responsible officer in Ottawa, determine what expenses will be borne by members of the mission, how the expenses are to be divided and how the money is to be collected.
3. Make arrangements to keep the Secretary of the mission in Ottawa regularly informed of all developments. Sending him copies of pertinent memoranda and letters can achieve this.
4. Ensure that the Department has an up-to-date brief on the country, exchange regulations, etc. for members of the mission.
5. Advise Ambassador and colleagues of proposed itinerary.
6. Draw up tentative program, discuss with Ambassador and then make calls to check with organizations involved.
7. Consult with local authorities:
  - (a) Foreign office;
  - (b) Ministries likely to be involved;
  - (c) Customs authorities;
  - (d) Immigration authorities;
  - (e) Airport officials;
  - (f) Trade associations.
8. Draw up final draft program, including notes on transportation requirements, and forward to the Department. Also, send copies to other Trade Commissioners involved in itinerary.
9. Draw up invitation lists for functions on program.
10. Make tentative arrangements for any receptions including invitations, catering, etc.,
11. Advise Trade Publicity Branch of lead time necessary to ensure arrival of brochures on time.
12. Draft publicity program and alert persons concerned. Consider the possibility of some or all of the following:
  - (a) Coverage of arrival at airport (use airline publicity agent);

- (b) Press conference;
  - (c) Distribution of brochures, etc.;
  - (d) Photographs on arrival and during tour.
13. Set up accounting procedure for any expenses to be paid by or through the office.
  14. Arrange for local transportation:
    - (a) Schedule for embassy cars;
    - (b) Schedule for hired cars.
  15. Make hotel reservations:

Single occupancy for each if possible; perhaps parlour for private meetings.
  16. Prepare to brief the mission; prepare any speeches.
  17. Obtain passport numbers from Ottawa if necessary for quick clearance of immigration.
  18. Prepare room for group meetings.
  19. Send out invitations. (If R.S.V.P.'s are to be handled by telephone, the routine can be simplified by numbering the invitation list and putting corresponding numbers on the invitation cards.)
  20. Arrange for arrival at airport. Experience has shown that it is most helpful to have a member of the Trade Commissioner's staff come to the airport to take over complete responsibility for clearing the baggage through customs and taking it to the hotel.

#### **ON ARRIVAL**

21. Prepare simple local directory including embassy and residential addresses and 'phone numbers, banks, restaurants nearby; a doctor may be useful.
22. Arrange with hotel, if possible, for advance assignment of rooms. (avoids delay in line-up at hotel.)
23. Ensure that local currency will be on hand.
24. Arrange early delivery of programs and other printed matter to the mission.

25. Have a briefing period prior to Press Conference.

26. Be prepared to finalize any arrangements for further tickets, visas, etc..

**ON DEPARTURE**

27. Ensure that all arrangements are in order: tickets, exit documents, transportation to terminal; alert local officials.

28. Write up report.

29. Send members data they requested and any heavy documents they left behind.

30. Return dollars for any local currency left by members at post.

31. Do follow up with regard to potential business.

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*Original 3 January 61*

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**TRADE FAIR**  
**PARTICIPATION**  
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\* \* \*      **TRADE FAIR**      \* \* \*  
**PARTICIPATION**

**PREFATORY NOTE**

1. Although a few participations arise fortuitously from special invitations or new circumstances, most trade fair participations come about in two ways:
  - those recommended by various branches of the Department of Trade and Commerce for trade promotional reasons. Such recommendations, which are subject to consideration and endorsement by the Departmental Committee on Trade Fairs Abroad, lead to the Department's trade fair program proper;
  - those recommended by the Department of External Affairs to meet a political, cultural or informational objective. Such recommendations are considered by the two departments because, if endorsed, the services of the Exhibition Commission are required, the commodity branches will be involved in procuring product content and the Trade Commissioner Service may have to assist in manning the exhibit if trade enquiries are to be handled professionally. However, these participations by External Affairs are not technically part of the Department of Trade and Commerce trade fair program.
2. This paper primarily relates to participations which stem from the Department of Trade and Commerce trade fair program and are therefore implemented for trade promotional purposes.

**INTRODUCTION**

3. The Department's trade fair program is an important vehicle for the promotion of Canadian exports. As evidence of the success achieved by participating firms becomes more widely known, an increasing number of Canadian firms are supporting the Government's program.
4. This paper provides guidance in coping with the manifold problems which present themselves. The guidance is based on the experience of those, both in the field and at head office, who have taken an active part in the organization of trade fair exhibits.
5. Nothing in this paper should be interpreted as authority for incurring any expenses. Where suggestions are made on projects or publicity which involve the spending of money, the Trade Commissioner who wishes to adopt them must seek authority through the proper channels. He must support his request for funds with detailed information on how the expenditure will benefit the trade fair participation with which he is concerned.

## TRADE PROMOTION THROUGH TRADE FAIRS

### THE USE OF TRADE FAIRS

6. The main emphasis of any exhibit abroad organized by the Department is on direct trade promotion; we are trying to sell goods. Trade fairs attract buyers and traders who are interested in considering offerings in their particular merchandise fields. Our exhibits at these fairs; therefore, enable us to display Canadian goods and services to a concentrated and discriminating audience. We may be trying to promote goods not previously sold in a market or we may be attempting to broaden the market coverage of established lines.
7. There are many related benefits: determining product suitability and what changes may be necessary to make the products more acceptable to local tastes; doing market surveys, thus taking advantage of the presence of both buyers and products at a fair; directing attention to Canadian industrial developments or to agents of Canadian suppliers; promoting cooperation among local businessmen interested in trade with Canada and encouraging their closer association with the Trade Commissioner; enhancing Canada's reputation as a supplier of quality goods.

### ADMINISTRATION

8. All major recommendations concerning policy and participation in trade fairs are made by the Department's Committee on Trade Fairs Abroad. The Committee comprises representatives of each branch concerned with export trade promotion; the chairman is traditionally the Director of the Trade Publicity Branch. The Trade Fairs Abroad Division, a part of this Branch, acts as the Committee's executive arm. Each individual exhibit is organized by a working committee under the chairmanship of the Chief of the Trade Fairs Abroad Division, through whom it is responsible to the senior committee.
9. The scope of the Division's work is broad. In addition to coping with administration connected with the meetings of the Trade Fairs Abroad Committee and the various working committees, it is generally responsible for the formulation, development and coordination of the annual trade fair program and to see that its execution is in accordance with the intentions of the Trade Fairs Abroad Committee. "Development" includes the generation of new ideas and the means of making the Department's trade fair activities known to Canadian businessmen. The Division will collate the views of the trade promotion branches on market potentials and trade development possibilities abroad and the corresponding utility of various forms of exhibits and displays. The Division's activities involve correspondence with posts abroad on trade fair matters of a non-technical nature, supervision of coordination schedules, chairmanship of working committees and collection and utilization of participation reports.

10. The Canadian Government Exhibition Commission is responsible for the administrative, financial and technical aspects of each participation. This includes the selection of suitable sites, close liaison with the Trade Fairs Abroad Division and coordinators, contacts with Canadian companies concerning the physical nature of and the best promotional methods for their products, development of supporting activities, the general format of the exhibit, its design, fabrication, shipping, erection, maintenance, dismantling and disposition.
11. The Trade Publicity Branch is responsible for publicity and advertising, for the preparation of special literature and press releases for each project.

## TRADE FAIR PROGRAMING

### DEVELOPING THE PROGRAM

#### Decision to Participate

12. Proposals to participate in trade fairs may be the result of invitations from foreign governments or trade fair organizers, of recommendations from other Canadian Government departments or of recommendations arising within our own Department. Acceptance of any such proposals, when considered and favored by our Departmental Committee on Trade Fairs Abroad, is subject to approval by the Minister.
13. The Trade Fairs Abroad Division consolidates all departmental recommendations into a report for consideration by the Departmental Committee on Trade Fairs Abroad. This report records the opinions of the Heads of Post concerned as well as of the various branches of the Department. Recommendations for participation are made in the light of market priorities and manpower resources. Finally, when a program of exhibits is recommended, the objective of each is clearly established for the guidance of working committees. At the same time, decisions are made about such things as cost-sharing and extra manning.
14. In order to facilitate budgeting, the Committee makes plans for an 18-month period, agreeing on definite proposals for the next calendar year, and making tentative recommendations for the first half of the succeeding year. For large or complex projects, the Committee may make recommendations as far as 30 months ahead. This system does not preclude the approval of participation in a fair on an urgent basis, provided sufficient money is or can be made available.

#### Exhibit Content

15. The Committee has a general responsibility for recommending the general product content of an exhibit and any special supplementary background material as well as the form of the stand. In making such

recommendations consideration is given to surveys of market possibilities by the Trade Commissioner, to the Commodity Officer's suggestions based on his knowledge of industry and to existing import restrictions and currency problems.

## TYPES OF FAIRS

### General Trade Fair

16. A general (horizontal) trade fair is one in which a broad range of goods or services is displayed before the general public, usually grouped in a number of classes. A good many such fairs allow national exhibit areas or pavilions in which a country may organize its own general display. Sometimes the organizers may invite token participation by a country without charge, which may take the form of an information office in which the Trade Commissioner is available to visiting businessmen. (The primary interest of the fair's organizers in encouraging such free participation is the advance prestige of being able to list various countries as participants.)

### Specialized Trade Show

17. Specialized (vertical) trade shows are those devoted to one particular class of goods or segment of industry. The general public is usually excluded during all or much of the show and the fair may last only a few days. The show may have developed as an adjunct of a convention, conference, or seminar which assures an interested and specialized audience.

### Solo Show

18. There are many countries in which trade fairs suitable for trade promotion do not exist. In such an area, a solo fair completely organized by Canada may be presented. There are as many varieties of the solo fair as there are advantages to it: solo fairs range from the large fair such as we staged in the West Indies early in 1959 to the modest fur salons presented in several European cities in recent years. A "Canada Week" in a department store, travelling displays, a single window display, a private show in an automobile showroom, are all species of the same genus. Solo shows, when properly organized, have the main advantage of making a distinct Canadian impact whether on a whole city or on a small group of buyers—attention is not diverted by the competition. They also allow the Trade Commissioner to add his personal touch—he can be on the scene constantly and prominently, meeting businessmen in the environment of a "sample room".

## PARTICIPATION OF FIRMS

### Selection Of Exhibitors

19. The prime objective of our participation in a trade fair is the sale of Canadian goods: it follows, therefore, that the goods we display must be manufactured or produced by Canadian firms which can be relied upon to follow up every worthwhile opportunity. The immediate responsibility for persuading firms to participate in exhibits lies with the Commodity Officer. The Trade Commissioner, by virtue of his knowledge of local conditions and correspondence exchanged with Canadian firms, is often in a position to advise the Commodity Officer of companies which may be interested in a particular market. The Commodity Officer will, in turn, report to the Trade Commissioner the result of approaches to firms that have been suggested.
20. Trade Commissioners should not extend specific invitations to firms to participate in government-sponsored exhibits. The result could be embarrassing by having acceptances to participate from more firms than can be accommodated. Trade Commissioners can assist the Commodity Officers by suggesting to local representatives of Canadian firms that pressure be exerted on their principals to participate.

### Cost Sharing

21. An important feature of the Department's trade fair program is "cost sharing". When participation in a fair is recommended by the Committee on Trade Fairs Abroad, a decision is made as to whether cost-sharing will be required of participants. How cost-sharing is to be implemented and in what degree is the responsibility of this Working Committee. The active interest of participating firms is stimulated by requiring them to shoulder a portion of the actual costs of exhibiting. —It discourages "going-along-for-the-ride-because-it-is-free". These are the main types of cost sharing now in use:
  - *Flat Fee*—a uniform fee is paid by each participant without regard to the space occupied or display work done. Current practice is to exempt "first-time" exhibitors in a specific fair from this fee.
  - *Pro Rata*—the fee paid by each participant is related to the amount and kind of space occupied and services provided.
  - *Freight Maximum*—a clause is inserted in the contract which limits the amount of exhibit material transported free for each fair. Its purpose is to protect the Department from the possibility of, in effect, subsidizing the export of a single heavy piece of machinery and at the same time limit the Department's liability for freight charges on very heavy items.

### FINANCING THE PROGRAM

22. The money that pays for trade fair participation comes principally from two budgets: The funds allocated to the Exhibition Commission are used to pay for the cost of designing, constructing, equipping, transporting, assembling, maintaining and dismantling exhibits. Any funds authorized for press releases, trade fair literature, advertising, etc. are the responsibility of the Trade Publicity Branch. All the foregoing are identified with and charged against individual fairs.
23. In addition, however, general costs connected with the trade fair program such as the operations of the Trade Fairs Abroad Division, the overhead of the Exhibition Commission, contributions of time by Commodity Officers, Trade Commissioners and others and general services supplied by the Department are borne by the different branches concerned as part of their normal operating overhead.

### ORGANIZATION OF PARTICIPATION

#### COORDINATION

##### Schedule

- 24: Officers in various branches of the Department are involved in the organization of each participation. With our large program and complex projects it is essential to have a system that ensures the contribution of every member of the team will be made at the proper time. The Coordination Schedule of steps to be followed (See Annex "A") enables each person working on a project to know, not only what his own contribution is and when it is due, but also what the others on the team are doing. At the first meeting of the Working Committee, each member receives a copy of this with dates filled in opposite each step.

##### Working Committee

25. The members of the team—with the exception of the Trade Commissioner—form a working committee which is specific to each project. It generally meets three times during the process of organization. At the second and third meetings there is opportunity for the Trade Commissioner's suggestions to be incorporated. He is kept in the picture at all stages with copies of pertinent memoranda and working papers.
26. A copy of the check list used by the Working Committee at its initial meeting can be found at Annex "B". It will give the Trade Commissioner an idea of the kind of detail that is covered and how his initial report can be of assistance. During this period of preparation the Trade Commissioner should reciprocate by sending copies of all correspondence and cables dealing with the project (other than on matters of a straight technical nature which are obviously for the Exhibition

Commission) to the Trade Fairs Abroad Division for the information of those concerned at head office. Such liaison with head office in effect allows the Trade Commissioner to "sit in" on the Working Committee. Furthermore, it ensures that not only will the Trade Commissioner's suggestions and opinions be taken into consideration but his questions answered and any doubts he may have dispelled.

### The Coordinator

27. The responsibility for obtaining products for each project is usually placed in the hands of a coordinator who is nominated by the Director of the Branch mainly concerned, at the request of the Trade Fairs Abroad Division. The Working Committee establishes the product content on the basis of recommendations made by the trade promotion branches and the Coordinator carries out an informal or formal sales campaign directly or through other Commodity Officers, depending upon the degree of cost sharing involved and the scale of the project. He provides information to the Exhibition Commission which may follow up directly with exhibitors on technical details and to the Trade Publicity Branch in regard to the production of literature and press releases. He will make every effort to prevent last minute changes in the product content of an exhibit which raise serious problems in the Exhibition Commission and Trade Publicity Branch.
28. He will compile a "Black Book" containing detailed specification and price information on each of the products exhibited. Prices will be quoted, where possible, on a C.I.F. coastal port basis in local currency or U.S. dollars. If this is to be a useful tool, all personnel concerned with manning the stand should become familiar with it *before the opening of the fair*. It is up to the Coordinator to ensure that any information for the use of the Trade Commissioner only is clearly marked as such.

### Timing

29. The Coordinator is a key figure in the maintenance of the Coordination Schedule and must ensure that information is provided on time to the Exhibition Commission and to the Trade Publicity Branch so that the Schedule governing their independent activities can be adhered to. Of special concern is the provision of information for the text of the exhibit and the literature when it has to be translated into a foreign language. Similarly, when the text is sent to posts for translation or for checking, it must be returned promptly.
30. The Trade Commissioner, in addition to his Information Report on the fair and in addition to the rules and regulations already provided by the fair authorities, should report promptly any new regulations imposed by fair authorities or local governments, or any new developments which would effect the nature of the exhibit. Many mistakes can be saved by early advice on matters of this kind.



Responsibility

31. Any problem dealing with the Coordination Schedule, whether occurring in head office or in the field, should be communicated to the Trade Fairs Abroad Division.

THE SITE AND THE STRUCTURE

Location Of The Fair

32. It is particularly important when considering the organization of a solo show (large or small) to have full information on the location and equipment of possible sites. For large projects it is probable that a representative of the Exhibition Commission will examine the facilities at a very early stage in planning. Annexes "C", "D" and "E" are pro forma information reports for different types of fairs, giving a suggested list of headings to aid Trade Commissioners in reporting.

Location Of The Exhibit

33. Factors affecting the selection of a site for the exhibit within the boundaries of the fair are: location, direction of flow of visitors, nationalities and kinds of adjacent booths and nature and shape of the space itself. These points are enumerated in the Information Reports already mentioned. Floor plans, with Trade Commissioner's comments and recommendations, and application forms should be sent to the Exhibition Commission. Negotiations conducted directly with the management of a trade fair by personnel in Ottawa must be brought promptly to the attention of the Trade Commissioner concerned.

Exhibit Design

34. Although exhibit design and assembly are the responsibilities of the Exhibition Commission, it may be of interest to know some of the factors which must be taken into account. Here again the Information Report serves as a guide. Trade Commissioners and/or Commodity Officers are encouraged to make suggestions which might improve the exhibit. Such things as special occasions during the period of the fair, or even during the year, special appetites of the visitors, things in common with Canada, unique aspects of Canadian products, etc. etc. can be reflected to advantage in the preparation of an exhibit.
35. It is an advantage if the display can tell a story rather than be merely a shop window for a collection of unrelated goods. Products selected can be arranged to illustrate a central theme. This selection will be influenced by the eye appeal of each item—those which move or have color have priority over those which are static. The Exhibition Commission will work closely with the Coordinator in Ottawa to ensure

that a proper balance is kept between products chosen for their ability to attract interest and those selected for sales promotion.

## PUBLICITY AND ADVERTISING

### GENERAL

36. There are many ways in which our participation can be effectively publicized without involving a large publicity budget. When the expenditure of money is required to carry out any specific project, authority from Ottawa must be secured *in advance*.
37. Speeches to clubs and associations by the Trade Commissioner can be prepared to stress our trade fair participation. Trade associations, especially those with close Canadian ties, may be persuaded to include reference to our participation in a regular circular letter to their membership.
38. Counter cards, posters, envelope stickers, press releases, specially prepared printed matter are all items which, if the Trade Commissioner can make a case for them, can be prepared by the Trade Publicity Branch in Ottawa.
39. Liberal use of the telephone to extend an invitation to visit the fair can be productive; e.g. businessmen can be called in spare moments during the week immediately preceding the fair.
40. Direct mail invitations based on an up-to-date selected mailing list are probably more profitable than advertising in the popular press. In seeking the authority for this the time necessary to prepare the list is of great importance. Where participation is in a specialized (vertical) trade show, publicity which is directed specifically to that trade is better than general publicity.
41. Where there are a number of local representatives of Canadian firms participating in a fair, the Trade Commissioner might actively encourage them to advertise on a collective basis. If the Trade Commissioner decides to pursue this line of endeavour, he might well enlist the support of the Commodity Officers in Ottawa who might persuade the Canadian principals to back up the idea with their agents. Such group or collective advertising will probably have more impact than individual insertions. Because circumstances vary so much the Trade Commissioner on the spot is often in the best position to make recommendations as to the best form of advertising to employ. (A proposal by the Trade Commissioner to buy publicity or advertising on television or radio will be examined closely in Ottawa to see if the expense is proportional to the benefit expected.)
42. The scope for supporting events in connection with participation in an established trade fair is not large, but there are possibilities which should be considered.

43. Solo shows, in particular, offer a broad field of possibilities; in fact, the supporting activities are essential to the success of such a venture. Many cannot be organized by the Trade Commissioner on his own authority because they involve substantial expenditures. Officers in the field should carefully analyze the various possibilities and call them to the attention of the Working Committee through the Trade Fairs Abroad Division. Every suggestion will be fully considered in the light of the budget available.
44. In this, as in other fields, close liaison with colleagues in External Affairs can be of considerable help. Their cooperation in terms of manning for general information, administrative assistance and intelligent participation in the planning stages can take much weight off the Trade Commissioner.

#### LANGUAGE

45. Literature, display text, publicity materials and manning staff must utilize the language(s) of the majority of fair visitors. It is important that all translations be checked for colloquialisms, bad grammar, etc., by a qualified language expert at the post concerned.
46. The desirability of having literature available in the language(s) of the post is obvious. In making recommendations, however, the Trade Commissioner should support them with full details so that the expense of special runs can be considered carefully.

#### LITERATURE

47. In deciding what literature will be displayed on an exhibit, the Trade Commissioner and his colleagues in Ottawa will have to examine the appropriateness of each item proposed.
48. A trade fair folder is usually prepared by the Trade Publicity Branch for use as an enclosure in a direct mail campaign and for handout at the exhibit. It is, in effect, a combination promotional piece and catalogue of exhibitors, and is intended for selective distribution. Care should be taken that other printed matter on display, perhaps more colorful, does not detract from the folder.
49. In addition to the trade fair folder specific to each trade fair, the Trade Publicity Branch prepares each year a general folder which, while trade promotional in character, is also designed to be of interest to the general public.
50. Then too, items from other sources, such as "Canada From Sea To Sea" and the "Canada Handbook", are provided for some fairs; because of their cost, these should be distributed with discrimination. Where the Trade Commissioner has asked for them, and has made a good case,

the Trade Publicity Branch supplies a limited number of any special supplements of newspapers devoted to Canada which have been recently published.

51. In addition to the above there may be supplies of literature belonging to the individual exhibitors.
52. It is essential that this be organized to permit of rapid access. This is a reason for the installation of maximum possible shelf space in the storage room. (See Item 126.)

## **DIRECT MAIL CAMPAIGN**

### **Purpose And Planning**

53. A direct mail campaign—the sending of invitations and publicity material directly to potential visitors to the exhibit—is one of the most effective forms of publicity. Well planned and carried out, it can be a personal invitation from the Trade Commissioner to members of a select audience.
54. Careful consideration must be given to the wording of the invitations. If it is intended that the recipients come as guests, free admission cards should be enclosed; if it is merely intended to draw the Canadian exhibit to the attention of the potential visitor, however, the wording should avoid any hint that the entrance fee will be paid. When a commercial mailing service is employed, its advice may be valuable in phrasing a letter in the most appropriate manner.
55. If it is planned to use the brochure produced specially for the trade fair as a "stuffer", consideration might be given to making up one of the pages as a coupon. This could be torn out by the recipient, filled in and returned to the Trade Commissioner with an indication of an individual's particular interest.

### **Method**

56. The ways of preparing invitations vary according to the circumstances. There is no doubt that an individually-typed letter will elicit greater response than a duplicated or printed invitation, but the resources of each office must be examined carefully before undertaking what may be a heavy and costly task. (It is estimated that a competent typist can turn out about 35 two-paragraph single page letters a day working from a prepared address list.)
57. In many countries, there are commercial services that can produce a duplicated letter which cannot be distinguished from an original. On such letters the signature should be original unless the company has equipment for reproducing a realistic looking one. The extra cost of

employing a mailing service should be carefully estimated as it may be well worthwhile in terms of results obtained.

58. For some occasions, a printed brochure may have the necessary appeal, perhaps covered by a compliment slip. Whatever the method chosen, plans should be laid well in advance to ensure that the necessary extra staff and facilities in the office are available when the time comes — trade fairs impose a rigid deadline!

#### Sources For Names

59. After laying general plans, the first step in getting a direct mail campaign under way is the development of a list of intended recipients.

60. It is unlikely that any single one of the following sources will be adequate. All should be followed up for best results:

- The first and most useful source to be exhausted is the Trade Commissioner's own files and Importers' Directory.
- Recourse should then be had to the suggestions of participating firms — they can often provide the names of prospective customers in a particular territory.
- The mailing service, if one is employed, may also be prepared to furnish lists; the cost should be ascertained and the accuracy estimated.
- Business directories, city directories and the "Yellow Pages" of the telephone book may be helpful in some territories.
- Then, too, there are trading associations that are keen to cooperate and some may already have extensive lists on file. Commercial banks may be able to help.
- A fruitful source of names is the registration lists of previous holdings of the approaching fair. This is particularly true of specialized (vertical) fairs.
- Other sources that may be able to supply names are credit bureaus, customs brokers, agents of shipping companies, port authorities, municipal licencing offices and insurance agencies.

61. Addresses should be checked for accuracy. Care should be taken to avoid duplication of names. To achieve maximum impact in a direct mail campaign, it is most desirable to address the invitation to a specific person and to ensure that name, title and address are accurate. Care in these and other aspects, such as elimination of duplicate names, can prevent the recipient from gaining the impression of slipshod work.

#### Routine

62. The physical job of putting a list together can be a tedious and time-consuming one, so plan well ahead. Frequent rotation

of secretarial staff will obviate slowdowns resulting from boredom.

63. Because typed lists are cumbersome to check and compare, names taken from directories or lists should be typed on index cards (perhaps 3" x 5") with the company name at the top left, followed by the address and the names and titles of the appropriate executive officers. When arranged alphabetically, duplicates can then be deleted and "dead" addresses eliminated or changed. The top right-hand corner is reserved for a code indicating the product category and source of the name, e.g. 3-E might indicate a lumber dealer whose name was received from a commercial bank (3) and interested in building products (E). Product categories can be fairly broad for a general show and more selective for a specialized trade show.
64. For the invitation and envelope typing "run", the cards can be kept in alphabetical order for ease of checking, adding and deleting names. After this step is completed, however, they can usefully be rearranged by product category so that separate lists of companies in each group can be typed out for the information of participating firms and the future use of the Trade Commissioner.
65. In developing the mailing list, it is useful to maintain a record of progress made. This enables the Trade Commissioner to spot product categories for which there has been a sparse harvest of names - more attention can then be paid to these - and sources which have been unproductive.

#### Lapel Badges

66. Persons attending the fair as a result of an invitation deserve special treatment over casual visitors or the general public. To recognize them, a distinctive lapel badge can be enclosed with the letter, or advance registration cards (often supplied by the management of specialized trade shows) can be marked in an appropriate way. These important visitors will appreciate this service.

#### Complimentary Passes

67. Most fairs, in addition to the free passes they issue to participants, will provide admission cards at a very modest cost. These, stamped or printed to identify the exhibitor as the Canadian Government, can be mailed to potential visitors. There is sometimes an additional charge per ticket presented which is debited to the participant after the fair closes; authority must be obtained for such expenditure.

#### Stuffers

68. These can be produced in Ottawa, but guidance as to format, language, type of message and wording should be sent to the Trade Publicity Branch long in advance.

**PHOTOGRAPHS**

**For Canada**

69. Photographs of the fair are required in Ottawa for two specific and separate purposes; those required by the Exhibition Commission for record purposes and future planning and those required by the Trade Publicity Branch for publicity purposes. It is rare indeed that one set of pictures will satisfy the requirements of both branches. At most fairs, the Exhibition Commission has a technician to erect and maintain the exhibit; he will also be responsible for obtaining photographs for his branch. Prior to the opening of the fair, the Trade Publicity Branch will get in touch with the Trade Commissioner to give him an idea of the kind of photographic coverage that is needed for publicity and to specify the maximum which may be spent in pictures. Suggestions, in return, are welcomed by the Branch. Photos should be taken as soon as the fair commences and *air mailed* to Ottawa while they still have "news" value.
70. Every photograph should have a caption identifying the place and time of the photograph as well as the names and titles of the people in it, and any additional information which would contribute to its news value. The caption should be on a piece of plain paper stuck to the back of the photograph with scotch tape. Writing on the back of a photograph leaves indentations which make it worthless for reproduction.
71. In some cases, upon the recommendation of the Commodity Officer concerned, the Trade Publicity Branch will send a photograph of a particular display to the company whose products are pictured. Some firms may make such a request direct to the Trade Commissioner, in which case the cost of any photos forwarded to the firm should be debited to the firm on form A.111A.

**For Local Publicity**

72. Good photographs of Canadian products published in the press and displayed in public places make a very effective way of arousing public interest before the fair. And they can give "life" to press releases which may otherwise elicit a mediocre response. The Trade Publicity Branch is the proper place to direct requests for such photographs, but should be given sufficient time (preferably three months) to make the necessary arrangements. Use can also be made of "action" shots, covered by a suitable press statement, while the fair is on.
73. For distributing material to the press, a press table may be set up under the eye of a responsible member of the Trade Commissioner's staff; from it reporters may draw photographs of their choice and a folder of press releases - a "press kit". The attendant should record the photographs given to each publication and keep this record available for other reporters to consult. In this way each can ensure that he gets a photograph different from those taken by his competing colleagues.

**ADVERTISING**

74. Rate cards for each publication proposed as a medium must be submitted to the Trade Publicity Branch not later than 5 months in advance of the exhibit, so that, if advertising is authorized, funds can be set aside and "copy" prepared.

**Newspapers**

75. The effectiveness of press advertising in the daily or weekly press for our purposes is subject to circumstances. It may be well used for collective advertisements by a group of exhibitors. If so, the Trade Commissioner could ask the Commodity Officers in Ottawa to persuade the Canadian exhibitors that such collective advertising might be advantageous. For those firms with local agents, the Trade Commissioner could organize the advertisement. For those without representation, Trade Publicity Branch might take on the task of organizing the advertisement.
76. The Trade Commissioner's press relations may be better with those media in which he places paid advertisements; goodwill may be a not necessarily conclusive factor in deciding to advertise. Insertions in the daily press are of value chiefly when it is desired to attract the general public to the exhibit.

**Periodicals**

77. When the target of the advertising is the buyer or importer, advertising in trade periodicals will show better returns. In the period leading up to a fair, it is possible that trade periodicals will be glad to publish articles on pertinent Canadian industries or processes. If this is the case, a request for material should be sent to the Director, Trade Publicity Branch, well in advance.

**Fair Catalogue**

78. The Trade Commissioner will have to make a case for advertising in the Fair Catalogue. All particulars should be sent to the Trade Publicity Branch well in advance in order to provide the required layout time. As soon as the first list of participants is sent to the Trade Commissioner, he should "expose" their local representatives to the idea of advertising on their own or collectively. Care should be taken to ensure that the catalogue shows the Department of Trade and Commerce as the exhibitor.
79. It should be made clear to the fair authorities that the exhibitor is the Department of Trade and Commerce.



Radio And Television

80. Costs must be studied carefully in relation to the audience. Spot announcements and short features describing some facet of the Canadian participation in the local fair have more impact than a general invitation to visit the Canadian exhibit.
81. In countries where advertising on these media is not possible, or where costs of straight advertising are high, it may be possible to persuade the broadcasting authorities to arrange an interview with a Canadian "V.I.P." who would then make reference to the Canadian exhibit. Many such people appreciate being provided with an appropriate draft script, and suggestions for props.
82. Television lends itself to programs illustrating Canadian products and tourist attractions and featuring visiting personalities or groups of artists. It is difficult to interest broadcasting authorities in such activities much in advance of the fair — as the momentum of publicity gathers, they may "climb on the bandwagon" much more readily. Oft times careful cultivation of those responsible for scheduling radio and television programs will give good results.

Other Vehicles

83. There are numerous other methods of advertising and media in which to do it. Among the material made available by the Department are:
  - Stickers for correspondence — these are chiefly useful for letters directed to prospective trade fair visitors by the Trade Commissioner or by Canadian firms or their local agents. They should be stuck to the letter, not the envelope.
  - Counter display cards — for use in department store windows, bank counters, in the offices of transportation companies, chambers of commerce and trade associations.
  - Posters — can be pasted up where permitted by law and within the cost budget.
  - Trade Association Bulletins — possibility of write-up on Canadian participation.
  - "Dodgers" or small pamphlets designed for hand-out or insertion in some non-Canadian publications.

**PRESS RELEASES**

84. Time and thought put into the preparation of press releases can pay handsome dividends. They should be triple spaced on quarto paper, with wide margins, on one side of the paper only, and in the language(s) of the country. Wherever possible, the Trade Publicity Branch designs and prints a special press release letterhead of which supplies are made available to the Trade Commissioner.

85. The Trade Publicity Branch prepares one or more press releases for each exhibit. Should Trade Commissioners have suggestions for articles they feel will be acceptable in their territories, they should send them to the Director, Trade Publicity Branch, as soon as possible.
86. Writing acceptable press releases is an art and is perhaps better left to the experts. From time to time the Trade Commissioner may prepare them because of urgent requirements or local circumstances. North American newspapers, on the whole, employ a breezy journalistic style but editors in other parts of the world may prefer a more formal presentation. Whatever the local custom, press releases should be written so that they appeal to local needs - otherwise they will probably be consigned to the wastebasket unless the paper is desperate for news.
87. An "extra" that renders press releases doubly acceptable is the attachment of photos of products, people, or events described. This gives the editor a focal point for the article and ensures vastly greater attention from the casual reader.
88. At the time of a fair, individual members of the press may be replete with entertainment. A reception is, then, no guarantee of coverage by the press or that coverage given will be favorable. Preferably the reception should be linked to some fresh idea which will allow the reporter to interest his readers. For example, if members of the press can be told in advance that a Canadian "V.I.P." will be present, it is likely that they will attend. Care should be taken, however, that the person really is a V.I.P. and that his or her presence can be counted upon. (See also items 155-160.)

#### SPECIAL NEWSPAPER ISSUES

89. If a newspaper publishes a special issue on Canada, the Department may be able to obtain copies for distribution to interested local businessmen before the fair opens.
90. Any work with the press must be carried out with the close cooperation of the Trade Publicity Branch. Some newspapers publish special trade fair issues or supplements. Local papers, of course, have a much more effective appeal for the general public. In the search for material they can be expected to approach the Trade Commissioner for:
  - An advertisement by the Canadian Government; circumstances may or may not permit or warrant an advertisement by the Department. Details of the proposed advertisement and the Trade Commissioner's recommendations should be sent to the Trade Publicity Branch.
  - A message from the Minister of Trade and Commerce may be undertaken when there are some special circumstances or the trade fair participation is a very important one. The Trade Commissioner should not place himself in a position of possible

embarrassment, by guaranteeing that such an article will be forthcoming. It is only after a careful examination of the Trade Commissioner's reasons in favour of such a request, supported by a copy of the publication and detailed information on its circulation, importance and reputation, that a decision will be made at head office.

- Material on tourism in Canada. The Canadian Government Travel Bureau can often make suitable material available. Travel articles create as much interest among buyers as among the general public.
- Stories on Canadian industry and on economic conditions.
- Economic reports which may show prospects for the establishment of branch plants or licencing arrangements in Canada.
- The names of firms participating in the Canadian exhibit from which advertisements can be solicited. Such requests should *not* be met unless the release of the information will directly benefit the Department's trade promotion objective. When in doubt, clear it with Ottawa.

#### ENTERTAINMENT

91. When connected with a trade exhibit, entertainment, though important, is an enticement; it should be viewed in proper perspective. A hazard is that the entertainment may receive more emphasis than the exhibit itself.
92. Certain activities, for example film and fashion shows, contain an element of trade promotion. Those activities which are pure entertainment (e.g. dancers, singers, comedians) are most likely to be included in a solo fair. They should be carried out so as to include frequent references to the exhibit and its trade promotional purpose. It is important that the Trade Commissioner's views on what type of entertainment is appropriate should reach the Trade Fairs Abroad Division as early as possible.

#### SPEECHES

93. Service clubs, chambers of commerce and civic organizations provide platforms for publicizing the exhibit and Canada as a source of supply. Careful selection must be made to avoid heavy inroads on the Trade Commissioner's time. English language clubs may offer a good audience when they include members of the business community.

#### STORE AND OTHER DISPLAYS

94. As mentioned with regard to radio and television authorities, retail outlets are slow to evince interest in a promotion effort until the whole

project is well under way. Some, seeing promotional possibilities in a venture at the last moment, will then be interested in Canadian back-drop material for a window display or merchandise island. Banks or trade associations which have a meeting or convention scheduled close to the opening date, may also be interested. Requirements for material of this nature should be anticipated; supplies from Ottawa should be sought sufficiently ahead of the event and might include an assortment of flags, crests, large photographs, etc..

95. Needless to say, every effort should be made to encourage local stores to display Canadian merchandise in concert with our participation in a fair.

#### SPECIAL EVENTS

96. Of particular importance, when a "Canada Week" has been organized in support of a trade fair participation, are events designed to catch the eye of the public. Examples are:

- Group visits to the exhibit from schools and other institutions.
- The Trade Commissioner or Ambassador might offer a prize for the best essay about the Canadian exhibit leaving the judging to the school's headmaster.
- Local newspapers might be willing to organize or attend a press conference at which the Canadian Ambassador or visiting political figure is "put on the spot" by a group of students.
- Visits by leading Canadian personalities from fields such as politics, sports, the arts, the entertainment world.
- Visits of Canadian naval vessels or armed forces with their consequent colorful ceremonies supported by a military band.
- Games between local and Canadian teams.
- Performances by Canadian theatrical or musical groups and artists.
- Exhibitions of Canadian art and handicrafts.
- Tours of local industries and transportation installations by visiting Canadians.
- Visits of local armed services groups to inspect technical equipment included in the exhibit.

97. These suggestions indicate what is possible in this field; Trade Commissioners should consider and report to the Trade Fairs Abroad Division, on these and any others they consider have potential value.

#### FILMS

98. There are several ways in which films can be shown: in local movie houses (usually for a fee) as part of their ordinary program, at the

exhibition cinema (usually for a fee), in a private cinema and in the exhibit area itself with either a standard projector and screen or with a rear projection unit. A "trailer" inviting the audience to visit the exhibit would cost about \$50.00 (for 15 seconds) if produced by the National Film Board.

99. At one fair where we had our own pavilion, the Trade Commissioner mounted a projector on top of the office space and at the end of the pavilion hung a large screen on which films were projected. They could be seen from nearly every point in the building. Rear projection units can also be useful in some cases but care should be taken that they are properly located and do not jam traffic flowing through the exhibit. Provision for the showing of films should be incorporated in the design. For this reason it is important to consult the Trade Fair Abroad Division at an early stage.

100. Early attention should be given to the selection of films so that there is time left to ask Ottawa to ship additional titles. The Department of External Affairs, Information Division, can give valuable help in this field. While the bulk of the films shown will be from the National Film Board library, private manufacturers may have titles that will appeal to segments of the local business community. Titles should be selected keeping in mind the type of audience that will be present at the time of day when the film is to be shown. For instance, "Here's Hockey" could well be shown to visiting school children. Short subjects can be held in reserve for special groups.

101. The duration of each film program should be given careful consideration. It is better to have people go away wanting more than having had too much. It is useful to have printed schedules prominently displayed at strategic locations. Thought might be given to persuading the restaurants on the fair grounds to insert a copy of the schedule in their daily luncheon menus.

102. If the cinema is operated by the Department as part of or as an adjunct to the exhibit, the staff problem should be kept in mind. It is impossible for one person, no matter how small the unit, to act as projectionist, commentator, usher and an attendance counter. Assistant with this may be arranged with External Affairs Officers on the spot.

103. Don't forget safety precautions; floor lighting when the theatre is in darkness; fire prevention — the local fire chief should be prepared to give advice on the safety aspect.

#### FASHION SHOWS

104. The decision as to whether to hold a fashion show or not is a major one which will be made in Ottawa. The Trade Commissioner who is in favour of holding one should make his views known early in the planning.

### The Objective

105. A fashion show at a trade fair will have trade promotional value, but it is an excellent publicity "peg" upon which press reports and photographs can be hung.

### Key Personnel

106. Whatever the purpose of holding a fashion show, there are various steps necessary in its organization. Initially, it is necessary to arrange for personnel who will be involved — models, coordinator, commentator. You should know the cost of utilizing a top model agency which will employ experienced models who can accommodate themselves to a variety of circumstances. It is likely, in addition, that the agency will have or know of a suitable coordinator, the person responsible for all backstage arrangements. The commentator has a priority job — she must know her fashions, her textiles and her industry and must be able to speak in a clear cultured manner to be thoroughly effective.

### The Necessary Props

107. Following these basic arrangements, it is necessary to organize essential incidentals. They include music, flowers for decorations and for presentation to the commentator and coordinator, a typically Canadian backdrop for the stage, a pair of receptionist-hostesses to greet and seat invited guests and a quantity of printed invitations (about 50% more than the number of guests expected).

### Seating And Hospitality

108. The arrangements for different types of guests vary. Seating for business guests can be auditorium style, while that for a "society" show should be around tables for 6 or 8. Public shows can utilize both auditorium seating and standing room. It is customary in some countries to serve cocktails prior to a show for the trade, but a rigid closing hour for the bar must be observed if the show is to get underway on schedule. Tea and cakes will often suffice for the society show, although cocktails may be necessary in some cases. Careful thought must be given, well in advance, to the question of whether the audience will or will not pay for their own refreshments.

### The Guest List

109. The development of a guest list for a "trade" show requires the care involved in preparing a mailing list for a direct mail campaign (see items 53-68) — don't neglect to invite the fashion editors of the local dailies and weeklies. A guest list for a "society" show requires different

sources. These will include the social and fashion editors of the newspapers, the model agencies, women's clubs, "leaders" of society and the diplomatic list. Names, when received, should be arranged alphabetically, and coded as to source to aid with seating arrangements at a later stage.

110. This list is a most important facet of this type of show — it is essential that compatible groups of roughly the same "social standing" be seated together. The low numbered tables which are in preferred positions should be reserved for the scions of the local social scene together with the wife of the Head of Mission. Wives of other members of the Canadian mission should find places throughout the audience. Women's and fashion editors should be invited also to this type of show.

#### Hostess

111. It is proper that the wife of the Head of Mission act as hostess for a society event; she should have the senior Trade Commissioner's wife as co-hostess. The wives of other members of the mission and, too, the wives of resident Canadian businessmen may well enjoy the responsibility of looking after individual sections of the hall to see that all goes smoothly.

#### Press Reception And Photographs

112. An essential part of the fashion show operation is the securing of suitable publicity. Although some will be generated by the very attendance of social and fashion editors, much greater response can be obtained by having a press reception a few days prior to the show. It is a function at which the commentator can be introduced to the press (especially if she is a stranger) and where editors and reporters can pick up suitable photographs of their choice (see comments about press kits Item 73). The latter should have been taken on the local scene just a few days previously.

#### PUBLICITY GIMMICKS

113. There are many "gimmicks" which can be used for publicity purposes — to entice people to pay particular attention to the exhibit and to provide special "angles" for newspaper reporting. Costs must be calculated carefully well in advance. They include:
- A reception tied in with the visit of Canadian personalities, units of the armed services, theatrical groups and the like.
  - Giveaway items such as shopping bags, ash trays, paper weights, key rings, pencils, food samples, book matches, covers for school books printed with a map of Canada. Cost, dignity and relevance to the Department's objectives will be the factors governing the selection of such things.

- Small packets of used Canadian stamps for collectors can be collected in the Trade Commissioner's office in the 3 or 4 months before the fair opens.
  - Special buses, identified in some way with our participation in a fair, to bring people from the downtown area to the fairgrounds. Participating firms might be interested in assuming such expenses.
  - Royal Canadian Mounted Police officers on duty in scarlet tunics.
  - Asking a main hotel to reserve a section for Canadian visitors; perhaps influencing the hotel to publicize the Canadian exhibit.
  - Displays of novel or extremely valuable items such as a stage coach, teepee or famous painting.
  - Sound trucks touring a thickly populated section of town before the fair can be useful.
114. Ideas for activities of this kind must be cleared with the Department. Most require consideration by the Working Committee and financing from the vote of the Exhibition Commission or the Trade Publicity Branch.

#### CHILDREN'S FACILITIES

115. Facilities for children can range all the way from a playground to a small area with a rocking horse and a few children's chairs. Particularly when recommending the organization of solo fairs, Trade Commissioners should consider the need for such facilities. Before providing them, though, the Exhibition Commission will obtain legal advice as to the extent of our liability in case of accidents.

### PARTICIPATION OPERATIONS

#### RESPONSIBILITY FOR THE OPERATION

##### Authority

116. It must be assumed that activity arising from participation in a trade fair will have priority over the normal work of the office abroad.
117. The Trade Commissioner is in charge of the trade fair operation in his territory and must be the final authority for decisions concerning it. Naturally, the Trade Commissioner will be guided by others, more experienced in matters in which he is not expert.

##### Exhibit Expenses

118. Most expenses of the exhibit itself on site are a charge against the Exhibition Commission vote. Consequently, the Trade Commissioner



must have a clear understanding with the Commission as to how expenditures are to be approved.

119. Funds are provided by the transfer of an estimated amount to the Trade Commissioner's Contingent Account or, depending on the scale of the operation, to a separate account to be handled by the Trade Commissioner or by a representative of the Commission. The regular monthly Contingent Account procedure is followed, and exhibit expenses are charged against the proper vote in Ottawa.
120. Except for projects on which the Trade Commissioner has received prior authority, the control of expenditures rests with the Commission's representative; all commitments should be made by him and accounts certified by him. Invoices on which an item is defined merely as "Miscellaneous" should not be accepted. In the event that the Commission does not send a representative or if he is unable to remain long enough to wind up the operation, arrangements will be made with the Trade Commissioner for the settlement of accounts. When acting in this capacity, the Trade Commissioner is the agent of the Exhibition Commission.

#### OPERATION OF EXHIBIT

121. For nearly every fair, technical staff from the Exhibition Commission will be sent to the post to erect the exhibit, arrange the display of products within it and assure that it is properly maintained. In some cases it might be practicable to release the office's senior clerk to aid the Exhibition Commission representative in coping with a foreign language or local customs.
122. Commission personnel are always ready to try and adapt matters, on the advice of the Trade Commissioner, to suit local circumstances. In discussing any changes which seem necessary, both the Trade Commissioner and the Exhibition Commission representative should keep firmly in mind the original purpose of the exhibit as approved by the Trade Fairs Abroad Committee.
123. Before the opening of the fair, the Trade Commissioner should check every item in the exhibit to ensure that only goods of Canadian origin are on display.

#### Maintenance

##### Char service

124. It is essential that adequate provision be made to keep the stand tidy at all times. The routine cleaning and dusting provided under contract by the fair authorities may not be sufficient. Members of the manning staff (including the Trade Commissioner) should have a dusting cloth readily available and be prepared to use it. When possible, the

Exhibition Commission incorporates a storage room into the design of the stand; care should be taken to ensure that the office is not used for this purpose. A large trash bin should be kept behind the information counter so that candy-bar wrappers, discarded pamphlets, old newspapers and all the other flotsam and jetsam of the passing crowd can be disposed of easily.

#### **Refurnishing exhibit**

125. It is inevitable that photographs, signs, products, etc., will become marked and dog-eared during the course of the fair. It is the responsibility of the Exhibition Commission representative to effect suitable repairs. He will cooperate closely with the Trade Commissioner in keeping the exhibit in first-class condition.

#### **Restocking literature and other supplies**

126. Space is usually provided beneath the information counter for the storage of a supply of literature sufficient for a day or so. Replacement will be made daily by the Commission representative from supplies stored in the storage room or in storage facilities elsewhere. The Trade Commissioner should check daily on the need for extra office supplies, directories, etc., that should be brought from his office.

#### **Equipment**

127. There are various pieces of equipment and furnishings that make an exhibit a more pleasant and efficient place in which to work. The inclusion of some of these must be planned during the design period, and the Working Committee will discuss them at the progress and design meetings. (See Annex "A".) Others, obviously, can be added at any time, but it may be necessary for the Trade Commissioner to make provision or obtain approval for them in advance. The following check list and comments may be of value:
- Information counter — the base for handing out literature, making appointments, treating casual enquiries.
  - Stools — rubber-shod stools with backs and rungs allow those manning the information counter to relax and yet remain in an alert position. Staff seated on low chairs may give the appearance of exhausted boredom.
  - Name plates — to show the name of the officer on duty.
  - Call system — in large pavilions, where there is a considerable number on the staff, it might be advisable to plan for a "call" system of quiet bells so that individuals can be located with a minimum of disturbance.

- Guest book — to register serious enquirers and distinguished visitors. A ball-point could be attached by a chain.
- Lounge area — a space equipped with coffee table and occasional chairs for interviews for which absolute privacy is unnecessary.
- Map — a large map of Canada is a "must" — everyone is curious about the geography of strange places and a map aids description.
- Periodicals rack — the lounge area provides a place for interested visitors to peruse Canadian magazines on display. This also reduces the hazard of pilferage.
- Ash trays — this simple item should not be overlooked.
- Private office — properly equipped for private interviews with businessmen.
- Telephone — for communication with the office on urgent matters. Keep well out of reach of general public.
- Typewriter
- Stapler
- Scotch tape — indispensable!
- Stationery
- Sundry office supplies such as paper clips and scissors.
- Storage room — every exhibit requires supplies which are unsightly but necessary, such as bundles of literature. A locked area provides extra and very essential security.
- Shelves — to make maximum use of limited storage room space.
- Coat hooks — nobody likes their clothes on the floor!
- Wastebaskets
- Fans — exhibit halls and small enclosed booths can become unbearably hot!

### Security

128. Prior to the fair, the Exhibition Commission will make arrangements for security staff with the Trade Commissioner. It is usually possible to employ watchmen from a staff of guards retained by the fair authorities. An alternative is to hire retired policemen or guards from a local protection service; the local Chief of Police may be able to provide a list of suitable people and agencies. No chances should be taken with valuable articles, such as furs and delicate instruments; they should be displayed out of reach of the casual passer-by and stored during the quiet hours in a locked room. A room with no ceiling, which is usually the case with an office incorporated into an exhibit, offers little resistance to a burglar.

129. The greatest risk of casual pilferage occurs during the hours before closing each day and, particularly, in the last two hours of the final day of the fair and during the "packing-up" period. It is at this time that the staff manning the exhibit must be especially observant. Some form of identification should be provided for the Trade Commissioner's staff, Canadian representatives, and agents, without which people would not be allowed on the stand by the guards.
130. Sometimes a small detachment of Royal Canadian Mounted Police is made available for duty at a trade fair; their presence on the stand in scarlet uniform is a great attraction. In connection with the planning of security arrangements, however, it should be remembered that a member of the R.C.M.P., except under circumstances other than those under discussion, has no police powers outside Canada.
131. If a visitor is caught in the act of stealing an article, an effort should be made to detain him until a guard arrives to whom the thief can be turned over. Care should be exercised, however, in physical detention — better to lose an article from the exhibit than risk the unfavorable publicity of an "assault" story.

#### Insurance

132. The exhibit material, unless there are exceptional circumstances, need not be insured. Participants showing valuable equipment will be advised by the Department to take out their own coverage. Public liability insurance is sometimes obligatory at all fairs, and the Exhibition Commission will make all the necessary arrangements. A routine check that such insurance coverage is in force would be in order.

#### Disposal of Exhibit Material

133. Commodity Officers must ensure that instructions are obtained from each participating firm for the disposal of product samples at the conclusion of the fair. Such information should be shown in the "Black Book", (See item 28) if there is one, or sent to the Trade Commissioner separately. In either case, the Exhibition Commission should be provided with the details. If products are to be sold by the Trade Commissioner on behalf of the exhibitor, the Commodity Officer should obtain proper authority and invoice forms from the company and forward them with the Trade Commissioner's copy of the "Black Book".
134. Every effort should be made to encourage participants to sell their exhibit samples locally at the close of the fair. In the case of heavy equipment, local sale can effect a substantial reduction in the overall return freight bill payable by the Canadian government. If the participation is a large one, consideration should be given to arranging, with the exhibitors' prior approval, that a local customs broker will, at the close of the fair, take over all the products of firms wishing to sell

their samples but not yet represented. If the Trade Commissioner takes on this responsibility (it is one full of headaches!) he should insist on payment in advance by certified dollar cheque payable to the firm whose goods are being sold. The contingent account should not be used to credit Canadian firms with cash payments received on their behalf.

135. It would be a wise precaution to make a special note of any material loaned to the exhibit by local agents. Without such a record, it would be quite easy for such items to be inadvertently packed up and sent to Canada.

#### MANNING

##### Staff Requirements

136. Trade Commissioners should rely, as much as possible on their regular office staff to cope with a trade fair participation. There is a good reason for this; the benefits of participation are long term, and continuity of staff brings the experience gained at the fair itself to bear on the follow-up process. An effort should be made, therefore, to assign any specially-hired office help to routine tasks, utilizing the regular staff for jobs specific to the fair.
137. The need for extra staff should be considered well in advance — six months ahead of the fair. Two categories should be kept in mind; personnel required for duty at the exhibit, and those needed during the preparatory period (to aid with a direct mail campaign, for example) or to replace those seconded from the office for exhibit duty. If it is necessary to employ staff specifically to work on the stand, an assessment of requirements should be made and forwarded to Ottawa (Official Instructions L-7-24-2). Office staff may be hired (Official Instructions L-7-24-1). In the case of a large or complex project where preparations will require the full-time attention of an officer, the possibility of strengthening the post should be taken up with the Assistant Director (Personnel), Trade Commissioner Service.
138. If the participation is large, or incorporates an unusual feature such as a fashion show, there will be many messages and errands to be run immediately prior to the event. Trade Commissioners should consider the need for hiring a chauffeur for their personal cars for a period of two weeks or so. Clearance must, of course, be obtained from Ottawa well in advance. It is sometimes possible, and even desirable, for Trade Commissioners in neighboring posts to assist with the actual manning of an exhibit. In some cases, these adjacent offices may be located in a territory which is covered or influenced by a particular fair, e.g. Cape Town and Salisbury in relation to the Rand Easter Show at Johannesburg. Thus, there can be an advantage in asking one's colleagues for assistance. Requests for such an arrangement should

be broached with head office in the first instance. Similarly, if it is felt that a Commodity Specialist from Ottawa would be appropriate, a case should be made for it in careful detail and a request forwarded to the Trade Fairs Abroad Division bearing in mind the expense that is involved.

139. In contemplating the number of people needed to staff the exhibit, account should be taken of the contribution to be expected from participating firms or their agents. Although agents who do not work exclusively for the Canadian firms may be reluctant to make themselves available full-time, a company's own local representatives can be given a feeling of "belonging" by being asked to share in the manning task. Another source of assistance is the personnel of other departments at the mission. They are frequently able to help in the film and publicity fields as well as at the exhibit itself. The Head of Mission should obviously be included in plans for any reception to be held, so that this presence may be counted upon. Close cooperation will be obtained by ensuring that all of one's colleagues at a post are apprised of developments as they occur in the planning period.

#### Schedule

140. The Trade Commissioner must institute a system to ensure the most effective exploitation of the participation. He, himself, is expected to be present at the stand as much as possible and, when not there in person, he should be readily available by telephone.
141. A schedule should be established before the opening of the fair whereby specific times are assigned for each individual to be on duty. Where possible, different functions should be rotated amongst the responsible personnel. This adds to their interest. In making up the duty roster cognizance must be taken of "peak" hours, "quiet" hours, and essential absences for meals.

#### Staff Appearance And Identification

142. Care must be taken to impress upon staff the need for a neat and alert appearance at all times as this is the "front" for Canada at the fair. Each person on duty should be identified as a member of the Canadian exhibit. The Exhibition Commission can supply several kinds of identification badge ranging from a small maple leaf pin to a ribboned lapel badge with space for the wearer's name. A stock should be ordered well in advance (two months) of the fair.

#### Hotel Accommodation For Staff

143. For projects taking place in large cities which make heavy demands on a Trade Commissioner's "off" hours, provision for hotel or other

downtown headquarters may be useful. It will be found suitable not only for staff meetings and the essential paper work, but also for the entertainment of officials, exhibitors, and certain visitors. If the Trade Commissioner considers such accommodation necessary, he should request the necessary authority at least six months in advance of the fair.

#### Trade Commissioner's Office Files

144. Participation in a trade fair in which our exhibit is straightforward probably requires no breakdown of files to handle correspondence. But for a large exhibit, or one in which there is a feature out of the ordinary, it is helpful to subdivide the file specific to that fair into various topics, e.g. general, fashion show, supporting activities, receptions, luncheons, publicity and photographs, space and exhibit structure and so on.

#### ENQUIRIES

##### Receiving Visitors

145. The chief purpose of trade fair participation is to make new trade contacts, so that the arrangements for receiving visitors are most important in creating the proper impression. Someone conversant with the products on display and who can speak the local "business" language fluently should *always* be available to answer enquiries. Even though trade literature may be so placed that it can be picked up by the casual passer-by, an effort should be made to see that a piece is placed in the hands of those that make enquiries. A guest book (see Item 127) is a convenient way of keeping track of such persons.

##### Interviews

146. If the enquiry is a serious one, it is usually more convenient to invite the individual into the lounge area for an interview, or into the private office if circumstances so warrant. In some countries it is appropriate for the Trade Commissioner to serve beverages to visitors; this must be confined to the private office.

##### Recording Enquiries

###### The form

147. It may be found that different posts require somewhat different treatment of enquiries, hence the questions on the form itself may vary. Headings should be made up so as to facilitate "leading" the interview. The form shown as Annex "F" will probably be a useful guide

to the majority of posts. A supply of the pre-carboned enquiry forms used at the Export Trade Promotion Conference is maintained in Ottawa and can be ordered by any Trade Commissioner who believes they will meet his requirements.

148. Keep a stapling machine handy to fasten visitors' cards direct to the form. It is important, irrespective of the form used, to indicate on it what action has been taken or information given and what is required during "processing". Copies should be made for distribution to all concerned including the Trade Fairs Abroad Division.

#### Processing

149. The actual method of following up an enquiry will depend a good deal on the modus operandi of the individual Trade Commissioner. Local circumstances vary so much that no rigid line can be laid down. It has been found by many Trade Commissioners that every enquiry on which some action has been taken or must be taken should be acknowledged. If this can be done within 24 hours of the receipt of the enquiry, so much the better. It explains the inevitable delay on those that require action, and is good public relations for those already fully dealt with. A form letter will usually suffice.
150. Processing enquiries is, without a doubt, the prime duty of a Trade Commissioner at the conclusion of a fair. In fact, he may be able to do some of the work while the fair is still in progress. This activity should be well under way before reporting the results to Ottawa.
151. On the interview reports that are forwarded to Ottawa, those that require action by the Commodity or other Officer should be clearly marked and give an indication of the action already taken. Some Trade Commissioners prefer to do this by individual memo, but this is not essential provided the enquiry form carries all the relevant data.

#### Non-commercial enquiries

152. If these cannot be handled on the spot, they should be recorded on the commercial enquiry form with a copy sent at once to the person competent to deal with the matter.

#### Information Library

153. Many enquiries can be dealt with on the spot if the proper information is available at the exhibit. For the period of the fair, the Trade Commissioner may find it helpful to transfer some of the following items from his office to the exhibit:
- Commodity "Black Book" (See Item 154)
  - "Trade of Canada - Exports" - DBS



- "Trade of Canada—Imports" — DBS
- Local import and export statistics
- "Canadian Trade Index"
- "Fraser's Canadian Trade Directory"
- Other Canadian industry directories
- Local import regulations
- Local customs tariff
- Local tax regulations
- Local business and industry directories
- "Canada Year Book"
- "Canadian Government Publications"
- "Doing Business in Canada"
- Food and Drug Act and Regulations
- Income Tax Regulations
- Exhibitors' Kit (See Item 174)
- Guidance Manual

Commodity "Black Book"

154. A volume that requires additional comment is the Commodity "Black Book". (See Item 28.) An attempt is made, for every general fair at least, to compile a catalogue of pertinent information on each participating firm and its products. All available company literature and price information is included, as well as a summary of the firm's foreign representation and its instructions for the disposal of samples at the conclusion of the fair. (See Annex "G" for a sample information sheet.) Commodity Officers should be careful to indicate on each price list just how the information can be used, e.g. can it be quoted to all enquirers? Two copies of the "Black Book" are normally forwarded to the Trade Commissioner about 6 weeks prior to the fair, so that the information will be useful in finalizing a direct mail campaign.

RECEPTIONS

155. An official reception may be useful in creating publicity.
156. The Trade Commissioner who is considering a reception should examine what benefits will be derived from it. Thought should be given, if it is planned to hold the function at the exhibit, to the possible ill-will created by the necessary exclusion of the bulk of visitors to the fair who are forced to stand at a distance and watch invited guests being specially treated.

157. If it is decided to hold a reception, any participating Canadian firms or their representatives should be invited to join in planning it. They might even be given the opportunity to share the cost on some equitable basis. Representatives of Canadian firms can be of great help in introducing guests to one another.
158. When drawing up a guest list, remember that the representatives of the press, the fair management, and the diplomatic corps may be surfeited with entertainment on such occasions and hence may, in many cases, attend a Canadian reception only from a sense of duty.
159. Be sure to include the Head of Mission in the planning of a reception—his presence will add to the function.
160. If the cost of official entertaining is to be reimbursed from special funds, the approval of Treasury Board must be obtained *in advance*. At the present time Treasury Board will not consider such reimbursement unless a Trade Commissioner is able to show that he regularly spends his representation allowance and that its use for a trade fair reception would create hardship. Merely as a guidepost, it is suggested that hardship would be the result if a reception were to cost a Trade Commissioner a sum equivalent to three or four months' payment of the representational element of his allowance. (See Guidance Paper 103.)

## RELATIONS WITH LOCAL ORGANIZATIONS AND INDIVIDUALS

### Agents

161. Local representatives of Canadian firms can be of considerable assistance to the Trade Commissioner. Try to get them in the act early. Even though commission agents who also represent other principals cannot be relied upon to the same extent, they should also be given the option of participating in the preparations for an exhibit.
162. Advertising is a field where the group approach can be effective. Local representatives might be persuaded to share in organizing a composite advertisement or a publicity gimmick designed to attract attention to the Canadian exhibit. It is helpful to have a representative of the Trade Commissioner's office invited to attend meetings at which such a project will be discussed in order to ensure that he can give guidance to the project.
163. If a reception has been approved, agents and representatives should be given an opportunity to submit a list of people to whom they would like invitations sent—this is particularly effective in persuading them to share the cost. The agent can be given added kudos by writing, "Sent at the request of A.B.C. Company Limited", at the bottom of the invitation card. Local representatives can also be of considerable help in the preparation of lists for a direct mail campaign. They can be

helpful in making guests feel at home at a reception. When a local representative of a Canadian manufacturer of a product on display is not in attendance at the stand, pertinent enquiries should, nonetheless, be referred to him. It is useful if he can be advised of them on a daily basis. Agents should be discouraged from trying to handle public enquiries for other than their own products.

#### Trade Fair Authorities

164. Minor problems are inevitable, and the closer and more personal the Trade Commissioner's relations with the individual members of the fair authorities' staff (including the clerical level), the more quickly and easily will problems be solved. Cultivation prior to the fair can "pay off", and a Trade Commissioner may wish to invite such persons to lunch or dinner weeks or even months in advance.

#### Adjacent Exhibitors

165. It is good policy to make the acquaintance of one's neighboring exhibitors. If a reception or special gimmick is scheduled, the neighboring stands should be informed so as to avoid any conflict in plans. They may well return the courtesy.

#### Customs Authorities

166. Specific directions for customs entry should be sent to the Exhibition Commission at least three months before the fair.
167. When a fair is over there are usually problems with goods which, at the time of importation, were to be returned to Canada, but which have, for one reason or another, been earmarked to stay. In some countries this causes little difficulty but in others the customs procedures may be difficult. The best way of reducing the trouble is to discuss the problem with customs officials before the exhibit arrives; special instructions may be forthcoming for addressing or documenting the shipment which will serve to facilitate matters at the conclusion of the fair. The Trade Commissioner should attempt to arrange the entry of all goods in such a way that, when the fair is over, individual items can be disposed of on site (if sold then the buyer should be responsible for the payment of customs duties when he takes delivery), placed in bonded storage pending a decision on their disposal, packed separately for shipment to a place other than their point of origin or returned to Canada.
168. Every effort should, of course, be made to persuade Canadian companies to sell their exhibited goods abroad. This is particularly true of heavy equipment on which freight costs are high.

### Appreciation Letters

169. During the course of the fair keep a list of the names of persons or firms who have been particularly helpful to the Canadian participation and who merit a "thank you" letter. A little note beside each name, mentioning the service rendered, makes the subsequent preparation of such letters very simple.

### COMMERCIAL INTELLIGENCE

170. One of the advantages of trade fair participation is the opportunity of learning about the competition. Products from various countries and enquirers from different countries asking questions can be the source of much valuable information to the Canadian manufacturer. It may occur that, in the course of a conversation with a passing businessman, even though it may not qualify as a trade enquiry, the Trade Commissioner can pick up information on adjustments or modifications to Canadian products to meet local requirements and tastes. For some products, the information picked up during the fair may be such as to indicate that a market survey should be carried out to obtain more detailed information. Regular tours of the fair, notebook in hand, may also turn up information useful both to manufacturers and to the Exhibition Commission.

### RELATIONS WITH CANADIAN EXHIBITORS

#### Registration

171. Provision should be made on the stand for incoming Canadians, whether exhibitors or government officials, to register their attendance. They should record date of arrival, name of hotel and room number, and expected date of departure. This information is essential for the referring of enquiries. The center used for registration is also a convenient place for the exchange of messages. Such arrangements should include any Canadian exhibitor who is participating in the fair on his own.

#### Briefing

##### Reception

172. An idea tried successfully by a few Trade Commissioners is the "briefing reception". The best results can be obtained by inviting all exhibitors and Canadian Government personnel to a cocktail party the evening before the exhibit opens. (Badges showing first as well as surnames aid in identification.) In such surroundings the Trade Commissioner can tactfully establish a few simple rules that must be followed, the most important of which are the arrangement of substitute

mannng and the reference of enquiries in the representatives' absence.

**Exhibitors' kit**

173. An added touch, to demonstrate the importance the Trade Commissioner attaches to the attendance of Canadian or local representatives, is the preparation of a book of information about various features of the exhibit, the post and the city. The visiting Canadian, and likewise the local representative if he is present, will be much impressed with the care taken by the Department to look after their interests.

174. Following is a suggested list of contents:

- General Information for Exhibitors:
  - Information about the trade fair
  - Information about the Canadian exhibit
  - Names and titles of Canadian staff
  - Stenographic services
  - Typewriter rentals
  - Telegraph services
  - Telephones
  - Photographers
  - Restaurants
- Catalogue of Exhibitors: the trade fair booklet.
- List of Exhibitors' Representatives, showing:
  - Name of firm
  - Name of representatives
  - Name of hotel and room number
  - Home phone numbers of Trade and Commerce staff
- List of Embassy or Consulate Officers, all Departments.
- Services of Trade Commissioners: a leaflet published by the Department for some posts.
- Exhibitors' Badges:
  - Trade fair badge
  - Canadian exhibit badge
- Floor Plan of Exhibit.
- Street and Transportation Maps of City.
- "What's on in City?" and other entertainment guides.
- Railway and Airline Transportation Timetables.
- Fact Sheets on Canada (Primarily of interest to local representatives of Canadian participants).

175. The personal touch can be added by introducing the book with an individually-typed letter of welcome.

176. Should "Acco-Press" or other prong fastener binders be unavailable in any territory, they may be ordered in advance from Ottawa. Allow 3 months for delivery and specify color.

**News Sheet**

177. If the scope of the participation is such as to warrant it, thought might be given to the possibility of preparing a brief, mimeographed or typed information sheet for distribution to exhibitors on the Canadian stand. Such a sheet could be attached to a copy of the most recent news Summary from Canada and contain a round-up of comments by exhibitors from the previous day.

**Canvass During Exhibit**

178. As the fair draws to a close, it is desirable for the Trade Commissioner to canvass the representatives of Canadian companies who have been in attendance in order to obtain their assessment of the results of participation. This is difficult information to get. Very few firms will voluntarily disclose what business they have done or are likely to do. Some will, but from the majority the most that can be expected is a general statement on the value of their participation.
179. In assessing the exhibit, the participants should also be encouraged to provide their comments about the effectiveness of the participation as a whole. This frequently brings to light improvements that can be made in the planning stages of subsequent fairs. Canadians in attendance are likely to be more outspoken in this regard than local representatives. One can sympathize with the latter's hesitation in criticizing the exhibit for fear of giving offence. Questions about the direct mail campaign, advertising and similar activities, as well as about the exhibit itself, are all calculated to yield important information. It may be possible to elicit the information desired by holding an informal evening gathering of all the exhibitors and staff just before the close of the fair.

**Diplomatic Privileges**

180. It can be expected that requests to purchase liquor, cigarettes, etc. at diplomatic prices will be received from some of the people who are temporarily associated with Canadian participation in a fair. These requests may come from both foreign nationals and Canadians. The Trade Commissioner might find it advisable to establish, together with the Head of Mission, a practical way of dealing with such requests. All members of the mission should be advised of the decision by the Head of Mission so that a united front is presented.

The Follow-up

181. The follow-up process may require the preparation of a considerable number of individual reports for firms that participated in the exhibit. The promptness and clarity of such reports will be a factor in persuading the company to pursue the leads. It requires continuing interest on the part of the Trade Commissioner to ensure that leads do not die for want of attention. Commodity Officers will be glad to add pressure where necessary.

**POST FAIR EXHIBIT**

182. It is possible that the exhibit, or part of it, would lend itself to display in the window of a local department store. After obtaining clearance from the Exhibition Commission, the Trade Commissioner might invite a senior store executive to inspect the exhibit and offer to lend it to him (all or in part) for a period of a week or so after the close of the fair. If such a display means that there would be additional expenses in the return freight charges, (because of a split shipment) then the companies whose products are displayed must first agree to bear the additional expense. Permission should first be obtained from the local customs authorities to change the conditions under which the exhibit and its contents were originally imported.

OFFICIAL REPORTING

**PARTICIPATION REPORT**

183. A post-fair responsibility, second only to the processing of enquiries, is the preparation of a comprehensive participation report. The information provided by it serves two purposes: to give a complete picture of the impact and results of participation, and to provide guidance in planning future exhibits. New lessons can be learned from each participation and it is important that they be made known to head office. The Trade Commissioner should have no hesitation in reporting clearly why participation was not a success.
184. A pro forma participation report (see Annex "H") is sent to the post 3 weeks before the fair is due to begin. Section 1, "Organization of Exhibit", is completed by the Trade Fairs Abroad Division in Ottawa prior to mailing; this saves the Trade Commissioner the trouble of providing information which is already available in Ottawa and gives him a chance to see what head office expects to happen at the fair. It is naturally subject to amendment in the light of actual events. The Trade Commissioner's special attention is directed to "Suitability of Product Content" in Section 4. Much of the information in the whole of Section 4 might be of interest and value to Trade Commissioners at neighboring posts. When the participation report is complete, the Trade Commissioner should have several copies of Section 4 typed to send to

any of his colleagues in posts that would be interested. Three copies of the complete report should be sent to the Trade Fairs Abroad Division.

185. A useful aid to reporting is a "log book", kept in the exhibit office or the storage room, in which members of the manning staff can write notes of special events, problems or criticisms coming to their attention. It may also be useful, one or two days before the close of the fair, for the Trade Commissioner to obtain a tape recorder and commit to tape while at the exhibit some of his impressions under the various headings of the participation report. Such on-site impressions can be of great assistance when putting together the report in the quiet of one's office.
186. Apart from the use of a tape recorder to make verbal notes for later use in the report, it can be used for recording interviews which will be of use in Ottawa. Informal interviews can be arranged with Canadian representatives manning their displays, visiting notables, enquiring businessmen, and the general public. Such a recording has a real value in Ottawa for it enables members of the Committee on Trade Fairs Abroad and other interested persons to be "transported" to the scene of operations. A better understanding of both problems and reactions can be obtained by those at a distance. If such a tape is received in Ottawa, the Trade Fairs Abroad Division would consider whether an edited version might be suitable for radio broadcast in Canada.

#### REVIEW OF RESULTS

187. Business initiated at an exhibit may not bear fruit for some time and, hence, it will be omitted from the immediate assessment of results. To bring such business to light, it is useful to write to participating firms or their agents 6 to 12 months after the fair to ask if they can report additional results. In certain cases some very interesting figures may be turned up. In order to avoid any embarrassing duplication of a similar approach by Commodity Officers, this phase of the operation could be coordinated through the Trade Fairs Abroad Division. The "Review" should be forwarded to the Division in three copies for attachment to the participation report.

#### CONCLUSION

188. Although the ultimate benefits of a trade fair participation may not be evident for some time after the event, it will be appreciated that the primary objective is the immediate placement of agencies or booking of business. First results must be consistently pursued; market reports on products requiring additional attention should be carefully put together and forwarded to Ottawa as soon after the fair as possible; long-term results should be identified, if possible, with the exhibit.



189. Participation in a trade fair is an exhausting challenge to perseverance and ingenuity. Although solo fairs require the utmost in canny management, all exhibits impose a strain on available resources. They are a lot of work, but the results in the majority of cases testify to the worth of this type of trade promotion.

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*Original 8 March 61*

## COORDINATION SCHEDULE

(NAME OF FAIR)

Step No.	Date	Body to Take Action	Action
1		TFA Div	<p><b>Coordination Meeting – attended by:</b></p> <ul style="list-style-type: none"> <li>a) Chief, TFA Div (Chairman)</li> <li>b) Coordinator</li> <li>c) Ex Comm. Admin Officer</li> <li>d) Chief Designer</li> <li>e) Senior Project Officer</li> <li>f) Director, Tr Pub Br</li> <li>g) Chief, E &amp; AS Div</li> <li>h) Chief, ITR Br Area Div</li> <li>i) Others specially interested</li> </ul> <p style="text-align: right;">} Working Committee</p> <p><b>Should produce minutes stating:</b></p> <ul style="list-style-type: none"> <li>a) Purpose of exhibit</li> <li>b) Audience</li> <li>c) Commercial or institutional</li> <li>d) What story to be told</li> <li>e) Special presentation techniques</li> <li>f) Priority of products and product groups</li> <li>g) Language (s) to be used</li> <li>h) Cost sharing and freight arrangements</li> <li>i) Literature to be produced</li> <li>j) Advertising necessary</li> <li>k) Approval of coordination schedule</li> </ul> <p><b>Copies sent to:</b></p> <ul style="list-style-type: none"> <li>a) All working committee members</li> <li>b) Tr Comm concerned</li> </ul>
2		TFA Div	<p><b>Fair Brochures Ordered</b> – ask Tr Comm to have Fair management send 100 copies of brochures, posters etc., for distribution to exhibitors. (see step 12.e)</p>
3		Coordinator	<p><b>Tentative List of Firms</b> – as a result of Coordination Meeting. (Should include priority for products and product groups.)</p> <p><b>Copies sent to:</b></p> <ul style="list-style-type: none"> <li>a) Ex Comm (2)</li> <li>b) E &amp; AS Div</li> <li>c) TFA Div (2, one for Tr Comm)</li> </ul>

## ABBREVIATIONS

TFA	Trade Fairs Abroad
E & AS	Editorial and Arts Services
ITR	International Trade Relations
Ex Comm	Exhibition Commission
CMA	Canadian Manufacturers' Association
CEA	Canadian Exporters' Association
FP	Financial Post
MT	Financial Times (Montreal)

Step No.	Date	Body to Take Action	Action
4		Ex Comm	Begin Design & Production of Sales Aid -- sales binder and promotional pamphlet, including sketches of space components.
5		Coordinator	Begin Canvass of Firms -- Commodity Officers to determine, without committing Department, what firms interested in exhibiting.
6		Coordinator	Begin Sales Campaign -- (for cost sharing show only).
7		Coordinator	Confirmed List -- should list firms that have confirmed intent to participate, and show: <ol style="list-style-type: none"> <li>a) Name and address of firm</li> <li>b) Name and address of agent (if any)</li> <li>c) Name, number, description of products for display</li> </ol> Copies sent to: <ol style="list-style-type: none"> <li>a) Ex Comm (2)</li> <li>b) E &amp; AS Div</li> <li>c) TFA Div (2, one for Tr Comm)</li> </ol>
8		E & AS Div	Draft Folder Text -- begin draft of info for folder.
9		Coordinator	Info for Folder Text -- begin to collect photos and drawings for folder.
10		Ex Comm	Begin Preliminary Design -- proposed layout
11		TFA Div	Progress Meeting of Working Committee -- to consider: <ol style="list-style-type: none"> <li>a) Designer's layout and plans</li> <li>b) Suggestions of Tr Comm</li> <li>c) If suggested products can be accommodated</li> <li>d) Manning required</li> <li>e) If Black Books required</li> <li>f) Progress of trade fair folder</li> <li>g) Press releases required</li> </ol> Copies of minutes to: <ol style="list-style-type: none"> <li>a) Members of working committee</li> <li>b) Tr Comm concerned</li> </ol>

Step No.	Date	Body to Take Action	Action
12		Coordinator	<p><b>Commitments to Firms</b> – commodity officers write to firms:</p> <ul style="list-style-type: none"> <li>a) Committing Department to accommodate them in exhibit</li> <li>b) Asking them to confirm their intent to participate</li> <li>c) Asking them to advise their local agents of intended participation</li> <li>d) Asking firms to advise Department if any Canadian representative to attend exhibit</li> <li>e) Enclosing brochure and poster supplied by Fair management</li> </ul>
13		Tr Pub Br	<p><b>Publicity Info to Tr Comm</b> – write Tr Comm:</p> <ul style="list-style-type: none"> <li>a) Advertising</li> <li>b) Direct Mail Campaign</li> <li>c) Receptions</li> <li>d) Photographs, etc.</li> </ul> <p>Also advise other posts in the event they wish to do direct mailing.</p>
14		TFA Div	<b>Manning</b> – report to Tr Comm Serv on manning problems.
15		TFA Div Ex Comm	<b>Proposed Exhibit Layout to Tr Comm</b>
16		E & AS Div	<b>Begin Folder Production</b> – including translation.
17		E & AS Div	<b>Begin Press Releases</b> – editorial work and production.
18		Ex Comm	<p><b>Design Meeting of Working Committee</b> – to approve tentative design.</p> <p>Copies of minutes to:</p> <ul style="list-style-type: none"> <li>a) Members of Working Committee</li> <li>b) Tr Comm concerned</li> </ul>
19		Ex Comm	<b>Product Specifications Ready</b> – Designer to forward to Coordinator number, sizes, weights, etc. of products for display.
20		Coordinator	<p><b>Request Products</b> – commodity officers to:</p> <ul style="list-style-type: none"> <li>a) Ask firms for product samples (giving number, specifications, deadline for receiving)</li> </ul>

Step No.	Date	Body to Take Action	Action
			<ul style="list-style-type: none"> <li>b) Ask firms to include packing slip showing values of samples for shipping and customs purposes</li> <li>c) Ask firms for Black Book info including prices</li> <li>d) Ask firms for literature for distribution at exhibit</li> <li>e) Ask firms for post-fair disposition instructions for samples</li> <li>f) Remind firms that insurance of samples is their responsibility</li> <li>g) Request that shipment of samples be prominently marked with name of fair</li> </ul>
21		TFA Div	<b>TFA Comm Approves Design</b>
22		TFA Div Ex Comm	<b>Exhibit Description to Tr Comm</b> – forward word picture and perspective drawing.
23		Coordinator	<b>Begin Black Books</b> – begin to assemble material.
24		Ex Comm	<b>Production Begins</b> – Production Supervisor notifies Coordinator as display panels completed for examination by commodity officers.
25		Ex Comm	<b>Samples Received for Incorporation</b> – into exhibit.
26		Ex Comm	<b>Other Samples Received</b> – that require no special attention.
27		Ex Comm	<b>Exhibit &amp; Folders Shipped</b> – include folders for on site distribution.
28		Coordinator	<b>Black Books Shipped</b> – if delayed within 7 weeks of fair opening, ship air freight.
29		E & AS Div	<b>Folders Shipped</b> – air freight for direct mail campaign. <ul style="list-style-type: none"> <li>a) to exhibit post</li> <li>b) to other selected posts</li> </ul>
30		E & AS Div	<b>Press Releases to Tr Comms</b>
31		Coordinator	<b>Press Releases to Exhibitors</b> – Commodity Officers send complete set plus trade fair folder to each Canadian exhibitor; Tr Pub Br send same thing to trade journals.

Step No.	Date	Body to Take Action	Action
32		Tr Comms	Begin Direct Mail Campaign — at: a) exhibit post b) other selected posts
33		TFA Div	Report Pro Forma to Tr Comm
34		Tr Comm	Exhibit Begins
35		Tr Comm Tr Pub Br	Photos for Canadian News — rush photos of exhibit to Ottawa immediately after fair opening (with captions).
36		Tr Comm	Post-Fair Publicity — submit: a) Comments and photos for Foreign Trade b) Success stories for distribution to CMA, CEA, FP, MT, Can Ch of Com, and selected trade periodicals.
37		Tr Comm	Submit Participation Report — including set of trade enquiries.  Circulation: a) original to TFA Comm members (for Records file) b) carbon copy to Commodity Officers (for office file) c) carbon copy to Ex Comm (for retention)

## WORKING COMMITTEE MEETING

## CHECK LIST

1. Objective
  - does exhibit reflect stated objective?
2. Space
  - enough for proper impression?
  - enough to prevent crowding of products?
3. Products
  - does assigned area reflect relative importance of each product group?
  - identified with name of firm and of local agent
  - incorporate suggestions of Trade Commissioner?
  - have signs to indicate local retailers where products available?
  - adequate instructions for disposition after fair?
  - has designer specified samples?
  - may C.O.'s now order samples?
4. Sampling
  - to be allowed?
  - adequate facilities?
5. Graphic material
  - submitted to Working Committee for approval?
  - is it suitable?
  - adequate captions?
6. Identification
  - is word "Canada" in good taste?
  - used frequently enough?
  - prominent enough?
  - sufficient identification of Trade Information Counter?
  - signs to indicate out-of-way exhibits?
  - name plate for officer-on-duty?
7. Refrigeration
  - facilities required?
  - arrangements made for equipment?
  - what type of cabinet?
8. Other Departments
  - facilities adequate for their staff?
9. Office
  - are furnishings dignified?
  - shipped from Ottawa or rented?
  - if rented, what pieces involved?
  - space adequate for dignified interviews?
  - lighting sufficient?
  - air conditioning?

10. Lounge
- of sufficient size?
  - adequately screened from public?
  - map of Canada included?
  - rack for periodicals?
  - suitable for use by company representatives if in attendance?
11. Junk Room
- separate from but adjacent to office?
  - can it be locked?
  - has it shelves for segregation of literature?
  - has it hooks for coats?
12. Counters
- are there counters with shelving?
  - are length, number, and location consistent with presumed manning?
  - is area behind counters closed to public?
13. Floor
- will it take the materials and equipment to be placed on or affixed to it?
14. Sundry Furnishings
- are there rubber-shod stools with backs?
  - ashtrays?
  - wastebaskets?
  - fans?
15. Maintenance
- arrangements for housecleaning of:
    - a) office
    - b) lounge
    - c) junk room
    - d) stand
    - e) ashtrays and wastebaskets
    - f) straightening literature
  - daily check and refurbishing exhibit material, signs, photos?
  - arrangements for stocking counters and displays with literature?
16. Previous Experience
- was report on last exhibit consulted for points based on experience?
17. Next Meeting
- date for next Working Committee meeting?
  - for TFA approval?



## SAMPLES DISPLAY - INFORMATION REPORT

### A. MARKET POSSIBILITIES

- 1) Total imports into country
- 2) Chief Canadian exports to country
- 3) Chief United States exports to country
- 4) Import restrictions
  - a) Licencing and quotas
  - b) Tariffs
  - c) Foreign exchange
- 5) Business conditions
- 6) Marketable commodities and services

### B. PURPOSE OF EXHIBIT

### C. CONTENT

Suggested products and suppliers

### D. AUDIENCE

- 1) Display open to
  - a) Business visitors
  - b) General public
  - c) Both
- 2) Numbers of visitors expected
- 3) Method of invitation
- 4) Entertainment
  - a) Formal reception
    - i) Number of guests
    - ii) Location
    - iii) Cost
  - b) Individual entertainment of business visitors
- 5) Film showings
  - a) Facilities
    - i) Space available
    - ii) Projection equipment
    - iii) Seating capacity
  - b) Films desired
    - i) Trade
    - ii) General information

### E. SITE

- 1) Center(s) in which Display to be held
- 2) Possible sites, commenting on each as follows:
  - a) Location, e.g. office, warehouse, auto showroom, etc.
  - b) Rental charges, if any

- c) Nature of building
- d) Physical details
  - i) Size and shape (supply floor plan)
  - ii) Height of ceiling
  - iii) Type of floor
  - iv) Floor loading capacity
  - v) Size of door and window openings (to permit entry of exhibit materials)
  - vi) Lighting
  - vii) Location of electrical outlets (show on floor plan)
- e) Technical details
  - i) Electrical power: frequency, single phase voltage, three phase voltage, maximum load,
  - ii) Availability of water, gas, equipment for compressed air
  - f) Need for modest general decoration, e.g. drapes, false ceiling, etc.
  - g) Need for distinctive Canadian decorative materials, e.g. "Canada" signs, coats-of-arms, flags, etc.
  - h) Time available to assemble and dismantle display
  - i) Restrictions on items that might be considered hazardous, e.g. radioactive or inflammable materials and gases

3. Description of area for each center

- a) Accessibility to public
  - i) Location in city
  - ii) Transportation facilities
- b) Parking facilities at site
- c) Hotel accommodation in city

F. TIMING

- 1) Best time of year, commenting on temperature, rainfall, winds, road conditions, etc.
- 2) Duration, e.g. number of days, open Saturdays, Sundays, etc.
- 3) Daily hours for
  - a) Public
  - b) Business visitors

G. PUBLICITY AND ADVERTISING

- 1) Language(s) to be used
- 2) Trade literature and catalogues needed for
  - a) Direct mailing
  - b) Handout on site
- 3) Other literature desired
- 4) Paid advertising desired (indicate size of ad and rates for each publication or medium)
  - a) Newspapers
  - b) Popular periodicals
  - c) Trade periodicals
  - d) Radio
  - e) Television
  - f) Cinema

- 5) Counter cards and posters
- 6) Stickers for correspondence
- 7) Press releases
  - a) Number of publications on distribution list
  - b) Topics of interest
- 8) Direct mail campaign
  - a) Probable size of mailing list
  - b) Facilities for reproduction
  - c) Cost
- 9) Other publicity measures

**H. COOPERATION WITH LOCAL AGENTS (if established products shown)**

- 1) Arrangements for staffing
- 2) Possibility of cooperative advertising

**I. MANNING**

- 1) Adequacy of local office staff
- 2) Prevailing wage rates if need to hire staff
- 3) Support from other sections of mission

**J. OPERATION AND MAINTENANCE OF DISPLAY**

- 1) Customs formalities (for both samples and display materials)
  - a) On arrival
  - b) On re-export
- 2) Security arrangements
- 3) Cleaning services
  - a) Overnight
  - b) While Display operating
- 4) Shipping arrangements
  - a) Shipping time from Ottawa
  - b) Best routing
  - c) Transfer port to site
  - d) Onward shipment (availability of space)
  - e) Port conditions
  - f) Necessary documentation for each center
  - g) Restrictions on size, weight, shape
- 5) Storage
  - a) Before exhibit
  - b) Of packing material during display
  - c) After exhibit
- 6) Freight charges
  - a) Ottawa to port
  - b) Port to site
  - c) Site to site (if more than one display)

- 7) Disposal of exhibit
  - a) Onward delivery for redisplay
  - b) Outright sale
  - c) Turn over to agents
  - d) Return to Ottawa

**K. GENERAL COMMENTS**

- 1) Practicability
- 2) Experience of other countries
- 3) Other comments

## TRADE FAIR INFORMATION REPORT

This report is to be used when there has been no recent (three years) Canadian exhibit at a fair

1. **Recommendations and Comments**
  - (1) Recommendation for participation
  - (2) Other countries likely to participate
  - (3) Objective of Canadian participation
    - (a) Commercial
    - (b) Other (political, immigration, tourist, etc.)
  - (4) Recommendations for
    - (a) Size and location of space
    - (b) Theme
    - (c) Products to be shown
  - (5) Other comments
2. **Nature of Fair**
  - (1) National or international
  - (2) Sponsor – government or private interests
3. **Period of Fair**
  - (1) Frequency – annual, biennial, irregular, etc.
  - (2) Dates (if exact dates unknown, give approximate)
4. **Type of Exhibits**
  - (1) Vertical or horizontal
  - (2) Specify trade classifications
5. **Exhibition Space**
  - (1) Location of site
  - (2) Size of site
  - (3) Nature of buildings and outdoor space
  - (4) Location of national exhibits including restrictions on location
    - (a) Pavilions
    - (b) National exhibit halls, e.g. Hall of Nations
    - (c) With industry classifications
  - (5) Special facilities for exhibitors
  - (6) Cost of space
6. **Attendance (Information for most recent typical year)**
  - (1) Hours of admission
    - (a) General public
    - (b) Business visitors

- (2) Admission charges
- (3) Number of exhibitors (by country if possible)
- (4) Number of visitors (by country if possible)
  - (a) General public
  - (b) Business visitors

**7. History and Special Notes**

- (1) General experience of this fair
- (2) When inaugurated
- (3) Rating in comparison with other fairs known to you
  - (a) In same country
  - (b) Elsewhere (including the C.I.T.F.)
- (4) Management
  - (a) Name and address
  - (b) Comment on their reliability and reputation

**8. Publicity and Advertising**

- (1) Forward copies of
  - (a) Catalogues
  - (b) Available promotional literature
- (2) Advertising recommended
  - (a) Media to be used
  - (b) Cost
  - (c) Size of space recommended, etc.
- (3) Other publicity measures, -- direct mailing campaign, etc.

*In Triplicate.*

## INFORMATION REPORT (SOLO FAIR)

### I. GENERAL MARKET INFORMATION.

- 1) Total imports into country.
- 2) Chief Canadian exports to country.
- 3) Chief United States exports to country.
- 4) Import restrictions
  - a) Licencing and quotas
  - b) Tariffs
  - c) Foreign exchange.
- 5) Business conditions.
- 6) Marketable commodities and services (not necessarily restricted to a solo fair).

### II. SPECIFIC PROPOSAL.

#### A. PURPOSE OF FAIR.

e.g. to obtain agents, to extend distribution of established lines, to test the consumer market, to educate the public.

#### B. CONTENT.

Suggested products and suppliers (suited to promotion in a solo fair).

#### C. AUDIENCE.

- 1) Fair open to
  - a) Business visitors
  - b) General Public
  - c) Both
- 2) Number of visitors expected.

#### D. SITE

- 1) City or cities recommended,
- 2) Possible sites, commenting on each as follows:
  - a) Location, e.g. fair grounds, sports club, public park, exhibition hall, hotel ballroom, etc.
  - b) Approximate rental charges.
  - c) Description of building or site.
  - d) Technical details
    - i) Electrical power (frequency, single phase voltage, three-phase voltage, maximum load).
    - ii) Availability of water, gas, equipment for compressed air.
  - e) Restrictions on items that might be considered hazardous, e.g. radioactive or inflammable materials and gases.

- f) Accessibility to public
  - i) Location in city
  - ii) Transportation facilities
- g) Parking facilities at site
- h) Hotel accommodation in city
- i) Customs formalities (for both samples and display materials)
  - i) On arrival
  - ii) On re-export
- j) Shipping arrangements between sites (if more than one contemplated.)

**E. TIMING.**

- 1) Best time of year, commenting on rainfall, temperature, road conditions, winds, etc.
- 2) Duration, e.g. number of days, open Saturdays, Sundays, etc.
- 3) Daily hours for
  - a) Public
  - b) Business visitors

**F. PUBLICITY AND ADVERTISING.**

- 1) Language(s) to be used.
- 2) Trade literature and catalogues needed for
  - a) Direct mailing
  - b) Handout on site
- 3) Other literature desired.
- 4) Paid advertising desired (indicate size of ad and rates for each publication or medium).
  - a) Newspapers
  - b) Popular periodicals
  - c) Trade periodicals
  - d) Radio
  - e) Television
  - f) Cinema
- 5) Counter cards and posters.
- 6) Stickers for correspondence.
- 7) Press releases
  - a) Number of publications on distribution list.
  - b) Topics of interest.
- 8) Possibility of special newspaper supplements.
- 9) Direct mail campaign.
  - a) Probable size of mailing list.
  - b) Facilities for reproduction.
  - c) Cost.
- 10) Possibility of co-operative advertising between agents of Canadian firms and the Department.
- 11) Other publicity measures, e.g. speeches, etc.



**G. SUPPORTING ACTIVITIES.**

## 1) On site

- a) Film showing
  - i) Purpose (trade promotion or entertainment)
  - ii) Facilities, e.g. size and location of cinema, projection equipment available, seating capacity, etc.
- b) Hospitality
  - i) Formal reception, e.g. number of guests, location, cost, etc.
  - ii) Individual entertainment of business visitors.
- c) Fashion show
  - i) Purpose (trade promotion, entertainment, publicity).
  - ii) Facilities, e.g. size and location, garments to be shown, availability of professional organizer, commentator, models, etc.
- d) Stage show
  - i) Type of show
  - ii) Availability of talent (local or Canadian)
  - iii) Cost
- e) Restaurant and refreshment booth
  - i) Size and type recommended
  - ii) Availability of caterers.

## 2) Off site

- a) Department store and other co-operative displays.
- b) Art and handicraft exhibits
- c) Performances by musicians and musical groups, etc.
- d) Special luncheons and receptions
- e) Canadian trade mission
- f) Canadian naval visit, etc.

**H. STAFF.**

- 1) Adequacy of local office staff
  - a) Prior to and following fair
  - b) During fair
- 2) Prevailing wage rates if need to hire staff.
- 3) Support expected from other sections of mission

**I. GENERAL COMMENTS.**

- 1) Practicability.
- 2) Experience of other countries.
- 3) Other comments.

**TRADE ENQUIRY FORM**

**NAME OF REPRESENTATIVE:**

**TITLE OF REPRESENTATIVE:**

**NAME OF FIRM:**

**TELEPHONE:**

**BANK REFERENCES:**

**PRODUCT(S):**

**ACTION TAKEN (IF ANY):**

**SUBSEQUENT ACTION REQUIRED (IF ANY):**

**INTERVIEWED BY:**

**DATE:**

## TRADE SHOW TECHNICAL CATALOGUE SHEET

Name and address of firm:

Products on display:

Cable address:

Names of officers of firm including executive in charge of export:

Representation: a) names of agents in United States.

b) if seeking agency, specify type desired.

Disposition of material on display at conclusion of fair:

Brief history of firm and description of operations:

Description of products made for export:

(Use separate sheet and attach appropriate literature, specifications, etc.)

## TRADE FAIR PARTICIPATION REPORT

### 1. Organization of Exhibit:

- 1) Location
- 2) Size
- 3) General character
- 4) Manning – Trade and Commerce and other Departments
- 5) Cinema – capacity, etc.
- 6) List of Canadian firms participating (Appendix)

### 2. Operation of Exhibit:

- 1) Customs formalities
- 2) Security arrangements
- 3) Accessibility of exhibit to public – if not, why not?
- 4) Difficulties or problems encountered, e.g. manning, etc.

### 3. Effect of Official Participation:

- 1) Effectiveness of theme and design
- 2) Comparison with other national exhibits
- 3) Reception
  - a) Type and location
  - b) Number of guests
  - c) Effectiveness
- 4) Cinema
  - a) Attendance
  - b) Films shown
  - c) Effectiveness
- 5) Impact on
  - a) General public
  - b) Business visitors
  - c) Local government officials
  - d) Participants
- 6) Comments, if useful, by
  - a) Fair management
  - b) Local government officials
  - c) Business visitors
  - d) General public
  - e) Canadian visitors
  - f) Canadian participants and/or their agents
  - g) Press

**4. Results:**

- 1) Trade enquiries
  - a) Total enquiries for export from Canada
    - i) Originating in your territory
    - ii) Originating elsewhere
  - b) Breakdown of enquiries for export from Canada by name of Canadian exhibitor
  - c) Total enquiries for import into Canada
  - d) Industrial development enquiries
  - e) Others, e.g. tourist, immigration, general information, etc.
- 2) Attendance of representatives or agents of Canadian firms
  - a) Number and names of those in attendance
  - b) Comments on adequacy or effectiveness of this attendance
- 3) Suitability of product content
  - a) List those items unsuitable because of:
    - i) Controls
    - ii) Price
    - iii) Quality
    - iv) Delivery time
    - v) Modifications required (describe)
    - vi) Local taste
    - vii) Non-Canadian content
- 4) Representations established
- 5) Actual sales made

**5. Private Canadian Exhibits:**

- 1) Names of exhibitors (Canadian company and local agents) and whether Canadian goods were shown exclusively
- 2) Manning of stands - Canadian or local agents
- 3) Results achieved
- 4) Appearance and effectiveness of exhibits

**6. Publicity and Advertising:**

- 1) Canadian literature distributed
  - a) Estimated quantities distributed by title
  - b) Comment on value of material for this purpose
- 2) Paid advertising: comment on its use
  - a) For this fair
  - b) For future fair, if recommended, giving details of media to be used, cost, size of space, etc.
- 3) Cooperation of local agents
  - a) Special measures to obtain cooperation of local agents
  - b) Advertising by local agent or Canadian principal

- 4) Press releases and news stories
  - a) Publications to which publicity material distributed
  - b) Describe actual press coverage, with tear sheets where possible
- 5) Other publicity measures, e.g. direct mail campaign, etc.

**7. Attendance at Trade Fair:**

- 1) Number of exhibitors (by country, if possible)
- 2) Number of visitors (by country, if possible)
  - a) General public
  - b) Business visitors

**8. Recommendations:**

- 1) Recommendation for future participation
- 2) Reasons for participation
  - a) Commercial
  - b) Other, e.g. political, immigration, tourist, etc.
- 3) Recommendations for
  - a) Size and location of space
  - b) Product groups
- 4) Recommendation for reception
  - a) Type and location
  - b) Size
- 5) Practicability of "cost sharing"

**9. Comments:**

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Storage  
CA1 EA163 51675 ENG  
Trade Commissioner Service guidance  
manual  
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