Taking it on the Road

Best Practices in Regional and International Events

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University of Rochester

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Chair, AEP
CEO, The Special Event Company

Topics to Explore

- Best practices for regional and international events
- How to keep the campus alive
- Logistics in working off campus
- Working with vendors from a distance
- Engaging your audience with continuity
- Keep consistency in your message with geographical and cultural diversity
- Things you should know when working off-shore

Why is this important?

- We live in a global community
- Your alumni base are very different culturally
- Your donor base is on longer just on your doorstep
    - Regional, national or international
- Engaging your audience takes higher skill levels than ever before
    - Part psychologist, part planner!

- Expected to know what and how to deliver programs at a distance
- Keeping brand and message consistency on the road takes expertize
- Internal stakeholders, from President to Development Director can be unforgiving when arrangements are not perfect for them
- There are big liabilities to consider when working offshore

Why does this matter?

IT WILL ALWAYS BE YOUR FAULT

IF YOU DON'T SEE

THE DEVELOMENT RETURN

OR R.O.I

FROM THE PROGRAM!

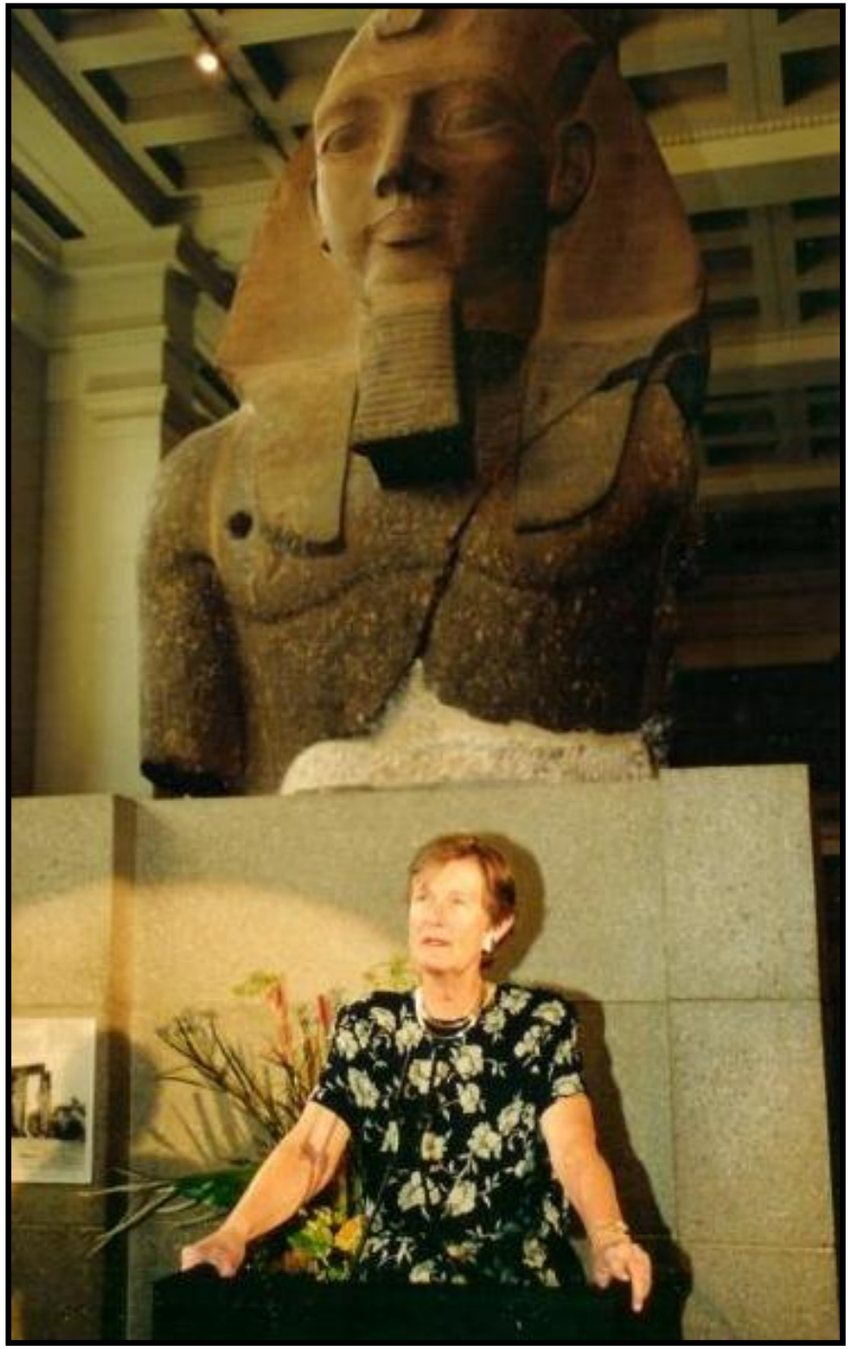
LEVERAGING RELATIONSHIPS IN DIFFERENT REGIONS TO DELIVER UNIQUE EXPERIENCES

- Harder when you don’t know the area
- Find local resources and a don’t be afraid to ask.
- Different cultures are far more acceptable to you being up front with your requests!

CAMPAIGN LAUNCH
FOR
EUROPEAN ALUMNI AND DONORS

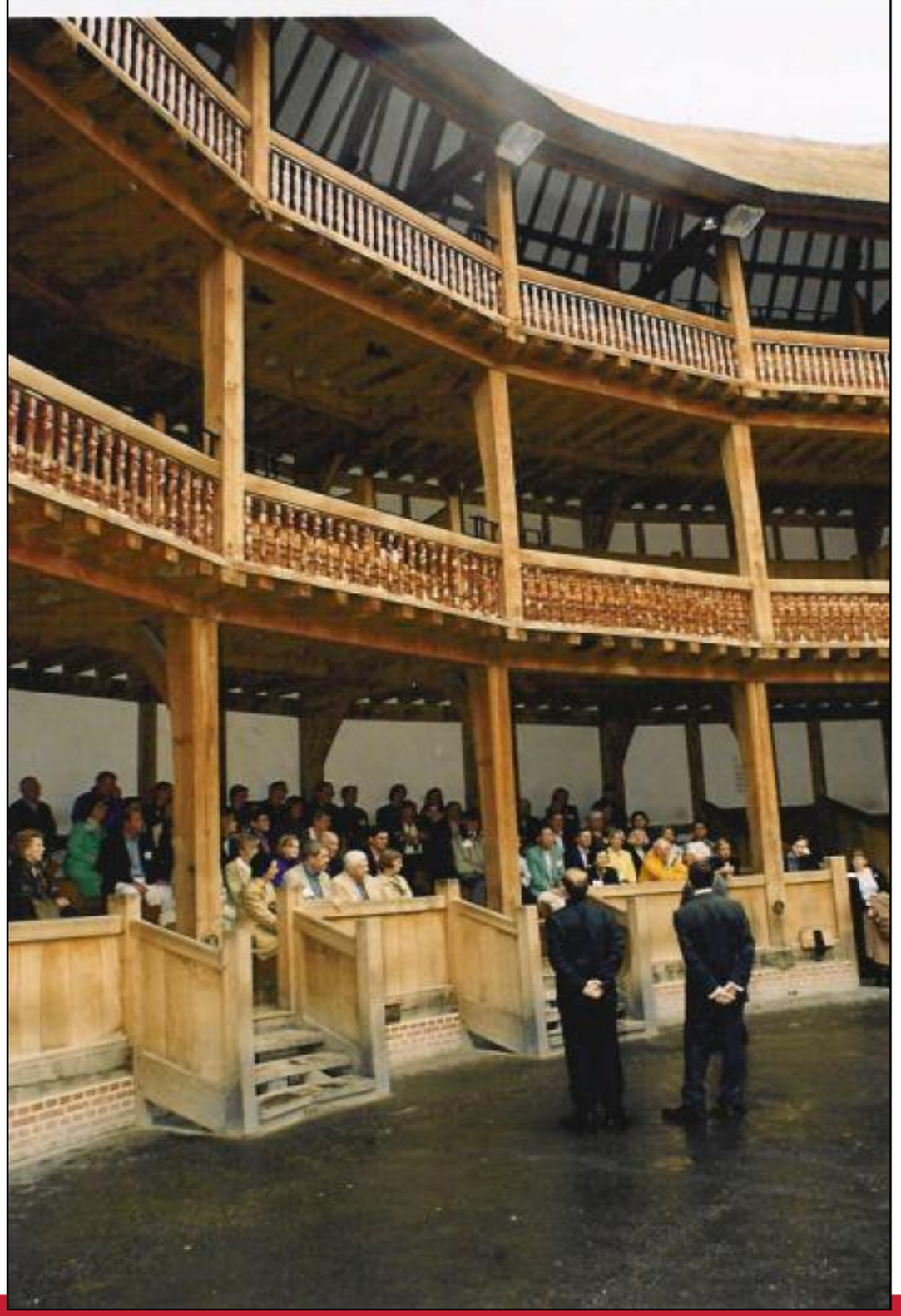
4 DAYS IN LONDON

THE EGYPTIAN GALLERY AT THE BRITISH MUSEUM



AMERICAN FRIENDS *of the* BRITISH MUSEUM

The Elgin Marbles



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RHS Chelsea Flower Show

WEDGWOOD

LEADS FROM MAJOR WEST END MUSICALS

A Royal Tour for Duke

Duke University offers a top-flight special event for top donors

BY LISA HURLEY

Saying thank-you to very generous people demands a very special event. That's what Duke University created for its major donors.

Duke, located in Durham, N.C., is in the midst of a major capital campaign, with the goal of raising $1.5 billion by 2003.

To thank major donors, the university development director of special events and programs, Carolyn Ent, developed a three-day "sabbatical" in London in May. "We wanted our donors to feel special, to enjoy themselves and to feel close to the university," she explains.

The impetus for the event was an invitation to visit the official house of the American ambassador to the United Kingdom, Philip Lader, a Duke alumnus, class of 1966. "We developed the event from there," Ent reports.

Dinner With the Ambassador

Appetizer

Tomato and Oregano Tart with Red Onion and Green Olive Salad

•

Entree

Baked Sea Bass on Saffron Mash with a Confit of Fennel dressed with Coriander, Tomato Concasse and Lime

•

Dessert

Rhubarb Crumble Parfait with Poached Rhubarb Pieces topped with a Crumble Crust and Dried Sweet Rhubarb

Coffee and Chocolates

On the town: Duke donors at a private reception at the British Museum (top, left); Duke's Carolyn Ent (above left) and planner Sally Webb greet Ambassador Philip Lader.

GO LOCAL

Although the ambassador had a close link to Duke, Ent quickly realized she needed a local contact to develop the London visit. She turned to Sally Webb, managing director of The Special Event Co. in London, after learning about Webb's company through the trade show The Special Event 2000, sponsored by *Special Events Magazine*. "We wanted to use venues that had a certain exclusivity to them," Ent says.

Webb and her company developed a three-day trip for the 80 guests. Stops included an Egyptian-themed reception at the Egyptian sculpture gallery in the British Museum, Shakespeare's Globe Theatre, lunch at the Chelsea Flower Show and dinner at Winfield House, the ambassador's home.

THAT SPECIAL TOUCH

The major challenge of the event was creating an engaging tour for such an affluent, educated group. "We wanted to do something with an educational value to it so that there was more to gain than just going along and having a cocktail party," Webb says.

To meet this challenge, the events featured special connections to Duke. For example, a Duke drama professor addressed the group during the visit to the Globe, and a Duke lecturer arranged for a troupe of West End performers to sing show tunes after dinner at Winfield House.

Ent and Webb also offered personalized gifts throughout the tour, including embossed leather folders containing the itinerary, Globe souvenir brochures, and inscribed alms dishes and cufflinks from premier British jeweler Asprey & Garrard at the ambassador's dinner.

And the band played on: A tent and band music keep guests' spirits up during a downpour.

SIDESTEPPING SNAFUS

The organizers had to cope with the unexpected. The mercurial English weather brought a downpour during the flower show visit. "Fortunately, we had a private marquee for the group, and a traditional brass band entertained them inside," Webb says.

One force was even more powerfu than the weather—politics. The day c the dinner at the ambassador's house U.S. Secretary of State Madelin Albright made an unscheduled visit t Ambassador Lader. The catering com pany—Moving Venue Caterers c London—was barred from setup c the venue for three hours.

The event was a success, Web says, because of the trust placed in he company. "Our client had to have huge sense of belief in us," she say "It wasn't easy for her to pop over fo a site visit."

Duke University, University Development
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Durham, NC 27708
919/681-0471

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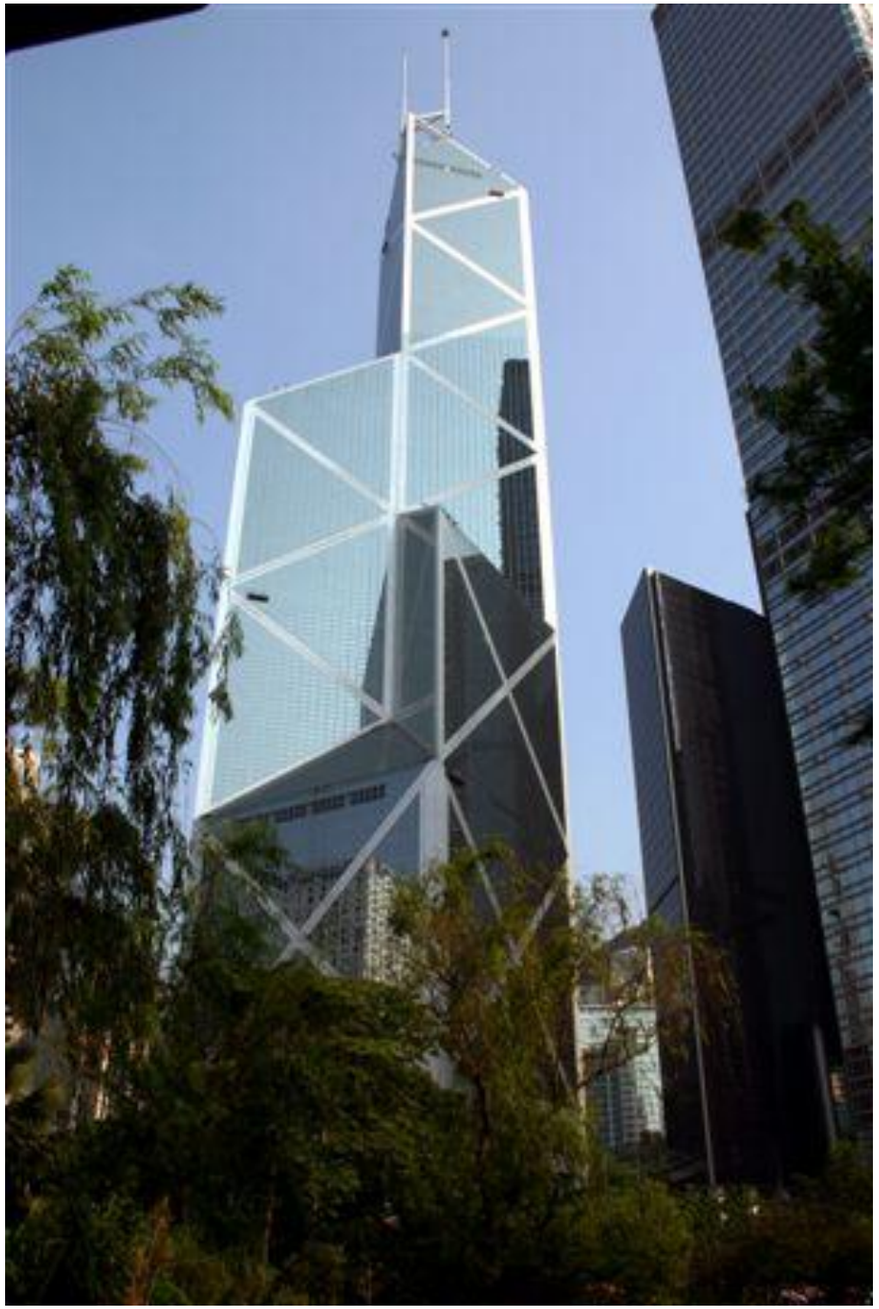
12a The Circle, Queen Elizabeth St.
London SE1 2JE, United Kingdom
+44 171 357 6081
E-mail: specialeventco@btinternet.com

More Information? Circle 632 on reply card.

BANK OF CHINA BUILDING



DR VICTOR FUNG,

LI & FUNG TRADING CO.

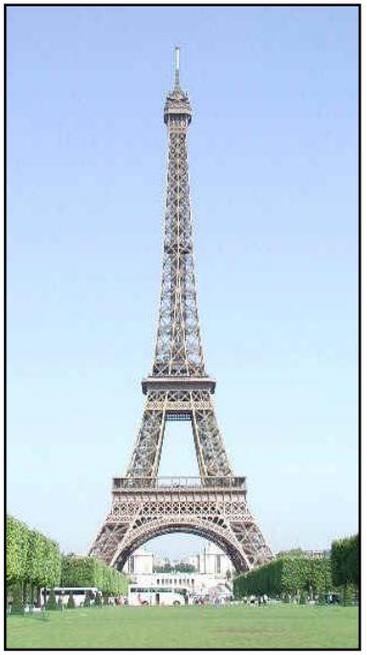
HOME OF US CONSUL GENERAL, HONG KONG

Duke MBA International Retreat PARIS 2002 june 21-23

MME. ANNE HIDALGO

FIRST MAYOR OF PARIS

WELCOME
TO THE
Duke MBA
International
Retreat PARIS
2007
June 21-23



CONTROLLING MESSAGE DELIVERY

CONTINUITY IN BRANDING

Duke MBA
International
Conference GENEVA
2003
July 18-20

Duke MBA
International
Retreat LONDON
2001
June 8-10

Duke MBA
International
Retreat HONG KONG
2004
may 21-23

a national conversatio
Summit on the National Academy of Engineering
GRAND CHALLENGES
USC
Olin College
Duke

face the challenge
ENERGY AND THE ENVIRONMENT
F. Emil Jacobs VP of Research and Development
ExxonMobil Research
Robert H. Socolow Professor
Princeton University
Lincoln Pratson Professor
Duke University
A. Paul Alivisatos Interim Laboratory Director
Lawrence Berkeley National Laboratory

DEVELOP CARBON SEQUESTRATION METHODS

MANAGE THE NITROGEN CYCLE

- Produce brand and message guidelines document

- Put your brand managers hat on and list a definitive display guide for your
  - Logo
  - Slogan
  - Signage
  - Donor recognition
  - Sponsor recognition

USC University of
Southern Californ

Tell me,
Show me,
derstand

USC University of Southern California

RISK MANAGEMENT

- Adequate internal resources and support for you to plan the event effectively
- Many additional risk factors to analyze and assess for programs involving travel
- Produce a comprehensive **Risk Assessment Document**

HKong
DUKE
THE FUQUA
SCHOOL
OF BUSINESS
Duke MBA
International
Review

AEP
ACADEMIC EVENT PROFESSIONAL

2245 1516

AEP
ACADEMIC EVENT PROFESSIONAL

16 April 0600GMT
20 – 30,000 ft
Scope of ash
15 April 0600GMT
ICELAND
Eyjafjallajoekull Volcano
NORWAY
FINLAND
SWEDEN
UNITED KINGDOM
SOURCE: Met Office

1020 AMSTERDAM KL 1230 AF 8230 CANCELLED
1025 BORDEAUX AF 7622 AZ 3642 CANCELLED
1025 MARSEILLE AF 7662 DL 8362 CANCELLED
1025 NICE AF 7702 MK 9086 CANCELLED
1025 TOULOUSE AF 7782 DL 8582 CANCELLED
1025 DUBLIN EI 521 1 DELAYED
1025 VIENNA OS 412 AF 2638 CANCELLED
1025 MALAGA UX 1034 AF 2630 CANCELLED
1030 NEW YORK-JFK AF 012 DL 8654 CANCELLED
1030 SEATTLE 306 DL 8628
1030 SAO PAULO 456
1030 HOUSTON DL 8657
1030 CHICAGO DL 8494
Horaire Time
Destinations Destinations
Vol light

theguardian

Tourism fears as heatwave sparks fires across Greece

Helena Smith in Athens
The Guardian, Wednesday 25 July 2007

Greek firefighters were last night battling blazes that raged uncontrollably, threatening houses and hotels in Kefalonia, villages in the Peloponnese, and large parts of the country's northern border areas. Tinderbox conditions triggered by temperatures that yesterday hit 45C (113F) in the shade in Athens - the hottest day of the year in the capital - were the spark for most of the blazes, according to authorities. But firefighters yesterday were also confronted by blazes that swept across the frontiers that Greece shares with Albania and Macedonia.

AEP
ACADEMIC EVENT PROFESSIONAL

HELPFUL HINTS

- Within contracts, In addition to the right to cancel through Force Majeure, add the provision to cancel with refund in the event that the area is placed on the US Department Advisory List.
- Event Cancellation Insurance – often worth the gamble if costs cannot recovered through contracts.
- Check General Opening Times – Frequent Sunday Closing
- Tax Refunds – works differently outside of the US and is reclaimable.

- The US is almost the only country, which uses 8½ x 11 as standard. A4 paper is the International paper size, which measures 210 x 297 millimeters. It is very difficult to buy US standard size internationally.
- Take a three ringed hole punch. Most international hole punches are 2 or 4 ringed
- On registration forms, add ‘name to be printed on badge line’ Asian names are often listed by last name first.
- List all measurements and distances in metric, not imperial. US, Liberia, Burma (and some UK) only countries still using miles, yards, feet, inches and pounds
- Offer gluten free menu options in Asia

INTERNATIONAL MARKETING MATERIALS

- Calendar dates: 12/1/2013 means January 12 not December 1 internationally

- Toll Free 800 or 866 numbers should not be used. They are sometimes inaccessible and never free to international callers

- Leave extra space for addresses and include Province/County and Postcode/Zip on address lines and country code in telephone numbers

UNIVERSITY of ROCHESTER

Taking it on the Road – Best Practices in Regional and International Events

Becky Wehle

Executive Director of Donor Relations

Best Format for Regional Events

- Know the Region
  - What are the demographics of your alumni/parent/friend population? Age, location, school affinity, occupation
  - What locations would be a draw? Are they easy to get to and park at?
  - What “rock stars” do you have in the region already who you could tap into?
  - Use knowledge of volunteers who live there and staff who regularly travel there

Best Format for Regional Events

- What we like to include:
  - Bring campus to them – President/Deans, students, faculty, images from campus
  - Perks for top donors
  - A role for our key volunteers
  - Educational/life-long learning component
  - Something guests can't get on their own
  - Shorter program with time for networking
  - The chance to build personal connections, especially amongst top donors and prospects

How to Plan Long-Distance

- Use site-selection companies – they do the work for you!
- Get help from volunteers who live there and staff who regularly travel there - ideas/access, site visits
- Do site visits when you travel
- Use Web and listserv resources
  - ADRP & Charity Channel Listserv
  - Biz Bash
  - Travel magazine “Top 100” lists

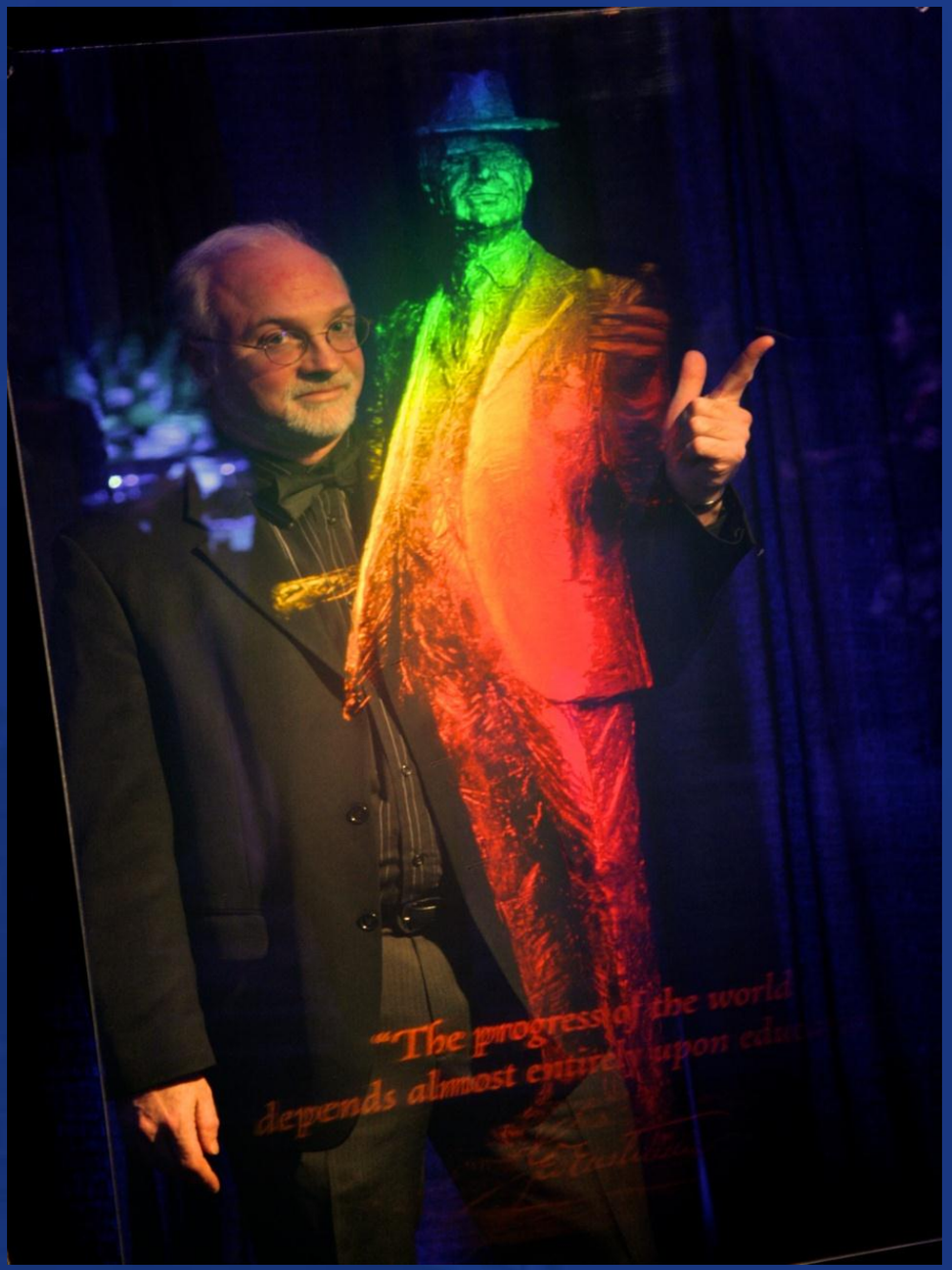
How to Plan Long-Distance

- Build relationships with vendors
- For big events, take your most trusted vendors on the road with you
- Use an event production company to help you with an event template that you can then reproduce
- Standardize as much as you can – briefings for President and Deans, registration process, packing lists, reminder e-mails

Case Studies

Campaign Kick-off in San Francisco

LEARN
DISCOVER
HEAL


"The progress of the world
depends almost entirely upon edu

Case Studies

Campaign Kick-off in Chicago

1850
MELIORA
UNIVERSITY of
ROCHESTER

Case Studies

George Eastman Circle Dinner in New York – Gotham Hall with Maureen Dowd

GEORGE
EASTMAN
CIRCLE
UNIVERSITY OF
ROCHESTER