

# VISITOR PROTOCOL

*The following is a guide for when notification of an upcoming visit has been received. If you have any further questions, please contact External Affairs & International Relations at [vpinternational@concordia.ab.ca](mailto:vpinternational@concordia.ab.ca) or 780-479-9234.*

## **Intent**

**The intent of the Concordia Visitor Protocol is to ensure external visitors including but not limited to dignitaries, government officials, international delegations, visiting universities, donors and potential donors are handled with appropriate and relevant treatment according to what is customarily expected for the visiting party.**

## **PART 1-PLANNING**

### **Initial Planning**

- A main contact person at CUE must be identified. This person would normally be in charge of the event from start to finish (including planning, overseeing and follow-up/debrief/improvements). This individual will act as the sole event coordinator and is responsible ensuring all tasks associated with the event are delegated and completed.
- A familiar and working knowledge of institutional protocols associated with visitors is necessary.
- If the visit does not originate within External Affairs and International Relations, the department of External Affairs and International Relations must be made aware of the visit to CUE campus as early as possible in the process.
- Review the purpose of the visit during initial screening to ensure that there is a legitimate or return value to the university (institutional reputation, etc.)
- Book date and time in calendar (Google calendar)
  - Confirm facility is available for proposed time(s).
  - Coordinate who will be involved including the department(s), Marketing & Communications department and President's Office.

## **Initial Notification**

An initial notification of the visit should be sent out to all necessary persons regarding the visit. These persons will include the CUE President, the CUE VP External Affairs & International Relations and the departmental VP. All other persons to include in the initial notification and subsequent invitation are at the discretion of the above parties.

Initial Notification should include the following:

- Title & name of lead visitor
- Title & names of accompanying guests
- Date & time of visit
- Reason for visit
- Notification of upcoming Google Calendar invitation(s)
- Request for RSVP (to be answered via Google Calendar invitation[s])
  - Personalized letters, e-mails or phone calls may be required.
  - In the case of inviting Elders, calling is required. Arranging for elders must go through the Indigenous Knowledge & Research Centre.

## **Guest Expectations**

- Based on the reason for the visit, meetings between the guest (or their representative, Executive Assistant, etc.) and CUE representatives should be arranged accordingly.
- Is the President required?
- Is the presence of Elders required?
  - Arranging for Elders (and the cost for Elders to attend) goes through the Indigenous Knowledge & Research Centre. Always contact with IKRC regarding the protocols for elders.
- Other meetings can be arranged based on visitor's interest or expectations.
- The visitor should arrive in Edmonton on or before the day prior to their visit at CUE.
- A representative from CUE should meet the guest and welcome them to Edmonton. Before their arrival, you should request the following information:
  - Flight information (both arrival and departure)

- Hotel information
- Vehicle requirements or arrangements
- Licence plate number (if/when available and if complimentary parking is to be provided)
  - Complimentary parking is provided at the discretion of your department. If you have questions regarding when complimentary parking should be received, please contact your department head.

### Other Protocols

- Other protocols may be required as identified by guest (ex: guest must be announced, be addressed by a particular title, etc.).
- For cultural customs and etiquette, please refer to the External Affairs & International Relations office before any planning. The Canadian government provides a webpage for cultural customs and etiquette. Please refer to *Country Guides & Profiles* found at: <https://www.kwintessential.co.uk/resources/guides/>. Please refer to the office of External Affairs & International Relations before any planning.
- If Elders are attending:
  - Connect with the Indigenous Knowledge and Research Center for all matters regarding Elders.
  - Please ask the Indigenous Knowledge & Research Centre what Elder protocols are for speaking upon scheduling their attendance.
  - Tobacco should always be offered (tin, tie or cigarettes) in exchange for speaking or prayer. Some Elders might not acknowledge tobacco and may not accept it, but we should offer nonetheless.
  - Prayer cloth, sweet grass or other medicines may be required.

### **Coordinate Personnel & Supplies**

*Please reference the resources available for event and meeting planning on Alfresco under [Employee Resources/Event and Meeting Planning Information](#).*

### Conference Services:

- Contact Conference Services in order to secure desired space and necessary equipment on campus.

- Equipment:
  - Round/rectangular tables
  - Tablecloths
  - Microphone, podium, mic stand
- Room:
  - Conference room
  - Classroom
  - Public area (Tegler)
  - Green room (if needed)
  - Please note any additional facility costs will be charged to the requesting department.

### Catering:

- Contact Aramark for catering needs on-campus:
  - Determine which locations catering is needed.
    - One location
    - Multiple locations
    - Green room
  - Plan menu ahead of time and determine what type of food service is appropriate.
    - Basic: refreshments such as juice, water, coffee, and tea
    - Intermediate: baked goods, snacks, appetizers (including refreshments)
    - Advanced: full meal (including refreshments)

### Security:

- Inform security of all those involved (including people in attendance and/or assisting an event).
- Please note additional security costs will be charged to the requesting department.

### Marketing:

- Contact the Marketing Department to request a media package (including social media coverage) with a media sign-in sheet at event.
  - Make arrangements for photographer to be present for event.

- Confirm CUE promotional materials (banner, swag) are available for date needed.
  - Request visitor gift(s) if appropriate
    - Please refer to the [Gift Expenditure Policy](#) before choosing gifts

#### Finance:

- Make sure cheque requisitions are requested well in advance for required expenditure cheques.

#### Itinerary/Agenda:

- Depending on the type of visit, an itinerary or an agenda will be required.
  - Itinerary
    - If there are off-campus activities planned for the visitor, an itinerary is required. This type of schedule should include both off-campus activities and on-campus activities. An itinerary should be planned within a reasonable time frame, allowing for traffic, travel time, and time for necessary meetings.
  - Agenda
    - If the schedule consists of only on-campus activities, an agenda is required. This type of schedule should be planned within a reasonable time frame, including time for necessary visits, meetings and time required to get to each meeting.

#### Minutes/Notes:

- Are minutes or notes required for the meeting?
  - Identify what type (if any) are needed
  - Identify, contact and confirm with the responsible party
  - The responsible party should be one who is familiar with the subject matter that is being discussed.
    - If the meeting is regarding cooperation within a specific department, the responsible party should be from within the specific department.
    - If the meeting is regarding cooperation with a specific Faculty, the responsible party should be from within the Faculty.

- If the meeting is regarding general international cooperation, the responsible party should be within External Affairs and International Relations.

## **Day-Before Preparations**

### IT (Prep):

- Contact IT to ensure all necessary technological equipment is available and working.
  - Ensure quality control for presentations
  - Use CUE logo
  - Sound/light check
  - Projector (built-in)
  - Conference phone check

### Conference Services (Prep):

- Contact Conference Services to ensure all provided equipment is working before event.
  - Microphone/stand
  - Projector (portable)

### Location (Prep):

- Have a green room in close vicinity of the event (to prepare visitors and in-house personnel).
  - Provide separate beverages/snacks for guests in the designated green room.
- Reserve a welcome table for event information including but not limited to CUE information (may be program specific) and media packages.
- Acquire mandatory CUE banner or logo promotion from Marketing.
- Ensure that the CUE logo is visible in the surrounding area:
  - If media coverage (i.e. filming/photography) is present.
  - If guests are set to interact with staff, faculty, administration and/or students (i.e. photo ops).

### Rehearsal:

- Rehearsal may be necessary depending on the complexity of the event, especially when involving technology.
- Rehearse the event schedule at least one week before to ensure that no unexpected issues arise.
  - Make adjustments to improve the flow of the event, if need be.
- Presentations should be practiced in advance. They should be:
  - Brief and to-the-point
  - Engaging, relevant and of interest to your observers
  - Special attention should be paid to who is considered the intended audience.
  - All technical support must be in place and tested prior to presentation.
  - PowerPoint presentations should use the institution's template which can be found on Alfresco at [Employee Resources/Logos, Stationery and other forms](#).

#### Speech/Presentation:

- All formal speeches or presentations should be prefaced with the Treaty 6 acknowledgment:
  - "I will start by acknowledging that the land on which we gather is Treaty 6 territory and a traditional meeting ground and home for many Indigenous peoples, including Cree, Saulteaux, Blackfoot, Métis, and Nakota Sioux Peoples."
- All formal speeches or presentations should end with the following phrase:
  - "At CUE, we can sit in the back, but someone will always invite us to the front."
- Prepare for all formal introductions to be made at the start of each event. Be sure to include all necessary introductions such as the President, Vice President, Dean/Director of Program, Elder, Chief, Councillor, Justice, etc.
  - If unsure of correct title or introduction, please contact External Affairs or the President's Office for clarification.
- Identify the exit points in case of emergency and identify any other applicable safety information.

## PART 2-EVENT DAY

### Day-Of-Event

Arrive at least one hour prior to the official start of the event to ensure that all pre-planned preparations/personnel are accounted for.

- Welcome and direct guests accordingly upon arrival (assign a greeter).
- Secure parking for guests by either registering their vehicle licence plate number before or upon arrival to campus.
- Begin program with the Treaty 6 acknowledgment and all applicable introductions as rehearsed.



## VISITOR PROTOCOL CHECKLIST

### Responsibilities of Main Contact for Event:

- Confirm President and VP EAIR are aware of visit/event
- Confirm meeting date and time
- Send notification of visit email to all invited CUE attendees
- Coordinate who will be involved, including the receiving department, the President's Office, External Affairs and International Relations, and Marketing & Communications.
- Book meeting space
- Book green room
- Confirm attendees' names and titles:
  - o Visiting attendees
  - o CUE attendees
- Organize list of attendees
- Confirm program elements:
  - o Food/drink on site
    - Basic
    - Advanced
  - o Food/drink offsite
  - o Speakers/speeches
  - o Note-taker (if needed)
  - o Rehearsal (if needed)
  - o Review/correction of speeches
  - o Schedule campus tour (either with your department or Recruitment)
  - o Schedule photographer (with Marketing & Communications)
- Confirm materials and/or equipment required:
  - o Technical (podium, computer, slideshow setup, etc.)
  - o Conference phone call
  - o Presentation (PowerPoint, USB)
  - o Banners
  - o Flowers
  - o Flags
  - o Print materials (About CUE, view book, folders, booklets, etc.)
- Gifts required:
  - o Please refer to the [Gift Expenditure Policy](#) before choosing gifts
  - o Have they received a gift before?
    - If so, what?

- Is a company/corporate/institutional gift required?
- Special guest gift
- Individual gifts for remaining delegation
- Protocol for Elders, Knowledge Keepers or Cultural visitors (eg. Tobacco, sweet grass or prayer cloth)
- Prepare timeline for visit and outline of event
- Provide parking for special guests as determined by department