DCVB SERVICES STRATEGY

I Convention Service Goals and Objectives
1. Mission Statement 2
2. Contributions to Bureau Objectives 3

II Convention Services Responsibilities
1. Ongoing routine activities 4
2. List of Duties – A basic daily/weekly/monthly overview 4
3. Convention Services Packets 6
4. Service Request Form 7
5. Service Tactics – Conventions, Meetings and Events 8
6. Convention Services Reports 12
7. Monthly PI Information 13
8. Monthly Services 3P Reports 14
9. Convention Services Exports for Packets and Post Letters 15
10. Hotel Reporting Process 16
11. Sales/Service D3K Data Entry Instructions 16
12. Convention Services Post Survey Report 18

III Services Provided for Meetings and Conventions
1. Registration/Information Assistance 19
2. Collateral Distribution – guidelines and pricing 21
3. Enhanced Services 23
4. Name Badge Preparation (Excel) 24
5. Dining Options 25
6. Information for Donating Food to Community Organizations 27
7. Food Donation Form 28
8. Housing Bureau 29
9. Banners 30
10. Community / Civic Leader Welcome 34
11. Kiosks 35
12. Transportation Request for Proposals 36
13. Voice Mail Scripting for City-Wide/Large Events 36

IV CONVENTION SERVICES DIRECTORY
1. Instructions 37
2. Defining Categories 37
3. Checking for Other Organizations for Inclusion in CSD 38
4. Printing the CSD. 39

V MINT (DMAI) 40
**Mission Statement**

**PURPOSE:**
The Durham Convention & Visitors Bureau (DCVB) is a not-for-profit, umbrella partnership formed by local government and the visitor industry to attract and serve visitors to the City and County of Durham.

**MAJOR GOAL:**
To secure the social, cultural and economic benefits of visitors for Durham, including expenditures, jobs, personal income, purchasing power and tax receipts.

**OBJECTIVES:**

1. **Generating positive awareness** of Durham as a destination for pleasure and business visitors.
2. **Stimulating interest and desire** in groups and individuals to visit Durham.
3. **Increasing the extent and length of stay** of visitors to Durham.
4. **Providing a liaison** between visitors and the facilities, services, events, activities, agencies and organizations that serve and satisfy them.
5. **Developing market research and target descriptions** of existing and prospective visitors to guide and measure DCVB marketing activities and the Durham visitor industry.
6. **Generating positive community awareness** of Durham visitors and providing opportunities for community support and participation.
7. **Generating a vehicle to merge resources** from private business, government agencies, non-profit organizations and individuals into a cohesive, community-wide effort to market Durham as a visitor destination.
Contribution to Bureau Objectives

- To generate positive awareness of Durham as a meeting and group tour destination.
- To stimulate interest and desire in groups to visit Durham.
- To provide a liaison through customer service between meeting and tour planners and the Durham features and organizations that serve and satisfy them.
- To provide a vehicle to merge resources from private business, government agencies, non-profit organizations and individuals into a cohesive, community-wide effort for Durham as a visitor destination.

Structure & Approach

The Convention Services Department is dedicated to developing and providing a comprehensive convention services program.

The approach to providing convention services:

- To obtain contact information on all groups planning to meet in Durham.
- To offer community services to all groups, regardless of size, meeting in Durham.
- To provide each contact with a convention services directory and an explanation of all available destination services.
- To provide convention services, as requested.
- To follow up with planners after their event and gather information necessary for reporting and issue an invitation to return.
- To traffic all leads for new business to group sales.

In order to serve as a resource for assisting visitors and sectors within the Durham community and to increase the economic impact of groups meeting in the community, DCVB will incorporate local businesses in the rendering of convention services.

End Result

- To satisfy all service needs for groups meeting in Durham.
- To project a unified destination image.
- To reinforce the importance of the customer to the community.
- To link planners/delegates with local services.
- To build long-term selling relationships.
- To spur economic growth in the services sectors of the local economy.
Ongoing Routine Activities

- Provide destination marketing services, such as attendance promotion, inquiries for quantities of brochures and other literature, name badge preparation, registration assistance, welcome/information assistance, housing bureau, etc.
- Act as liaison between meeting planners, hotels and service providers.
- Fulfill any reasonable request of groups for productive and successful meetings.
- Implement service strategy.
- Meet service goals set by the division.
- Manage service collateral counts/stock.
- Set up and maintain the Housing Service.
- Manage service database, including meeting information reported by hotels.
- Maintain Service reports.
- Assist in services tools development.
- Maintain stock of collateral in information kiosks.
- Manage inventory of generic and custom banners.
- Solicit ADA and other service information upgrades, as needed.
- Establish/maintain familiarization with all Durham service providers.
- Provide coordination of local organizing committees (LOC) as needed.

A basic daily overview:

1) **Answer Service Calls.**
   When a meeting planner calls regarding a meeting and has not already spoken with another Sales Manager, ask for answers to the questions on the following services request form and maintain a notebook you create specifically designated to new meetings. You will need this information later when you enter the new meeting into D3K.

2) **Enter information you have received from planners, hotels or other contacts in D3K.**
   Before entering Meeting information, check to make sure that Meeting has not already been entered by another manager; sometimes meetings have more than one meeting planner and one of them has already spoken with DCVB. Sometimes the meeting is a repeat meeting, i.e.: it took place last year and required DCVB services last year. In these cases, the pertinent meeting information has usually already been entered in D3K. Check to make sure that the services about which you discussed with the meeting planner have been entered correctly and if not, enter them.

3) **Prepare Collateral Pick-Ups**
   Organize maps, visitors guides, pens and any other DCVB “giveaways” that the client may want to pass out for a meeting. Organizing collateral pick-ups involves entering the amounts into the excel form & sending an email to Jonathan. Once this is pulled, label the boxes. (This way, the person who is working in the VIC can find the box for the meeting planner when he/she comes in to pick it up even if you are not available to help.)

4) **Complete any service request listed on the Services Request Report.** This can include any of the services DCVB provides from ordering a banner to organizing registration assistance to preparing a collateral pick-up.
Please note: it is often possible to fulfill a request before the scheduled service date. Do NOT plan, however, to fulfill requests after a scheduled service date.

5) Record any services that have been completed in D3K

6) Daily Activity report at the end of the day to Director of Services

WEEKLY:

1) Pull Services Requests Report from D3K every Friday afternoon
   Pull a Services Request Report by Scheduled Date for the upcoming week.
   Place collateral order for next week at this time.
   Pull a Services Request Report by Meeting Date to make sure all services for meetings
   taking place in the upcoming week have been provided.

2) Kiosk (at Sheraton and Durham Marriott at the Civic Center)
   Restock with collateral as needed (*usually twice weekly on Tuesdays and Friday’s).
   Update “Calendar of Events” on a monthly basis.

3) Mail Convention Services Packets

4) Mail Post Convention Surveys

5) Attend Remarkabulls Meetings alternate Wednesdays at 8:00 am.

6) Attend weekly divisional meetings

MONTHLY

1) Complete Monthly 3P Report:
   This report is due to Director of Services by the 5th of every month. Begin working on it on the first of the month
   in case there are any computer difficulties which may delay pulling reports; this will give systems Managers ample
   time to fix problems before the report due date.

2) Enter Information for Post Meeting Survey into Excel Database

3) Pull a booking report for Bookings without Services
   Verify that all bookings entered in the past week (especially bureau or co-op bookings),
   have a series of services requests entered. Only organizations for which there is not
   Sufficient time to provide services or where we are lacking the contact information may
   be omitted from having services.
Convention Service Packets

It is the responsibility of the Event Services Assistant to organize the assembly, supply, and distribution of Convention Service Packets.

Maintain a par stock of 20 minimum packets. When reaching a low level, send e-mail to the HR Manager that a volunteer is needed for packet assembly. When volunteer is available, it is the responsibility of the person having the project done to provide (and sign out) all materials, instruct volunteer, clean up after the volunteer, and return any remaining collateral to stock.

Convention Services Directories front and back covers are provided by Communications. Send request in plenty of time to allow them to be able to slot it into their work load. Copies should be made duplexed (two-sided) and bound using the binder in the copy room. Remember to check behind the volunteer to make sure it is turned off after use! Glue strips (binding strips) must be ordered through the Office Manager. Any high anticipated use should be routed in e-mail prior to use to assess inventory and order more if necessary.

Each packet should include (in addition to personalized form letter)
- White/Red Durham Logo pocket folder
- Convention Services Directory * CS prints from D3K, cover is requested from Marcom
- Convention Services Flyer* CS prints
- Graphics Request Form – request from Marcom
- Visitors Guide
- Mini Guide
- Fact & Info Sheet – CS prints
- Business Cards
- Folded copies of all maps
- Major annual events – we print from D3K
Service Request Form

Today’s Date: _______________

Client’s Name: ________________________________

Title: ___________________________________

Company Name: ___________________________________________________________

Address: __________________________________________________________________

Phone:____________________________________     Fax:_____________________________________

Do you need the information/services for a particular meeting or event?   Y/N

If Yes:

Meeting Name: ______________________________________________________

Proposed/Tentative Date(s): ____________________________________________

How many people attending: _______Room Nights: _____ Peak Room Nights:_______

<table>
<thead>
<tr>
<th>Date</th>
<th>Day of Week</th>
<th>Rooms Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Where will people be coming from? Durham / Triangle - State /Regional /National / Intl

Has this meeting already been booked?   Y/N   Hotel/Location:_________________________________

Collateral Requested: (Indicate the number requested next to the item)

<table>
<thead>
<tr>
<th>Item</th>
<th>Collateral</th>
</tr>
</thead>
<tbody>
<tr>
<td>VG</td>
<td>Shopping/Dining Map</td>
</tr>
<tr>
<td>MPG</td>
<td>RTP Self Driving Tour</td>
</tr>
<tr>
<td>CSD</td>
<td>Visitor Map</td>
</tr>
<tr>
<td></td>
<td>Downtown Walking Tour</td>
</tr>
</tbody>
</table>
Service Tactics - Conventions, Meetings and Events

Offer/provide convention services for groups holding meetings in Durham:

**Site Selection Services**
- Official Meeting & Event Planners Guide
- Circulation of Requests for Proposals
- Key Introductions

**Sales & Promotion**
- **Online Housing and Reservation Services**
- **Durham Promotional Video**: The Video is available in the collateral room and must be signed out on the collateral sign-out sheets.
- **Local media list or labels**: To obtain a media list or labels, send the Director the name of the meeting planner, organization/name of meeting, and the manner in which the planner is going to use the media list. They will then pull the list from D3 and make corrections to the database as necessary. Final approval for issuing the list should be obtained from Reyn.
- **Bulletins to alert the local Visitor Industry**: Every week, the Sales Manager mails a lead up-date to the directors of sales at Durham hotels. The VIC manager also e-mails out a community calendar to all lodging properties. If necessary, memo alerts can be e-mailed with either or both of these mailings. Generally, memo alerts are used to notify hotels of calendar corrections and important upcoming meetings.
- **Fact checking for programs and materials**: The Convention Services Department should be pro-active in offering to proof and fact-check programs and materials for upcoming groups. This allows DCVB to assist with corrections PRIOR to literature being issued with erroneous information (i.e. Raleigh-Durham) and to offer graphics assistance.
- **Weekly Reports, Rooming and Attendance Lists**: Routine reports to the meeting planner during a housing bureau keep the planner apprised of the status of their room block during a housing bureau.
- **Transportation/Shuttle Coordination**: The Services Department may offer the meeting planner a list of local transportation options.
- **Planning Tips/Brainstorming**: Occasionally the planner will call DCVB looking for ideas which will help them plan a successful meeting. In this case, the Director of Visitor Services may help the planner brainstorm ideas for anything from entertainment to catering.
- **Convention Services Directory: (CSD)** The convention services directory lists the names and addresses of vendors in Durham who may be of service to a meeting planner. It is the responsibility of the Director of Services and the Event Services Assistant to keep these directories in stock. A task that involves copying the material and binding it with the appropriate covers. As stated earlier in this manual, this is a good job for volunteers.

- **Ideas for Pre- or Post-Convention Tours or Trips**: A meeting planner may call to get ideas for activities for attendees when their meeting is over. Often meetings close with plenty of left over time before plane flights.
In this case the Convention Services Department aids the planner in looking for appropriate recreational or educational options in Durham. An example of one of these activities would be an organized tour of the Museum of Life and Science.

- **Attendance Promotion Materials:** DCVB offers meeting planners a variety of promotional materials to mail possible attendees before the meeting and to give to attendees during the meeting. Some, examples of these materials are the Durham Promotional Brochure (used for mail-in registration packets to lure people to meetings) and the Official Durham Visitors Guide which helps meeting attendees navigate Durham during their stay. Attendance promotion items may be shipped to a planner at cost to DCVB (but not meeting collateral). DCVB will design pre promotional post cards for the event, however we ask that the organizations do their own mailing.

- **Information Number:** DCVB provides the public with two Bull Horn Numbers, which access a 24-hour voice recording of events and activities in the Durham area. These numbers also allow visitors to request information at any time of the day. The numbers are: (919)-688-Bull or (800)-772-Bull.

- **Newsletter/Magazine Articles, Slides and Graphics:** Bi-Monthly, DCVB e-mails the “Bullseye” newsletter to its contacts in the Visitor Sector. DCVB keeps these newsletters for future reference, as they often report important economic statistics. The Communications Department at DCVB also keeps an on-line library of articles, slides and graphics related to Durham, which it will lend to meeting planners to help them promote their meetings. Slides and graphics are available to planners in Camera Ready form to facilitate their publication in convention promotional materials. Upon receiving a request for articles, slides and graphics, the Convention Services Department should refer the client to the Director of Communications. These are also ready to download from the DCVB website.

- **Brochures/Maps:** DCVB offers a variety of maps that meeting attendees may find useful during their stay in Durham. These maps include the Shopping and Dining Guide, African-American Heritage Map, The Southeast Driving Tour Map (RTP), The Downtown Walking Tour Map, Durham Art Map, the mini guide, Street Map, and the Visitors Map (found in the Visitors Guide).

- **Access Information for the Disabled**

- **Local Speakers/Spouse and Children Program Ideas:** DCVB offers a list of “Kids Things To Do In Durham!” The Convention Services Department also assists in planning programs for spouses of meeting attendees who are looking for activities in Durham.

- **Sponsorships**

Some organizations will call seeking sponsorship for their event. DCVB does not offer assistance financially as we are non-profit and funded by the occupancy tax. However, per the approval of Reyn Bowman and/or Shelly Green, a Top Employers list of Durham may help planners target companies that may assist them with sponsorship.

---

**DURING/AFTER THE EVENT**
• **Local Publicity Contacts:** DCVB can provide meeting planners with lists of area media contacts. See “local media list or labels” under Sales & Promotion in this section for more information.

• **Welcome Banner:** Any meeting planner may borrow one of DCVB’s “Welcome to Durham” banners stored in the collateral room. Given enough notice, DCVB will have the banner personalized, (i.e.: “Welcome to Durham, Blackmon Family Reunion 8-5-02 thru 8-9-02”) or if the meeting qualifies with the requisite number of peak room nights (400), the banner will be provided at no charge. See Section on WELCOME BANNERS in this handbook for further information on pre-requisites for complimentary banners and banner ordering procedures.

• **Registration Assistance** DCVB offers meeting planners help with coordination of registration assistance by acting as a liaison with Durham Temporary Agencies or by recruiting DCVB volunteers to work as Assistants. DCVB offers complimentary registration assistance to meetings, which meet certain room night pre-requisites. If DCVB’s registration Assistants are not available or the number of Assistants needed exceeds our capacity, simply provide a list of area temp agencies from D3. DCVB does not coordinate registration assistance for the planner when dealing with an agency.

• **Information/Hospitality Center Assistance** – The same instructions as to registration apply to information desks. However, focus should be on DCVB’s ‘volunteers’ as they are already well schooled in Durham information, whereas an agency may not be able to provide someone with this kind of background.

• **Liaison with Civic Officials/Welcome Letters/Assistance:** The Director of Visitor Services can help meeting planners coordinate Opening Welcome Speeches and Welcome Letters by Durham officials (i.e. the mayor)

We can make a request for a Governor’s Welcome letter, this service is only provided to “High Profile” groups such as the NC Association of Chiefs of Police.

• **Pre-Printed Name Badges:** DCVB offers name badges for meeting attendees to meeting planners at a fee. It is the responsibility of the Director of Visitor Services to keep the variety of labels and Badge holders in stock.

• **Ribbons** – provided at cost. Ribbons are available via vendors such as Nametags Plus. (Catalogues are regularly sent to the Convention Services Department). Advance notice should be received for ribbons, as we need to order specifically to the planner’s request (or give them the information to order directly). DCVB does not maintain a large supply of ribbons, as there is no ‘established’ preference as to color, etc.

• **Folders** – Red Durham Folders, which are used for the Convention Services Packets, are available for the planner at a cost – currently $.75 each. Notify the Communications Department of any anticipated large (100+) use of folders for inventory purposes.

• **Visitor, Dining, Shopping, Entertainment, Event Guides, Maps:** SEE “Attendance Promotion Materials” and “Brochures/Maps” under Sales & Promotion this section.

• **Custom Itineraries** – Tour itineraries are ready-made in the Group Tour Manual. Use these ‘custom’ itineraries as a first option. To adapt to a planner’s needs, the standard tours may be altered to allow for time restraints or personal preferences. DCVB does not coordinate the tour itineraries with the tour sites.

• **Housing/Registration Re-cap:** Housing can be arranged through DCVB via an on-line Housing Bureau when the meeting involves more than 1 property. See Housing Bureau information for more details.
• **Disabled Resources:** DCVB maintains a library of ADA information. Upon request for additional special needs, the Convention Services Department may be called upon to conduct research to locate specific items or services.

• **Cordials (Goody Bags, pencils):** Goody Bags and “Durham” Pencils are available to planners as cordials for their events. These items are located in the collateral room. The “goody bags” must be purchased at .20 cents per bag. The pencils may be distributed one per person.

• **Equipment** – DCVB maintains a database that includes vendors that may supply office equipment, AV, outdoor tents, etc. The Convention Services Department should stay alert to any new companies offering services that may be useful to event planners and keeping the database current, coding new companies for inclusion in the next edition of the Convention Services Directory.

• **Post Convention Surveys:** The Event Services Assistant mails and emails, meeting planners a “post convention survey” and “Thank-You” letter at the completion of every meeting. Returned Surveys help the bureau track the usefulness of DCVB Services and Durham’s popularity as a meeting destination.

• **Community Welcome:** The Convention Services Department may help coordinate a meeting welcome, using either a community official (such as the mayor), or a member of DCVB itself.
Convention Services works from this report for the upcoming week, pull on Friday to order large amounts of collateral from Communications.

1. **Services Summary Report by Scheduled Date.** (Lists all services needing to be completed for the week)

   **Destination 3000 Instructions**
   At ‘Big Blue’ select GROUP SALES from toolbar.
   From the Sales Main Menu, select REPORTS / Convention Service Listings, click on the drop down & select Service Requests by Scheduled Date
   Enter date range for the upcoming week (Sat thru Sun)
   Report will generate all groups with service requests for that week, and details as to what services need to be performed.
   Click the PREVIEW button and the report will appear on screen after a few seconds.
   This will not actually print the report, but will allow you to view the report on the screen.
   From FILE on toolbar, select PRINT in the drop-down program.
   Default printer should send all reports to the BW Printer

2. **Services Summary Report by Meeting Date** - give to the Director of Sales.
   The Sales Division meets every Monday morning for a staff meeting.
   The Event Services Assistant is responsible for printing a summary of upcoming groups and the services that have been provided for them. Highlight what services we have done for them.

   **Destination 3000 Instructions**
   At ‘Big Blue’ select SALES from toolbar.
   From the Sales Main Menu, select REPORTS / Convention Service Listings, from the drop down, select Service Requests by Meeting Date
   Enter date range for the upcoming week (Sat thru Sun)
   Report will generate all groups with service requests meeting for that week, and details as to what services have been performed.
   Click the PREVIEW button and the report will appear on screen after a few seconds.
   This will not actually print the report, but will allow you to view the report on the screen.
   From FILE on toolbar, select PRINT in the drop-down program.
   Default printer should send all reports to the BW Printer

3. **Upcoming Meetings/Convention Review**
   To ensure that no groups have been missed, the Event Services Assistant pulls a calendar that shows all groups (even if no service request was created) for the upcoming 6 weeks.

   **Destination 3000 Instructions**
   At ‘Big Blue’ select Reports from toolbar
   Highlight Option #3 -- BOOKING BASED LISTINGS
   In the drop down select Bookings Without Services
   Enter date range for upcoming 6 weeks in the field for MEETING START DATES
   Click the PREVIEW button and report will appear on screen after a few seconds.
   From FILE on toolbar, select PRINT in the drop-down program.
   Default printer should send all reports to the BW printer.
1) Convention Services is responsible for monitoring accuracy, and researching/reporting unexpected surges or drops in numbers. To pull the reports go to D3 – Group Sales – Reports – Convention Service reports, at the drop down select service request by Actual date, enter fiscal month & fiscal year date ranges & select print. Do another report exactly the same but select Service by Request Date, enter fiscal & month dates & print. Check for missing attendance, peak and room nights.

**Systems is in the process of building further performance indicator reports for us to measure Visitor Service figures as outlined in the Division’s PPO’s.**

Convention Services Response Rates and Research Reports

In D3K, open Group Sales / REPORTS / Convention Services Listings. Then select Services Response Report from the drop-down list and enter the actual distribution dates to be evaluated.

The response rate report compares the date that an INITIAL DISTRIBUTIONS (packet or intro call) is made from the date that it is requested.

The target is to have all initial service contacts made within 7 days of the date first entered in the system.

This report summarizes and provides a comparative ratio for the services that did or did not meet the goal.

Services Research Activities

The research report pulls a monthly total for the number of services for which DCVB was not provided with a contact and additional research was required before initiating services. It generates a report of the success rate (whether a contact exists for the organization at the time of the pull).
Monthly Convention Services PPO’s & 3P Reports

3P Reports - These are due to your supervisor no later than the 4th of each month

Working from your Personal Performance Objectives (PPO) outline your Progress / Problems / Plans.

- Progress toward achieving each of his or her performance objectives.
- Problems experienced in carrying out these plans where outside help may be necessary.
- Plans – solutions or tools you will use to get over the problems

PPO templates are located in G:\W\Visitor Services\PPOs

Be sure to include all measurable statistics in the 3P reports e.g. % increase or decrease of groups and services both by actual & reported figures along with details from the above reports & Convention Services Survey MTD & YTD averages.

Convention Services Exports for Packets and Post Letters

Every Monday, we mail Durham information packets and post-survey forms to meeting planners.

From D3000 “Big Blue”, select SALES from the first drop-down toolbar.

From the Sales Main Menu, select REPORTS | Convention Services Listings

Select either “Export-Service Packets” or “Export-Post Letters” from the Report name drop-down selection.

In the 2 date fields, enter beginning/end dates.
If any service requests meet your date criteria, the resulting contacts will be visible in a table on the screen, and a message box will indicate that the data has been exported or updated and give the file name of the dataset (for exports):

G:\w\temp\service-pkts
OR
G:\w\temp\service-post.

*Note: This function will only pull scheduled services that have not been fulfilled (have an actual distributed date filled in). If there are no letters scheduled to be sent during this date range, the table will be empty.

**Automatic Updates:**

To avoid manual entry of actual distribution dates, you will then return to the Convention Services Reports form. With the export and dates still selected, check “Post as Done” and “OK” to post the current date as the actual distribution date.

Disregard the file location information – the message simply indicates that the process has been completed.

(This may also be done manually at a later time by re-selecting the export and the date range.)

**Letter/Envelope/Label Merges:**

After completing the process above for post or packet merges, simply open the corresponding letter in Word:

G:\w\forms\sales-service\service\PRE-LETTER MERGE

(and corresponding pkt-10 uplabels-mrg to get labels – open and click on the merge icon) or,

G:\w\forms\sales-service\service\POST-MERGE

(and corresponding post-envelopes-mrg to get envelopes – open and click on the merge icon)

Print to the HP8150.

---

**HOTEL REPORTED – BOOKING REPORT**

A Booking Report, called the hotel reporting process is required to gather information on meetings taking place in future months & is required from all hotels.

Request the information from all Hotels, 2 – 3 months prior to the Meeting date. For example, request January/February information in October, this allows time for the information to be entered and follow up with the Meeting Planners

Open File: G:\w\forms\sales-services\SERVICE\hotcal-req

Edit the dates required for the calendar and the date the report is due to DCVB.

Broadcast fax to all hotels Directors of Sales the cover sheet with attached blank reporting form.

To broadcast fax, go to Public folders/All Public Folders/Office Contacts/All Hotels

click on select all & send new message from the outlook toolbar. Enter January/February Booking Report on the subject line & click on insert/file, then hit the send button.

It is often wise to delete certain establishments from the All Hotel list. To do this, highlight the first contact, go to edit/select all, then scroll up to your cabinet & drag & drop the selection into your contacts folder, this allows you to delete unwanted properties, such as B&B’s, the R. David Thomas Center etc.
As reports are returned from hotels, enter data information into D3K, entering contacts (when provided) and setting up initial Service Packet, Follow-up call, Scall and Post, for each meeting.

If there is minimal information about the meeting enter the Research service.

**Sales/Service Data Entry Instructions**

**Understanding Codes**

Under **Booked by** there will be the following:

- **B** this is used when any lead is issued by the bureau
- **C** this is used when the planner contacts the hotel directly (us giving verbal referral or mailing MPG) or if you assisted in any way before the hotel is booked.
- **L** this is used when the meeting is already booked & the planner contacts you after the fact
- **R** this is used when the hotel reports the meeting

Under **Lead Type** there will be the following:

1. **Bureau issued lead.** This is used when a hard lead is issued by the bureau, with more than 10 peak room nights
2. **Co-Op.** This is used when the planner has contacted the hotel directly but not yet booked.
3. **Courtesy.** This is used when there are 10 or less peak rooms booked, regardless of booked by.
4. **GT – issued.** Bureau issued Group Tour Lead
5. **GT – Co-op.** Co-op Group Tour lead
6. **X** Film Lead

When a planner calls with information, gather all on the Sales inquiry form.

To enter in D3 search for the org first, if there is no org listed open a new account, if there is one already in, open that one. You will have the **account screen** detail, fill in all information including rep: Account type: Market Segment: and phone & address.

Click on **contact** button. This takes you to the 1st contact screen, if your contact is not listed click on **new** & fill in all info.

Click on **detail** button, this takes you back to the **account screen**. Click on **Meeting** button, fill in the meeting name, Rep, Meeting frequency and Meeting Type.

Click on the **contact** button. (This is to bring the contact through to the 2nd level) If your contact is not there click on **New** then double click on your contact name to enter it.

Return to **meeting** screen.

Click on **Booking** button, this opens the **booking screen**. Fill in all information

For a bureau issued lead be sure to enter **B** in **Booked by box** & **(1)** in **Lead Type box**, if there are more than 10 room nights. 10 or less would make it a **(3) Courtesy** in the **Lead Type**.

Also be sure to fill in **Decision Maker, Decision Date, Bids Due to DCVB, Alternate dates & Send Bids To** fields.

In the **Booked Date** field, only enter a date if the booking is definite, when sending out a Bureau or Co-op issued lead this field will remain blank until the planner chooses a property.

Do not fill in the definite date until the meeting is booked at a hotel (the exceptions to this are for most weddings/social affairs, many co-op’s, local & courtesy bookings)

Make sure the following fields are filled in: Sales Rep, Booked by, Lead issued, Lead Type, Arrival Date, Departure Date, Meeting start date, Meeting end date, Scope, # of Delegates.

Click on the **Booking Hotel** if property has been selected **NOTE** When a booking is definite this field must be filled in. If they are using various properties use Alternate Durham Venues. Click on **HQ** button.

Click on the **Room flow button** to add peak number of rooms for each night, always click update button to make sure data is entered.
When entering a Bureau issued lead, click on the Lead Specs button. When entering meeting specs, enter information/needs by day & date in order.

If you are sending out a hard lead go to File/ from the drop down select Sales Lead Control. The first screen to appear will allow you to select certain criteria. eg: GM & DOS Durham Lodging Properties or Durham Meeting Facilities. Also if you want to include the planners address. Click on the preview button. This will bring up the lead sheet as they will appear to all DOS & GM’s.

Always check that the information & dates have been entered correctly & that all phone numbers are correct.

When ready to send go to print & select print from the drop down. Print to the Acrobat PDF writer & save file in the G:/W:/Temp directory with the Meeting name as the file name. (You will be inserting this in your email to all the properties.

If the booking is definite go to File/ from the drop down select Services. This will bring you to the services screen. It is very important to fill in this information & dates correctly:

Click on the new folder option & enter services 4 services must be entered for each definite booking.

First enter the date you are making your request – always todays date. Then enter the date you want the service to take place

The third space for a date is filled in by Convention Services when it is completed. This will not happen unless the other 2 dates are entered correctly.

**Note: It is very important to enter a 1st service within 7 days of the booking turning definite, this can be either an introduction letter or packet**

Click on Contact button & double click on contact name to automatically enter information.

Click on Service button to enter:

Intro: This service is used if a meeting is taking place a year or more into the future, we will send a letter to the planner letting them know we will be contacting them closer to the date.

1st – Pkt this will send out a convention services packet – schedule for the following Monday.

2nd – Fcall this will enable a follow up call schedule for 1 – 2 weeks after the pkt.

3rd – Scall this will enable a final call, schedule for 2 weeks before the meeting.

4th - Post this will send out a convention services survey & thank you letter.

It is important to note that if the booking is 1 – 2 yrs in the future, enter the first service as an Introduction Letter, with the packet being entered 6 months prior to the meeting start date.

Requests for ‘general’ information should always be qualified to determine if there is a potential meeting and thus set up a lead. Even if the person does not have definite dates, having the month/year and estimated numbers is sufficient to create a lead. A packet mailed to a planner should simply have an organizational screen created with a trace for the salesperson and no further recording is necessary.

When a call is received, use the following form to take all information from the client and to help determine what actions need to be taken. (G:\w\forms\serv.frm)

**Convention Services Post Convention Survey Report**

After each convention for which we have contact information, a post survey is issued. (See instructions for Post Mailing for more information.)

When surveys are returned, they are delivered to the Event Services Assistant. The CSA will then make copies of ALL responses and route to Jonathan, Lenore, & appropriate Sales Manager, keeping the original for tracking.

The survey responses are then logged in the following spreadsheet (which contains 2 sections), according to the month in which they were received: G:\W\RM\Measurement\Surveys\MP Survey click the thumbnail across the bottom of the screen to move to different months.
Type the name of the group (abbreviated is acceptable) in the first column and post the corresponding ratings that are given. Many times, some of the questions are not rated or the person will write in ‘N/A’. Enter 0 for these. The averages will compute automatically within each category, based on the number of responses to the particular question.

<table>
<thead>
<tr>
<th>Meeting Planner Survey</th>
<th>DCVB Staff Person</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Met my expectations</td>
</tr>
<tr>
<td>1 Curator Reunion</td>
<td>4</td>
</tr>
<tr>
<td>2 National Auto Dealers</td>
<td>5</td>
</tr>
<tr>
<td>3 Holy Royal Arch Mars</td>
<td>5</td>
</tr>
<tr>
<td>4 10 20 21 22</td>
<td></td>
</tr>
<tr>
<td>Average Ratings</td>
<td>5.0</td>
</tr>
<tr>
<td>Year-to-Date Averages:</td>
<td></td>
</tr>
<tr>
<td>VTDB # of Surveyed:</td>
<td>20</td>
</tr>
<tr>
<td>Variance to SMVY</td>
<td></td>
</tr>
<tr>
<td>Count of respondents</td>
<td></td>
</tr>
<tr>
<td>sum of totals</td>
<td>12</td>
</tr>
<tr>
<td>sum of YTD totals</td>
<td>125</td>
</tr>
<tr>
<td>Count of responses YTD</td>
<td>25</td>
</tr>
<tr>
<td>VTDB Avg</td>
<td></td>
</tr>
</tbody>
</table>

Additional Comments:
- You did an excellent job helping me - thanks
- Need clearer road maps for seniors

In the lower part of the form, there is a shaded area in which the name of the person and group is entered with specific comments.

Moving across the form to the right, there is a second section that measures how many of the respondents used various DCVB services. Continue across in the row that contains the name of the organization and enter a ‘1’ in the field of the services indicated as used.

The percentage of groups using each of the services is calculated at the bottom of the screen – both for the month and an aggregate year-to-date basis.

Additional space is also available for comments.

To Print:
Highlight the entire area to be printed (both sides) by clicking and dragging from the lower right corner to the upper left corner
Select FILE | SET PRINT AREA
Select Print Set up & click on the radio button – Fit to 1 page.
Then FILE | PRINT
Select the BW printer and print.

Services provided for Meetings and Conventions

Registration/Information Assistance

In order to:
Offer a competitive level of registration assistance for groups meeting in Durham
Provide the best convention services possible
Create incentives for larger groups to meet in Durham
Utilize the local visitor industry as a provider of this service to encourage economic development/impact

Recommendations:
Offer complimentary display and information/registration materials for all groups meeting in Durham.
If groups meet room night criteria, offer on-site registration assistance and explain policies
We provide 2 hrs free assistance for 100 – 399 peak room nights
We provide 4 hrs free assistance for 400+ peak room nights.
We can provide further assistance or for groups that do not qualify at a rate of $15 per hour.

Temporary Assistance Policies & Procedures

When receiving a request for temporary assistance, determine if the need is something that could be handled by the DCVB volunteer staff. Our volunteer staff is relatively small & would best be suited for “help desk/area information”.

Registration/Information Table Assistance Criteria:

1. 4 hours of complimentary registration assistance when 400 Peak rooms or more rooms are used
2. 2 hours of complimentary registration assistance when 100-399 Peak rooms are used.
3. Additional assistance or registration assistance for groups not meeting these criteria is available at $15 per hr.

Help Desk/Area Information Request: (subject to availability)
Un-manned information tables are complimentary, but complimentary staffed booths must meet the same requirements as registration assistance

Durham, Greater Raleigh, and Chapel Hill/Orange County CVBs have an agreement by which all must comply: If a meeting planner requests information on another community outside of the one in which they are meeting, the services dept. (whichever one is contacted by the planner), calls the other CVB to make arrangements and the HOST CVB would provide the material. CVB staff are not authorized to place their own materials in a hotel in the competitor’s community. However, when explaining this to a planner, it must not be presented as jurisdictional, but as a means to not confuse the visitor – and that they only need to do one-stop-shopping and get all of their information from one source.

DCVB Staff volunteers are listed in public folders/office contacts/volunteers

If assistance is complimentary (DCVB pays): Timesheets should be turned in by the volunteer to Services Assistant for processing. (g:\w\forms\timecrd.frm). Services Assistant creates a PO and submits that with the timesheet to Director of Services for approval. They then submit the PO to the Operations Manager so that check may be cut. The volunteers are paid $10.00/hour by the Bureau, (the PO does not include tax calculations etc.). The COA # is 8410B.
If client is paying: Payments should be made directly to the volunteer @ $15.00/ hr.

Signage should be brought to put on information table.
- There is a vinyl banner that says “Durham Visitor Information”
- Should another community be present at the information table per the request of the planner (this is only in certain situations where this would be allowed – regional events), a sign should be made that reads “Nearby Communities” Marcom will supply this.

Registration Assistance

Purpose of The Job:
To greet all delegates as they arrive, distribute registration materials if delegates have pre-registered and facilitate registration if they have not.
**Most Important Responsibilities:**

- Receive, process and direct all incoming delegates, making them feel welcome to Durham!
- Follow registration procedures put in place by the planner.

**Job Related Knowledge:**

- DCVB mission, goals and objectives.
- DCVB policies and procedures
- Durham as a convention and visitor destination.
- Communications and public relations.
- Ability to follow registration procedures as set by the meeting planner.

**Collateral Distribution**

DCVB distributes collateral/promotional materials as a service to planners meeting in Durham only. Durham, Raleigh, and Chapel Hill CVBs have a mutual agreement that we will not distribute any respective literature at a conference being held within another community, even upon request from a planner. First educate the planner on the actual proximity of the three communities. If he/she still desires the literature and indicates delegates will have enough time to visit other communities, then refer the planner to the respective bureau of the city in which the meeting is being held. DCVB will provide literature to the other CVB to distribute to the planner.

If the request is processed in a reasonable amount of time, DCVB can arrange a drop-off of collateral at the hotel, otherwise the planner must pick up the materials.

We do not mail collateral unless the planner incurs the expense (ie with their FedEx #) due to the expense and our non-profit status.

The chart below indicates distribution protocols for DCVB. While we are glad to supply collateral, remind planners using the Marriott At The Durham Civic Center and the Sheraton Imperial Hotel that the Kiosk is a permanent fixture in the meeting area with all collateral pieces and will be kept fully stocked for all delegates.

If planner opts to use kiosk materials at convention centers, send e-mail to Visitor Services to alert them to send extra collateral to the hotel so it can be re-stocked by hotel staff on an as-needed basis.

<table>
<thead>
<tr>
<th>COLLATERAL</th>
<th>PROTOCOL</th>
<th>COSTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors Guides</td>
<td>75 Vgs per 100 peak R/N Plenty at registration table</td>
<td>VG’s are free per peak room protocol. If Client wants more, VG’s are 75 cents per additional VG.</td>
</tr>
<tr>
<td>Promo Brochures</td>
<td>Any reasonable request</td>
<td>No charge</td>
</tr>
<tr>
<td>Give-aways</td>
<td>1 per attendee</td>
<td>No charge (subject to availability)</td>
</tr>
<tr>
<td>Maps</td>
<td>Any reasonable request</td>
<td>No charge</td>
</tr>
<tr>
<td>RTP/S.D. Tour Visitor Map</td>
<td>Any reasonable request</td>
<td>No charge</td>
</tr>
<tr>
<td><strong>D.T. Walking Tour</strong></td>
<td><strong>Calendar of Events</strong></td>
<td><strong>No charge</strong></td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------</td>
<td>--------------</td>
</tr>
<tr>
<td><strong>Dine/Shop Map</strong></td>
<td><strong>Goody Bags</strong></td>
<td><strong>$.10 each</strong></td>
</tr>
<tr>
<td><strong>Art Map</strong></td>
<td><strong>Name Badges</strong></td>
<td></td>
</tr>
<tr>
<td>****</td>
<td><strong>Mailing Lists</strong></td>
<td></td>
</tr>
<tr>
<td>****</td>
<td><strong>Mailing Labels</strong></td>
<td></td>
</tr>
<tr>
<td>****</td>
<td><strong>Banners</strong></td>
<td></td>
</tr>
<tr>
<td>****</td>
<td><strong>Durham Folders</strong></td>
<td></td>
</tr>
</tbody>
</table>

| ****                  | ****                  |              |

**Calendar of Events**

Customized for planner. Planner provided with master to make own copies.

**Goody Bags**

Planner responsible for stuffing bags; DCVB does not provide this service.

**Name Badges**

At cost to all groups.

**Mailing Lists**

Available to groups holding a meeting in Durham; criteria for database pull must match our criteria.

**Mailing Labels**

Available only to groups holding a meeting in Durham; criteria for database pull must match our criteria.

**Banners**

Generic Durham welcome banner available for groups with 400 attendees and/or 100+ peak R/N.

**Durham Folders**

Red folders only – limited supply.

| ****                  | ****                  |              |

All billable items must be paid for in advance or upon receipt. DCVB accepts cash, approved checks, or MC/VISA. Payment is processed through the VIC.

For large organizations, such as Duke, NCCU, we will send an invoice – it is important to get all the correct information up front, such as contact, department & billing address.

VGs: Based upon DCVB historical data and surveys among other CVB’s, this is standard industry distribution criteria. Due to the expense of this piece, planners requesting high volumes of information are encouraged to take advantage of the less-expensive Mini Guide.

Providing Visitor Guides at registration/Information tables on an individual basis reduces waste for DCVB.

Calendar of Events: Information is a customized pull from our database and will depend on the needs of each individual group. We will provide for the planner a master copy from which copies can be made by the planner. All reports must contain DCVB logo before distribution.

The above are minimums. We reserve the right to increase for certain groups as sales incentive or have potential for increased business directly or indirectly.

On the following page is the form we print for groups requiring enhanced services, usually very large conferences or high profile/Community partner events.
<table>
<thead>
<tr>
<th>Service Option</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation &amp; Shuttle Assistance</td>
<td>Vendor Lists</td>
</tr>
<tr>
<td>Suggestions for Pre and Post – Convention Tours</td>
<td>Suggestions for Spouse/ Children’s trips and Activities</td>
</tr>
<tr>
<td>Copies of Calendar of Local Events</td>
<td>Registration assistance:</td>
</tr>
<tr>
<td>ADA Information</td>
<td>4 Hours complimentary with 400 rooms</td>
</tr>
<tr>
<td>Assistance donating excess event food to the Community Kitchen</td>
<td>2 Hours complimentary with 100 to 399 Information/Welcome tables/booth</td>
</tr>
<tr>
<td>Promotional materials: Slides, Photographs &amp; Graphics</td>
<td>“Welcome to Durham” Banner</td>
</tr>
<tr>
<td>Durham Promotional Video</td>
<td>Welcome letters from community or Civic Leaders</td>
</tr>
<tr>
<td>Local Media lists &amp; labels</td>
<td>Name Badges at cost</td>
</tr>
<tr>
<td>Bulletins to alert local Visitor Industry</td>
<td>Fact checking for Programs &amp; Materials</td>
</tr>
</tbody>
</table>

**Enhanced DCVB Service Options for (Meeting name)**

- Information Tables at all Hotels
  - Outdoor Kiosk
  - Special Amenity Items
- Customized Welcome Banner
- Special Website Banners
- “Hot-Links” on DCVB Website
- Special Access on DCVB “Bull-Horn”
- Lodging Hotline
- Promotion through DCVB “Bulls-Eye” Newsletter
- Promotion through DCVB Community Calendar of Events
- Database Lists-Community, Employers, Media, etc.
  - Complimentary DCVB Blank Name Badges
  - Complimentary Information Assistance
**Badge Preparation**

**Purpose of the Job:**
To process name badges for a convention or meeting.

**Most Important Responsibilities:**
- Prepare name badges for delegates to the event, including typing or data entry, printing tearing perforated edges, if needed, and placing in badge holder.
- Provide general assistance, as needed.

**Job-Related Knowledge:**
- DCVB mission, goals and objectives.
- General knowledge of the organization employee is assigned to.
- DCVB policies and procedures as they pertain to temporary employees.
- Durham as a convention and visitor destination.
- Communications and public relations.
- DCVB equipment and software will vary, depending on the organization and arrangements made.

**Laser Printed Durham Namebadges**

1. In G:/W/Visitor Services/NameBadges open the excel template. Enter names as instructed and save under a different name – do not save to the template.
2. Key in individual names in each respective column: Prefix (Mr./Ms., First Name, Last Name, & Company)
3. Open word.doc template and select merge to a new document
4. **Save file to a new name – based on the project itself.** (FILE | SAVE AS)....& use directory tree to name **USE CAUTION -- ALWAYS USE THE CLEAR COMMAND, NOT DELETE, TO REMOVE ANY DATA WITHIN A ROW. YOU MAY THEN CUT & PASTE INTO THE ROW THAT WAS CLEARED OR KEY IN A NEW RECORD IN THE BLANK FIELD!** Whatever is typed in the first name field is what shows up in 36 pt fonts on the top line of the badge. Try to keep length of data for each field approximately the displayed width of each field (so that the text doesn't wrap within a field) is so that text doesn't run over available space for fitting in the label.
5. Starting from the bottom right-hand corner of the LAST record, click and drag up and to the left, making sure that all columns of each completed record are highlighted (including blank column A for spacing purposes!).
6. PROOF and SORT the records using the spell check and sort functions:
**To Spell Check:** Type `<CTRL> <A>` to highlight ‘all’ or highlight a column to be spell-checked. Select **TOOLS | SPELLING** from the main toolbar. It will check highlighted cells and prompt you to ignore or correct/change each cell that the spellchecker questions.

**To Sort Data:** Highlight the column you wish to sort by and click on the Sort-Ascending. or Sort-

Descending icon on the toolbar:

7. Select **FILE | PRINT AREA | SELECT PRINT AREA** from the main toolbar. Then print the list to the B&W printer for final proofing by Shelly/Carolyn before printing labels.
8. Select the print area for all labels (see step 7) and select **FILE | PRINT** and select the HP8150 Plain.
9. Click the OPTIONS button at the bottom of the window. Choose Manual Feed for the default tray and then print to the HP8150 printer.

**To Order More Name Badge Holders, go through PC Nametag.** We usually order acetate nametag holders with either pin or the Clip. Ask supervisor which one to order.

**Dining Options**

Most groups are interested in at least obtaining information on restaurants in the vicinity of the hotel in which their convention is being held. Other groups are interested in more detailed services, to include setting up a complete dine-around with DCVB registration.

DCVB offers a Dining and Shopping Map, which should be offered first.

If a meeting planner wants a more detailed list of restaurants near a specific hotel, open the DCVB website: [www.durham-nc.com](http://www.durham-nc.com), click on Visitor info on the left hand index, then click on Places to Eat. In the query box enter the area of Durham where the hotel is located & print.

**DINE-AROUND**

DCVB offers assistance to planners who desire an evening out at local restaurants for their delegates. The Director of Visitor Services may offer to help plan the evening, the restaurant selection, transportation, and actually assist in coordination of the event, depending on the group.

As a dine-around takes extensive coordination, communicate to the planner that AT LEAST one month notice is required to coordinate.

**Restaurant Selection**

- Identify to planner the various clusters of restaurants available as options, preferably those in close proximity to the headquarters hotel. (Dining/Shopping Map)
- Identify those restaurants that are ‘Uniquely Durham’ or have received local recognition through surveys conducted by DCVB (since we do not give recommendations)
- Director of Visitor Services contacts restaurants for reservation arrangements with the selected restaurants. Follow up with a memo explaining dine-around instructions and encouraging a very positive presentation for Durham visitors.
- Once restaurant selection is made, send request to Communications for dine-around map many of the routes are already included in Illustrator and may be customized for group
- **Communicate to planner that delegates will need to sign up for dine-around by 5 pm of the day prior to the dine-around so that reservations can be made. This is something they should publish in their program or brochures.** This will allow restaurants to offer their best service and minimize any waiting time upon arrival.
- Arrange notebook for registration desk (multiples if a large group).
- Menus for all restaurant options.
- Sign-up sheets for each restaurant (include # lines for maximum # of reservations).
- If there are two departure times, set up two sheets per restaurant for each time.
Include deadline reminder on sign-up sheets.

At noon on day of dine-around, call in number of reservations to each restaurant and remove the notebooks.

Have window cards printed for dine-around and the restaurant the shuttle is going to. Delegates simply select the bus that is going to their restaurant choice.

Make sure delegates are aware of departure times from restaurants. Anyone remaining after the designated time will have to do so at their own expense for transportation.

Transportation

If planner desires, DCVB will assist in coordinating transportation.

Southern Coach is the Shuttle Company DCVB usually uses.

Before contacting transportation companies, you must have the following:
  o Estimated number of delegates that may participate
  o Date of dine-around
  o Hotel properties that will be involved
  o Tentative ideas of restaurants in the dine-around
  o Times that coaches should be available and timing between shuttles

Planner will make negotiations and final arrangements with the transportation company

SAMPLE DURHAM DINE AROUND
BRIGHTLEAF SQUARE CLUSTER

Restaurant & Type of Cuisine:
Anotherthyme, (Multi-cultural cuisine)
Pop’s, A Durham Trattoria, (Pasta, Seafood)
Taverna Nikos, (Greek Cuisine)
Torero’s, Mexican (Cuisine)

Shuttle Schedule:
Passenger Boarding 6:30 pm
Depart Holiday Inn-RTP 6:45 pm
Arrive at Restaurants 7:15 pm
Passengers Reboard 9:15 pm
Return to Holiday Inn-RTP 10:00 pm

Uniquely Durham Restaurants:
Bullock’s Bar-B-Que (Hillsborough Rd)
Parizade (Erwin Square)
Anotherthyme (Brightleaf)
Tarverna Nikos (Brightleaf)

Shuttle Schedule:
Passenger Boarding 6:30 pm
Depart Holiday Inn-RTP 6:45 pm
Arrive at Restaurants 7:15 pm
Passengers Pick-up 9:15 pm
Return to Holiday Inn 10:30 pm
<table>
<thead>
<tr>
<th>INFORMATION FOR DONATING EXCESS FOOD TO COMMUNITY ORGANIZATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Kitchen/Soup Kitchen</td>
</tr>
<tr>
<td>CONTACT: Betsy Rawlins</td>
</tr>
<tr>
<td>688-7378</td>
</tr>
<tr>
<td>EXCEPTIONS: Items received depend on season—call first. (Picnic food in heat of summer: n/a; refrigerated items - maybe)</td>
</tr>
<tr>
<td>Transportation may be necessary; Packaging beforehand is a must.</td>
</tr>
<tr>
<td>Interfaith Food Shuttle</td>
</tr>
<tr>
<td>CONTACT: Jill Bullard</td>
</tr>
<tr>
<td>250-0043</td>
</tr>
<tr>
<td>This transportation option could be used if food is going to a service organization in Durham (Need to be specified by the meeting planner for group donating food)</td>
</tr>
</tbody>
</table>

**MEALS ON WHEELS IS NO LONGER AN OPTION**
Donation of Excess Food from Durham Meetings & Conventions

- Notify hotel Convention Assistant/Catering Manager of your intentions to donate food to Interfaith Food Shuttle. (Provide a copy of this form.)

- Indicate name of hotel/meeting site: ______________________________

- Indicate date(s) and time(s) for food pickup:
  Date: __________________________ Time: __________________________
  __________________________  __________________________
  __________________________  __________________________
  __________________________  __________________________
  __________________________  __________________________

- Indicate your choice of community organization to which you would like the food donated:
  - Community Kitchen
  - Durham Rescue Mission
  - Community Shelter for Hope
  - TROSA

Notif: Jill Bullard at Interfaith Shuttle and fax this form to: 919-250-0416

Name: __________________________________________
Organization: ______________________________________
Address: __________________________________________
Phone #: __________________________________________
Housing Bureau Services

An On-Line Housing Bureau is provided by DCVB upon request by large groups or sporting events utilizing two or more Durham Properties.

Criteria:
To qualify for an in-house housing bureau groups must:

- Have no fewer than 100 attendees and no more than 400 for the in-house bureau
- Utilize no fewer than 2 hotels and no more than 6
- Have a minimum of 2 months between the time of signing lodging contracts and the start of the housing bureau

For groups larger than 400 attendees, we would need to out-source the housing bureau – this process can take as long as 6 months to a year to set in place. **NOTE** The cost associated with out sourcing a housing bureau will be $10 per reservation.

Process:

- The offer of the use of the DCVB housing bureau will become a part of the sales process
- DCVB Sales Managers must include the request for a housing bureau in the RFP, in-house housing bureaus will charge $2 per reservation. **NOTE** This amount needs to be included in the room cost presented to the group by the responding hotel.
- Hotels provide bids for the rooms and indicate a room block they will hold for the group. Arrangements for housing bureau must be made prior to planner obtaining room rates.
- A total room block City-wide is assembled and housing bureau costs (and transportation costs if applicable) are added to that rate for publication. These are the rates published to the delegates
- A housing bureau can only be established once the group has signed a contract with the chosen properties and the DCVB.
- Information needed from the meeting planner:
  1. Opening and closing dates for the bureau
  2. The housing bureau will remain open for 6 weeks
  3. Number of rooms blocked on each given night at each property
  4. Attendee categories, i.e. Exhibitors, staff, attendees
  5. Type of rooms (e.g.: Single/Dbl, etc.)
  6. Dates of room block
7. Web site address that the housing bureau will reside on

- The DOS must sign DCVB’s housing bureau form of agreement and need to be aware that DCVB will bill them the per reservation fee once post housing attendees have been confirmed.
- G:\W\FORMS\Sales_Service\Services\Housing
- The lodging properties also need to be aware that no rooms can be booked outside the housing bureau for the conference attendees, exhibitors or other sub-groups.
- The DCVB sales manager must immediately notify VS of the need for an on-line housing bureau, VS then gathers the needed information to send to IT.
- The on-line housing form will contain information as to the name of the group, name of meeting, dates, and hotel options. Provide a deadline PRIOR to when the on-line service will be started to verify information.
- The group will be required to have a web site for the housing bureau link to reside on. (DCVB will not build a special web page on their site)
- We will post a link from our site to the host sites chosen housing bureau page

Costs:

- Charges for an in-house bureau are $2.00 per reservation (not per night). This fee absorbs costs for processing since this often involves bringing in temporary personnel to manage the project full-time, supplies, and the cost of a dedicated website housing bureau.
- The costs associated with out-sourcing the housing bureau (400 or more attendees), will be $10 per reservation. It is important to note that if the planner shows interest in this service to immediately notify VS & IT so they can review the latest in bureau technology.
- Transportation costs involved in shuttling delegates from various hotel properties are treated separately from the housing bureau and distributed among the cost of rooms. Southern Coach or Lighthouse International are our primary carriers offering this service and have provided a standard bid (which is subject to change based on availability, size of group, and season.)

Welcome Banner Policies & Procedures

Convention Services will be responsible for ordering and delivering DCVB banners for the meeting.

Complimentary Welcome Banners:

- CUSTOMIZED Banners require minimum of 200 peak room nights
- The only banners provided by the DCVB are our standard 3’x8’ or 3’x10’ “Welcome to Durham” banner. Size will be determined by availability and length of group name. Any deviation from this must have prior approval by the Director of Visitor Services.
- The banner will include “Welcome to Durham”, the group’s name , the meeting dates, and a small block of DCVB information.
- Should a group not qualify for a complimentary banner, put the group directly in touch with Carolina Banner to order their own banner. Arrangements, including payment, would be the group’s responsibility.

Ordering Procedures:
All banners are to be ordered through Carolina Banner. Our contact there is Jeep. He may be reached by phone (490-5487) or fax (491-1162). Carolina Banner is located at 2699 Chapel Hill Blvd.

TO PLACE AN ORDER:
• Enter G:\W\Fprms\Sales-Service\Services\Banner Request Form
• Enter pertinent information. (Always get specifics of wording etc. from the planner)
• Print and fax copy to Carolina Banner with cover page including date needed
• Please try to give at least a week’s notice to Carolina Banner

TO PAY FOR BANNERS: HOW TO DO A P.O.

1) If invoice is mailed to us, it will automatically go to the front desk to be logged and then, Operations for processing. If the invoice is delivered to service staff, it must be given to the front desk to be logged and routed.
2) Each year a new standing PO must be created for banner payments, this also applies to volunteer payments.

City-Wide Event Banners

In a joint agreement with the City of Durham and DDI, DCVB will route all requests for banners to be hung in the city streets to Downtown Durham Inc.

Contact: Director of Marketing, DDI: 682-2800

Throughout the Downtown Durham area there are approximately 100, 3x6 banners hung on light poles, promoting the City of Durham. Groups that meet the qualifications have the option of hanging a smaller banner underneath the regular banners (at the group’s expense).

Policies and Procedures

Groups requesting to hang special event banners must submit an official application (provided by DDI) at least 90 days in advance. Special events must meet the criteria and intent of the guidelines given. A committee will review all applications to allow groups adequate time for banner production. The intent of the program is to provide events with BROAD community appeal the opportunity to hang their banners in Downtown Durham.

• Groups requesting banners must be registered as a not-for-profit association, organization, or group with the exception of commercial groups holding large meetings at the Civic Center Plaza.
• Events held in downtown will be given priority over non-downtown events.
• Events must have a broad community appeal.
  Examples: African American Film Festival, CenterFest, Bimbe, Durham Alive!, Festival on the Eno, Bull Durham Blues Festival, American Dance Festival.

Banners That DO NOT QUALIFY Include, but are not limited to:
• Banners celebrating nationally recognized days or weeks
• Banners advertising products, businesses, schools, athletic events
• Banners recognizing individuals
• Banners promoting religious events
• Banners advertising meetings, convention, or tradeshows*
Important Conditions

- Banners must be purchased from one of 2 pre-approved vendors.
- Banners must be put up/taken down by TROSA. Contracts with TROSA must be handled by the organization requesting banners.
- Banners must be removed in time frame specified by banner committee or organization will not be considered for future events.
- Banner applications will be considered on a first-come, first-serve basis.
- Banner design must adhere to specifications outlined.
- A minimum of 12 banners must be hung.

* Large groups holding events at the Durham Marriott At The Civic Center may qualify for banner placement in areas immediately surrounding the Civic Center. Groups wishing to do this must pre-qualify with the Durham Convention & Visitors Bureau. Groups that will be considered must be State-wide, regional, national, or international in scope and/or visitor-related.

Downtown Durham Banner Specifications

Size and Colors
All special event banners must be 18 inches high and 30 inches wide.
Banner material colors may be red, yellow, white, or blue.
Lettering may be white, black, red, yellow, white, or blue.

Sources
Banners must be ordered from one of the following companies:
**Downtown Graphics Network**: 1-704-637-6240
These banners are $10-$15 each.
They are simply a piece of banner material with holes in the top for hanging.

**Upbeat Banners**: 1-800-325-3047
These banners are about $50 each.
They are made of banner material but have a thick bar in the top and bottom to keep them taut and provide some kind of weight against being blown by the wind.

Banner Installation
Banner installation may only be done by TROSA, Triangle Residential Options for Substance Abusers.
Approximate cost of banner installation and removal is $15 per banner.
Once banners have been approved and dates assigned, planner should contact Alvester Ellis at TROSA to arrange for installation and removal: 419-1059 / fax: 490-1930

Banner Location
Planner must indicate which zone(s) banners are to be hung. Banners and placement must be approved prior to contact being made with TROSA. Once approved, a representative from the organization may work out details of banner placement within a zone with TROSA. (DDI has maps of the zones available for groups.) Banners may go only where existing banners/brackets are in place. Any questions regarding banner placement should be discussed with office of Downtown Durham Inc. PRIOR to banners being hung by TROSA.
Request to Hang Banners in Downtown Durham

Date request Received______________________(staff to complete)

Name of Group______________________________________________________________
Address__________________________________________________________zip_________

Group Representative: ______________________________daytime phone______________
Address (if different than above)_________________________________________________
zip________________

Name of event for which banners are to be hung____________________________________
Date(s) of event)_____________________________________________________________
Event Description______________________________________________________________

Number of Banners to be hung ______________ Color zones(s) requested for placement__________

Dates requested for banners to be hung. Start:_____________________End:________________
Proposed Banner Wording*____________________________________________________________________

Please enclose copy of any logo to be used on banner.

*Event sponsors may not be listed on banners.

We have read and agree to abide by the conditions presented in these documents.

________________________
Signature of Group Representative Date

Please feel free to attach any supporting documentation.
Questions may be directed to 919-682-2800 / fax 919-682-1980
All decisions are final.
Requests may not be submitted more than one year in advance of event.

Return to: DDI Banner Program – 115 Market St. #213 – Durham, NC 27701
COMMUNITY / CIVIC LEADER WELCOME

To make visitors feel welcome, the DCVB often coordinates a personal welcome from a community leader. This may entail:

- Personal Welcome Address
- Welcome letters
- Proclamation (designating a day for a group)

If DCVB staff welcome is requested, the sales market to who the group belongs will oblige. If the appropriate sales manager is unavailable, then Convention Services is responsible for the welcome. Welcome letters from DCVB should be addressed from Reyn. Always route to Reyn for approval before issuing a welcome letter! Per Reyn we only provide 1 copy of the welcome letter, the group organizer will have to make their own copies. Welcome letters are located in:

G:\w\forms\sales-service\welnatl-frm.doc (for national groups)
G:\w\forms\sales-service\welreg-frm.doc (for regional groups)
G:\w\forms\sales-service\weltri-frm.doc (for groups based in Triangle area)

Other welcome letters that have been drafted for specific groups are saved in this same area and may be used as samples or templates to create now ones. Import Reyn’s signature (Executive Assistant will have to open the letter and insert Reyn’s signature as she is the only person with authorization to use his signature template.)

For mayoral welcome addresses, welcome letters, or proclamations, DCVB contacts the mayor’s office and makes the request for the group. We need some history/background information about the group/association, dates of meeting, HQ hotel and the date the letter is needed by. It is simplest to e-mail the request to the mayor, but always copy his Assistant. Keep a copy of the request for future reference and follow up. Make notes in the D3 service record as to the request:

- Date by which you need the request completed
- Correct name of the group
- Purpose/focus of the organization
- The organization’s charitable causes
- Correct dates of the event
- Specific date and time that the mayor is requested (for personal appearances)
- Location of the event

The mayor’s office keeps a form letter on file, but in the event we need a copy it is located in:

G:\w\forms\mayorwel-ltr.doc

After making the initial request, follow up with the mayor’s secretary to confirm. Call and confirm with the mayor a couple of weeks before the date for the request. Confirm with the planner the specific times for mayor’s appearance and time allowance.

To obtain the letters or proclamation, call the mayor’s secretary to make sure it is ready, then go to the 2nd floor of City Hall to pick up final copy.

Mayor Bill Bell:

- Phone: 560-4222
- Fax: 560-4801
- E-mail: bbell@ci.durham.nc.us / cc: ewright-corbett@ci.durham.nc.us
KIOSKS

The DCVB has a total of three kiosks designed with graphic panels and pockets to hold collateral. Two “Permanent” kiosks are located in The Marriott At The Durham Civic Center and at the Sheraton Imperial Hotel & Convention Center.

- The Kiosk at the Civic Center is stocked with materials by the VIC staff and delivered weekly by our courier. The Kiosk at the Sheraton is stocked bi-weekly by either the VIC staff or the Event Services Assistant.
- When anticipating use of the kiosks by large groups, notify the VIC staff so they can deliver extra. (This may be set up immediately as an e-mail scheduled to be sent 2 weeks from the convention date.

The third kiosk is an outdoor kiosk, which will be used for festivals, community or special events. It will be the responsibility of the Assistant Director of Visitor Services to maintain (stock) and schedule it, but assembly will be managed by The Godfrey Group, its manufacturer. Call Godfrey Group at least 2 weeks in advance to schedule delivery. ADVS should meet the Godfrey Group representative to handle placement of the kiosk, initial stocking and dealings with the hotel/festival staff, etc. Before the kiosk is dismantled, ADVS should retrieve collateral.

To Schedule Outdoor Kiosk:

Call Client to see when they want Kiosk and to confirm their set-up and tear down Time Line. The outdoor Kiosk is usually used for festivals which have strict set-up and tear down hours.

Contact Leah with Godfrey to schedule a time and place for The Godfrey Group to set up Kiosk. The ASVS should be at site to help Godfrey set-up, but will not be responsible for actual Kiosk Assembly. VIC staff are responsible for stocking the Kiosk with collateral before event and for re-stocking through-out festival/event. After the event, the ADVS is responsible for meeting The Godfrey Group Staff to assist with tear down. The Godfrey Group is responsible for storing the Kiosk between events.

Godfrey Group Phone number is 544-6504

Criteria for setting up Outdoor Kiosk at Durham Major Annual Festivals

- Minimum participation of 2,000
- Not a multiple location event (e.g. ADF)
- Signature or Core Event
**Transportation Request For Proposals (RFP)**

As a service to meeting planners, DCVB assists with obtaining transportation for meeting delegates. While a specific RFP is issued for each group based on their specifications, DCVB annually (January) requests estimates from Durham charter bus/shuttle transportation providers.

Download the current list of transportation providers from D3K: Pull by using Minor Code ‘Trans-Bus’ and print envelope/labels.

Close D3K and open Word.

Open File: G:\w\forms\sales-service\TRANSRFP-FRM.doc and make edits in the date issued, sender name, and the date a response is requested.

Print out enough copies of generic memo to send one to each provider (check the number of labels pulled). Print (or copy) first page on DCVB letterhead.

Stuff envelopes with memo and send out. Follow up calls should be made to Southern Coach and Lighthouse International if responses are not received from them. Other transportation companies have not responded in past years (as of 12/98).

Director of VS maintains hard copies of the RFP’s on-line and in a hard file.

---

**Voice Mail Scripting for City-Wide / Large Events**

To assist in promoting special events in Durham, DCVB can add information pertaining to a specific event to the “Bullhorn”. Before discussing this possibility, it must be networked through the VP of Operations as it must be significant enough to warrant the addition to our Bullhorn message.

The information can be accessed via the Bullhorn Number: 1-800-772-Bull or 688-BULL and pressing the number as indicated in the Bullhorn message. (Verify that message has been recorded on both lines – it is done separately!)

Wording is generally taken care of by Thomas (he does the recording), but the Event Services Assistant should provide information that should be included in the message. Wording may be borrowed from promotional materials provided by the planner/association.

Sample Bullhorn Message for 1999 Special Olympics:

“Experience the thrill of the 1999 Special Olympics World Summer Games, the largest sporting event in the world in 1999, being held in Durham and the Triangle Region of North Carolina from June 26 – July 4, 1999. Join in an International Celebration as 7,000 athletes with mental retardation and closely related developmental disabilities from 150 countries around the world compete in 19 sports, ranging from sailing to softball and from a grueling marathon to gymnastics. For information on housing call, ______________. Or you may fax them at ________. For general information, please call ________________. We look forward to welcoming you to Durham for this special event.”

---

**Convention Services Directory Instructions (CSD)**
NOTE: The CSD project was consolidated into a single Access pull from D3K to avoid manual edits and provide a faster means of getting current data into a publication. Because the report is generated by Access, there IS NOT a means to manually edit the print-out. However, the instructions below will explain how text may be modified to achieve the desired effect.

There are various components of compiling a CSD:
1) Defining what will be in the publication and how it will be grouped.
2) Identifying businesses and organizations that belong in the CSD.
3) Including/updating text that describes an organization.
4) Printing the report itself.

To access all components described below, open Destination 3000 and from the main screen, open DCVB | CONVENTION SERVICES DIRECTORY to get to the following option form:

<table>
<thead>
<tr>
<th>subcatID</th>
<th>CatSub</th>
<th>CatMain</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ADPRAG</td>
<td>ADVERTISING AND PUBLIC RELATIONS</td>
</tr>
<tr>
<td>2</td>
<td>Gradelin</td>
<td>ADVERTISING AND PUBLIC RELATIONS</td>
</tr>
<tr>
<td>3</td>
<td>Ad-Spec</td>
<td>ADVERTISING AND PUBLIC RELATIONS</td>
</tr>
<tr>
<td>4</td>
<td>AV-Comp</td>
<td>AUDIO/VIDEO/SLIDE PRODUCTION SERVICES</td>
</tr>
<tr>
<td>5</td>
<td>BABYSIT</td>
<td>BABYSITTING SERVICES / RESOURCES</td>
</tr>
<tr>
<td>6</td>
<td>Cate-FS</td>
<td>CATERERS</td>
</tr>
<tr>
<td>7</td>
<td>Cate-TO</td>
<td>CATERERS</td>
</tr>
<tr>
<td>8</td>
<td>CourtRep</td>
<td>CONVENTION &amp; COURT REPORTERS</td>
</tr>
<tr>
<td>9</td>
<td>ADA</td>
<td>DISABLED ACCESS TRANSPORTATION/DISABILITY</td>
</tr>
<tr>
<td>10</td>
<td>Ent-Agent</td>
<td>ENTERTAINMENT</td>
</tr>
<tr>
<td>11</td>
<td>Ent-DJs</td>
<td>ENTERTAINMENT</td>
</tr>
<tr>
<td>12</td>
<td>Ent-Perf</td>
<td>ENTERTAINMENT</td>
</tr>
<tr>
<td>13</td>
<td>ExDesign</td>
<td>EXHIBITS</td>
</tr>
<tr>
<td>14</td>
<td>ExService</td>
<td>EXHIBITS</td>
</tr>
<tr>
<td>15</td>
<td>Florists</td>
<td>FLORISTS</td>
</tr>
<tr>
<td>16</td>
<td>PlantFax</td>
<td>FLORISTS</td>
</tr>
<tr>
<td>17</td>
<td>Ret-Final</td>
<td>FORMAL WEAR</td>
</tr>
<tr>
<td>18</td>
<td>RET-GIFT</td>
<td>GIFT ITEMS &amp; AMENITIES</td>
</tr>
<tr>
<td>19</td>
<td>MED-DAILY</td>
<td>MEDIA</td>
</tr>
<tr>
<td>20</td>
<td>MED-WEEK</td>
<td>MEDIA</td>
</tr>
<tr>
<td>21</td>
<td>MED-MONTH</td>
<td>MEDIA</td>
</tr>
<tr>
<td>22</td>
<td>MED-RADIO</td>
<td>MEDIA</td>
</tr>
<tr>
<td>23</td>
<td>MED-TV</td>
<td>MEDIA</td>
</tr>
<tr>
<td>24</td>
<td>AIR-AMB</td>
<td>MEDICAL SERVICES</td>
</tr>
<tr>
<td>25</td>
<td>AMB-SERV</td>
<td>MEDICAL SERVICES</td>
</tr>
</tbody>
</table>

Defining the CATEGORIES AND GROUPING LEVELS WITHIN THE CSD

The CSD is comprised of businesses that serve the
needs of meeting planners. Minor category codes from D3K have been identified as the types of organizations to include. These codes have been added to a table in Access with the current codes, but is editable by the end-user from the D3K interface by clicking on the first option button with the label “EDIT CSD CATEGORY GROUPS.”

The column entitled “CatSub” contains pre-defined Minor Code categories from D3K. These codes are managed and edited by our Data Management division. These codes make up what you will see in the final report as your subcategories—the actual description for the codes is pulled into the report. Edits to the text at the subcategory level can only be achieved by editing the text of the minor code descriptions, which must be networked through Data Management.

The Cat Main column contains the larger groupings as we see them in the CSD. The text in these fields will appear on the report EXACTLY as you have them in this table. They may be edited as desired. Each Sub Category MUST belong to one of these major groupings in order to appear in the CSD. If the Main Category text is changed, it needs to be changed in all other cells where the same grouping is to be applied.

New minor category codes and new major grouping levels may be added to this table to edit the CSD. Minor codes must be entered EXACTLY as they appear in D3K and a corresponding grouping level always needs to be added to update where it belongs in the report. Organizations will be sorted alphabetically within each subgroup, which is alphabetical within each major grouping, which in turn, is alphabetical within the overall report.

CHECKING FOR OTHER ORGANIZATIONS THAT MAY NEED TO BE INCLUDED IN THE CSD:

Because the D3K database is constantly being updated, it is easy for someone to forget to include/code an organization to be in the CSD. A query has been developed that will pull all codes that are in the table described above, check to see if the organization has a Durham zip code, and then check to see if it has the Minor Code of PUB-CSD assigned to it. The ones not assigned with the code will be identified in the list by organization name and Organization ID so that it may be checked and assigned, if appropriate.

TEXT / DESCRIPTIONS for CSD:

Each organization has a field in its detail sub-form that allows users to enter descriptive information about the company. In most cases, this information is desirable to include in the CSD publication – but not always.

To date, all information has been copied from the IP Details sub-form for all house records with the PUB-CSD code to a completely separate field under the sub-form “PUBLICATIONS”, which is accessed in the same set of control buttons as the detail sub-form. This text may be adapted to better suit the needs of the CSD and keep it more secure from edits that may not be appropriate for the publication.

However, to avoid having to re-key or cut and paste new information that is added after the initial design, the third button on the Convention Services Directory selection form allows the user to update ONLY those publication text fields that are empty with information that may have since been added to an organization’s detail form. This will NOT overwrite text that is already in the publications field and will (intentionally) not pick up edits. To perform this function, click on the third button on the form and WAIT. It will prompt you that you are about to update XX number of records. Answer ‘yes.’ After running this update query, review all of your CSD records in the printed report to make sure you want ALL of the details that were added to the organization’s detail form for the CSD and make appropriate edits at the publication text level.
PRINTING/PREVIEWING THE CSD REPORT

All pages of the Convention Services Directory automatically have the Durham Convention & Visitors Bureau identifier across the bottom, as well as the page number AND the current year. Simply press the button to print the report and you may review in print preview mode. Close out of the report if necessary changes are required and re-open to view the report with the needed changes.

Print the document, duplex the pages (copy onto front and back sides of paper) and then update the Table of Contents (g:\w\Forms\Sales-Service\Services\CSD Contents) to correspond with the page numbering of the newly created report. Order CSD covers & backs from the Communications department.

If Convention Services Directory loses its formatting, go to FILE/ PAGE SETUP and set the formats to the following:

![Page Setup Dialog]

Margins (all) = .208
MINT REPORTS

MINT's function is to provide records on past and future trade shows and meetings of virtually every major U.S. association, some non-US. associations and a number of major corporations. This system allows for the rapid reporting and exchange of convention reports among participating cities. However, this information is only as good as the information provided by the joint cooperation of convention and visitor bureaus internationally. Thus, each convention and visitor bureau must regularly report all meetings that meet MINT's criteria.

The DMAI MINT database represents data on more than 20,000 associations.

The Convention Services manager is responsible for reporting bookings meeting DMAI criteria. There are two separate reports to create:

- **Calendar and Future Bookings**

DMAI requires that all Convention & Visitors Bureau send a complete convention calendar by January 15.

Have 50 peak room nights or more
Are repeatable, regularly-occurring meetings
Rotate outside of the state

Once this report is generated from D3 into the excel spreadsheet, send to mint@iacvb.org. Be sure that the mint code is entered:

**DMAI (MINT) REPORTING**

As of 2003, DMAI requires bureaus to provide their annual reporting of upcoming meetings in an Excel format. The report also requires the inclusion of DMAI's org number and meeting number.

Thus, two new fields have been added to the Sales organization main form and meeting form (see next below).

Historically, these ID numbers have not been tracked by DCVB. DCVB staff responsible for
reporting annually to DMAI will need to export a spreadsheet from D3K and then look up the ID numbers on the DMAI website and fill them in on the spreadsheet prior to sending to DMAI. Once the ID number and meeting number are obtained, they should also be added to D3K to save having to look these numbers up again in the future.

**To pull reports:** Open D3K / Group Sales / Reports / Convention Services Reports.

PCR Report – provides form that can be sent out to Durham properties indicated as host for DMAI reportable meeting.

MINT Report – exports data to Excel for editing (adding DMAI ID numbers) and extracting records that should not be sent to DMAI.

Criteria for DMAI reportable meetings:
- Must be a reoccurring meeting
- Must be 50+ peak room nights
- Must rotate within the State/Region or Nationally
- Must be international, national, or regional in scope.

Enter the meetings into the MINT Database and record the MINT Org # & Mtg #, in D3. Send the completed excel file including the MINT org & meeting #’s to mint@iacyb.org.

Post Convention Report
For those meetings that fall into DMAI’s reporting criteria, a report, called a ‘PCR’ is sent to the HQ Hotels, during November for meetings reported the previous January for the year.
Include all meetings that were reported in the convention calendar (January)
Include any meetings that have been reported or booked (and have occurred) since the convention calendar was printed that meet the criteria.

To pull the report forms, open D3/Sales/Reports/Convention Service Listings/MINT PCR report, when the information comes on the screen, select print to the BW printer. Note: The PCR’s need to be screened by the Director of Services as many of the MINT Parameters cannot be fully filtered by D3.

MINT Parameters are: More than 50 room nights, able to rotate outside the region and are repeatable, regularly occurring meetings.

**Instructions:**
Issue form to hotels to complete, requesting information on room pickup, size of meeting rooms used, and meals, etc. Make sure this is issued to any overflow properties used by the group, as well, for the sleeping rooms occupied. (G:\w\forms\PCR.frm)
Gather all reports and obtain access to MINT computer for submission.

**DMAI MINT Instructions**

As of July 1, 1998, DMAI launched its new Internet-accessible MINT database.

DCVB participates in a Regular Subscription Option which allows on-line usage, but incurs charges for data viewing, printing, query downloads, and query viewing.

**Data View Menu**

Data View charges via the Internet are based on viewing the various individual sections of a single organization profile.

**Per View**
To view/print a single history from a meeting $2.50 per history selected
To view/print/download a formatted PCR $5.25 per PCR

Query Processing

1. **History Report View:** Query Processing charges for "PCR View" are based on viewing individual PCRs for meeting profiles that were the results of a specific criteria entered by the user.

   History Report View (PCR) $0.36 per profile

2. **Data Download:** Charges for Data download via the Internet are based on the number of records and sections selected for download. Data downloaded will be in Comma Delimited, Microsoft Excel, or Microsoft Access format. The MINT system will download "Organization" and "Meeting Demographic" sections by default.

   - Organization & Meeting Demographic $0.06
   - History Information $0.20
   - Booking Information $0.10

MINT is a useful tool that should be used, but based on the associated costs, it should be used with discretion and a clear purpose.

******

To access the MINT program on-line, open the Internet Explorer/Navigator

On the ‘Go To: ‘ line type [http://www.iacvb.org/iacvb/index.asp](http://www.iacvb.org/iacvb/index.asp) and press <enter>

Once you access the DMAI home page, scroll with the vertical button bar to the left of the screen and double-click on ‘MINT Program & Manual’ and select ‘MINT’
At the Log in page:
In the Bureau field, type “Durham”
For User ID, enter user name (must be all caps)
Password: ****** (all caps)
Click on the ‘Submit’ Button

The MINT System is accessible only by those who subscribe to it through IACVB.

Before entering information on an organization, the user must first determine if the organization already exists in the database or whether an entirely new organization must be created:

**HOW DO I SEARCH FOR AN ORGANIZATION?**

Using the organizational search tool, on the left-hand side of the MINT page, you can do a key word search of the organization’s name or acronym, or you can search using the organization’s code.
A list of organizations will appear, scroll through the list until the organization you are looking for shows.

Click on it to open org. information page.
(If the organization DOES NOT exist within the MINT database, follow the instructions listed next.)

ADD/EDIT ORGANIZATION

HOW DO I ENTER A NEW ORGANIZATION?

1. Always make sure the organization is not already in the MINT system by doing a key word search.
2. If the organization is not found, select the black Add Organization icon from the upper right hand corner of MINT search page.
3. Enter all the required fields for the organization’s contact information.
   a. Do not use punctuation (i.e. MR.) or abbreviations.
   b. Do not forget to enter the URL (organization’s website).
4. Press Save Information. This should bring you to the Meeting information page.
5. Enter all fields that are required.
   a. Do not put meeting year in meeting name
   b. In meeting region, if state is selected, please highlight at least three states in the State/Province section. To highlight multiple states, hold down the control key while selecting the desired states with your mouse key.
6. After all required fields are filled in, press the continue key. You will then be asked to enter either history or booking information. Select the appropriate record.
7. To enter a history, fill in all the required fields.
   a. Do not use commas in the numerical fields (i.e. 1,000 should be 1000)
   b. Unlike the CINET system, Gross and Net Square Feet should have all the necessary zeros (i.e. 100000).
8. To enter a booking, fill in all the appropriate fields.
9. When history or booking information is completely entered, press save information. Again, you will be asked to enter either history or booking information (this is for bureaus who would like to enter multiple bookings). At this point, you are done entering your new organization. To double check to see if the information was accepted into buffer, please go to the system tools drop down menu, and select "pending buffer records." This will show you what is in the buffer, however, you cannot alter the information that has already been sent in.

Please note that your entry is not automatically entered into the system. It passes through a quality check point, called the Buffer. IACVB staff reviews the information that you have entered and will either accept the data, reject it so that you can make the appropriate corrections to the file, or will discard it, which is only done if the record is a duplicate.

To add a new meeting follow the instructions on the next page.
HOW DO I ENTER A NEW MEETING?

1. Do a search for the appropriate organization in the system.
2. In the organization information page, select the black Add Meeting icon on the upper right hand corner of the page.
3. Enter all fields that are required:
   a. Do not put meeting year in meeting name.
   b. In meeting region, if state is selected, please highlight at least three states in the State region. To highlight multiple states, hold down the control key while selecting the desired states with mouse key. Please note, US/CN means US/Canadian region, NOT US Central region.
4. After all required fields are filled in, press the continue key. You will then be asked to enter either history or booking information. Select the appropriate record.
5. To enter a history, complete all the appropriate fields:
   a. Do not use commas in the numerical fields (ie. 1,000 should be 1000)
   b. Unlike the CINET system, Gross and Net Square feet should have all the necessary zeros (ie. 100000).
6. To enter a booking, complete all the appropriate fields.
7. When history or booking information is completely entered, press save information. Again, you will be asked to enter either history or booking information (this is for bureaus who would like to enter multiple bookings). At this point, you are done entering your new meeting. To double check to see if the information was accepted into buffer, please go to the system tools drop down menu, and select "pending buffer records." This will display what is in the buffer, but you cannot alter the information that has already been sent in.
Add a New Booking

HOW DO I ENTER A BOOKING?

1. Do a search for the appropriate organization in the system.
2. Identify the appropriate meeting in the drop down menu.
4. Complete all the required fields, and press Save booking.

Bookings are entered in MINT prior to the meeting date.
(HISTORIES are recorded AFTER the meeting and require more detail).

Note: MINT will not allow entries for bookings after the meeting date has already passed – full history information is expected after the meeting has taken place!

All bookings for the upcoming year are due to DMAI no later than January 15th. This can be done by printing a booking report from Bureau 2000 and highlighting the groups that meet the criteria or by keying them into the MINT program on-line. Meetings booked within/for the same calendar year should be submitted on a monthly basis by adding them on-line.
Adding a History

HOW DO I ENTER A HISTORY?

1. Do a search for the appropriate organization in the system
2. Identify the appropriate meeting in the drop down menu. Press Go
3. Under the History drop down menu, highlight Add History and press Go. If you have entered a booking for this meeting, PLEASE make sure that you are entering the history under the same meeting code. This will ensure that you do not get delinquency notices for histories that you have already entered. Complete all the required fields, and press Save history. Do not use any punctuations when entering information (e.g. no commas or periods). For gross square feet and net square feet, please write out the entire number value, with no commas (i.e 10000).

Please note that your entry is not automatically entered into the system. It passes through a quality check point, called the Buffer. IACVB staff reviews the information that you have entered and will either accept the data, reject it so that you can make the appropriate corrections to the file, or will discard it, which is only done if the record is a duplicate.
MINT REPORTING RULES

WHAT IS THE CONVENTION CALENDAR AUDIT?

In order to ensure that the MINT database is the most comprehensive meeting calendar in the world, IACVB requires that each subscriber submit their entire convention calendar for review by January 31 of each year. The calendar must be submitted in an electronic format, either as a comma delimited text file or an excel file. The calendar is then compared with the future bookings that have been added to the MINT system. MINT Subscribers will receive a rating based on the matching percentage. MINT subscribers will also receive a rating based on the number of histories added in the previous year. Please see the Calendar Audit section for more information on this process.

WHAT IS A REPORTABLE MEETING?

A meeting must meet the following three requirements in order to be accepted into the database:

- It uses 50 or more rooms on the peak night.
- It is held on a regularly scheduled basis.
- It meets in three or more states and can be solicited.

WHEN SHOULD I REPORT MEETING HISTORIES FOR MEETINGS THAT HAVE OCCURRED?

History reports must be submitted no later than 60 days after the end of the month the meeting ended. For example, a report for a meeting that ended January 15th, is due April 1.

For a more detailed list of instructions, go to: