Meeting and Event Policy TEMPLATE
by Debi Scholar

Introduction to the Meeting and Event Policy Template

Policies are one of the numerous components that make up a corporate culture. Every corporate culture is different.

Corporate cultures are usually either:

a) flexible, discretionary and dynamic, or
b) stable, orderly and controlled.

Some organizations use “guidelines” while others use “policy.” Common differences are:

<table>
<thead>
<tr>
<th>Meeting Guidelines (not mandated)*</th>
<th>Meeting Policy (mandated)*</th>
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<tbody>
<tr>
<td>May use the word “guideline” for legal reasons</td>
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<tr>
<td>Loosely controlled until an environment factor drives need (e.g. cost containment, legal or other type of incident occurs, risk exposure)</td>
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<tr>
<td>Few consequences for noncompliance</td>
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<tr>
<td>The word “policy” often requires the organization to maintain control and report non-compliance</td>
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<tr>
<td>Policy reviewed regularly</td>
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<tr>
<td>Automated processes to monitor compliance</td>
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<tr>
<td>Consequences for noncompliance</td>
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<tr>
<td>Less confusion as to acceptable versus non-acceptable behaviors</td>
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*Typical definitions – your organization may use different descriptions

The organization must provide a comprehensive set of policies/guidelines, offer the negotiated prices, provide a foundation for seamless processing, and communicate expectations to the meeting sponsors, attendees and suppliers. In turn, the meeting sponsors/requesters, attendees and suppliers must take responsibility to learn the policy and stay within those boundaries.

<table>
<thead>
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<th>Policy Responsibilities</th>
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<td><strong>Organization/Leaders</strong></td>
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<tr>
<td>Set strategy and policy</td>
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<tr>
<td>Provide technology</td>
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<tr>
<td>Enforce/monitor compliance</td>
</tr>
<tr>
<td>Enforce comprehensive set of standard operating procedures that support the policy</td>
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The following pages contain Meeting and Event Policy language that may be edited for your culture and environment. The template is filled in with acceptable language rather than “blank fields” for ease of reading and understanding. Your organization may have different processes, preferences and language. In that case, the template is designed to be a “checklist” of items to consider as you create or edit your Meeting and Event Policy.

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The Meeting and Event Services (“MES”) team provides the organization with expert services in site selection, contract negotiations, attendee management, planning/onsite services, and paying invoices for meetings and events. The MES team manages virtual meetings (TelePresence, videoconference, webcasts, webinars) for meetings that are larger than 50 people and are not self-service. The MES strategic meetings management services provides for superior meeting quality, consistency, accountability and risk mitigation while allowing for flexible, creative solutions.

1. MES Services

   1.1 MES provides:

   1.1.1 Meeting/event cost estimates, site analysis and selection, contract negotiation and signing authority, contract document retention, pre-planning and onsite meeting services, attendee management, group travel and ground transportation services, content creation, selecting and securing suppliers, offsite activities, audiovisual and production services, speaker management, collateral and incentive services, meeting/event payment services, reporting, technology automation, and virtual meeting support;

   1.1.2 Collateral services such as creation of brochures, signage, name badges and agendas. For more information, please see the MES portal;

   1.1.3 AV/production support services. For more information, please see the MES portal;
1.1.4 Support for content creation, e.g. selecting speakers and team-building activities. For more information, please see the MES portal; and

[Note to reader: any services that are in-scope for meeting planners, list them so that the readers know what types of services they can expect].

1.1.5 Professionals in meeting sourcing, negotiating, contracting and planning will be assigned to manage the meetings. For more information on the meeting professionals, please see the MES portal.

1.2 These services allow the organization to:

1.2.1 Experience high-quality meeting services and provide meeting sponsors with return on investment information;

1.2.2 Manage legal and regulatory requirements such as capturing meeting spend so that general ledger accounts with meeting/event spend contain the data necessary to maintain fiscal responsibility and pass audit activities;

1.2.3 Track and manage supplier relationships and report spend with diverse businesses; manage supplier service level agreements;

1.2.4 Ensure that the organization's legal language is inserted into all contracts; provide the appropriate level of contract signature authority;

1.2.5 Manage the penalty credits across the organization so that penalty credit loss is monitored and credits are used before expiration;

1.2.6 Ensure that business continuity plans exist for all meetings/events and suppliers; ensure that crisis management plans exist for all offsite meetings/events; provide duty of care responsibilities for all organization employees;

1.2.7 Use professional planning resources to streamline processes, gain efficiencies, and offer superior quality to the organization's meetings/events; ensures that the organization's travel, procurement and meeting policies are integrated, communicated and used;

1.2.8 Use the organization's branding requirements for all applicable meetings/events;

1.2.9 Ensure that the organization's corporate social responsibility initiatives are embedded into the meetings/events; and

1.2.10 Provide a single technology application that is used across the organization and manages all meetings/events, offers automation to gain efficiencies, streamlines property procurement activities, allows for budget/actual spend controls and simplifies attendee management.

2. Expectations

2.1 Meeting Sponsor/Requester/Budget Holder

2.1.1 It is expected that the meeting sponsor/requester/budget holder will ensure that all meetings/events are aligned with the organization’s strategy and business goals.

2.2 Attendees

2.2.1 Meetings/events are costly to the organization and imperative for business success. It is expected that attendees will focus on the business objectives of the meeting and reduce distractions.
3. Meeting and Event Services Policy (“Policy”) Definition

3.1 Policy

3.1.1 The Policy applies to all meetings/events that include one of the following four characteristics:

3.1.1.1 Meeting/event are expected to cost over $10,000 USD (or applicable currency);

3.1.1.2 Meeting/event includes 10 or more attendees;

3.1.1.3 Meeting/event is held offsite, or off of the organization property; if the meeting/event is held at a residence and if alcohol is served, the Policy applies; or

3.1.1.4 Meeting/event results in any type of contract exchange and signature. (Note to reader: if a small meeting service or technology is in place, this may not be necessary for contracts under a certain threshold because small meeting contracts may have already been negotiated)

Note to Reader: Determine how small meetings requirements and tasks will be incorporated into the Meeting Policy.

3.2 Staff scope

3.2.1 The Policy must be adhered to by all employees of all business units, speakers who are speaking on behalf of the organization, consultants, contractors and suppliers who are traveling on behalf of, and funded by the organization.

3.3 Meeting and Event type

3.3.1 The Policy must be adhered to for all meetings such as:

3.3.1.1 Breakfast, lunch or dinner gatherings (at a contracted property or a person’s residence if there is alcohol served and the organization is funding it);

3.3.1.2 Client/sales meetings or events;

3.3.1.3 Incentive meetings or events;

3.3.1.4 Marketing meetings or events;

3.3.1.5 Sponsorship activities;

3.3.1.6 Recruiting meetings or events;

3.3.1.7 Special events/team outings;

3.3.1.8 General business meetings;

3.3.1.9 Project team meetings/events

3.3.1.10 Training meetings;

3.3.1.11 Conferences or congresses; or

3.3.1.12 Virtual meetings held on-site or off-site that includes 50 or more attendees and are not self-service.
3.3.2 The Policy does not apply to conferences, association meetings, or congresses that are organized by an association or another organization. However, the conference, association meeting or congress that is attended by numerous [our] organization employees should be added to the central meeting calendar so that staff are aware of the date of the conference. This allows interested parties to adjust their schedules and parallel meeting plans as necessary.

3.4 Geographic scope

3.4.1 The Policy must be adhered to globally; if exceptions are granted, all exceptions will be documented in the country specific exhibit.

3.5 Compliance

3.5.1 The Policy is mandated and failure to comply may result in termination. Noncompliance will be reported using the following processes:

3.5.1.1 First offense – message will be sent to the offender;

3.5.1.2 Second offense – message will be sent to the offender’s manager and the offender to report the noncompliance;

3.5.1.3 Third offense – the offender, the manager and HR will be notified; a permanent record will be entered into the offender’s HR records; and

3.5.1.4 Fourth offense – the offender may be terminated; other actions may apply.

3.6 Exceptions

3.6.1 Exceptions to the Policy may be granted by the Meeting Sponsor/Budget Holder or another Leader. For an exception request, please contact XXXX.

3.7 No-shows

3.7.1 For no-shows, those scheduled attendees that did neither attend nor notify the meeting sponsor/requester or MES professionals 24 hours in advance, penalties will be incurred. The penalty amount will be determined by the meeting sponsor/budget holder.

4. Meeting Sponsor/Requester/Budget Holder responsibilities

4.1 Lead time

4.1.1 Meeting/event communication and lead time requests are as follows:

4.1.1.1 For meetings that are less than XXX attendees and do not require more than X breakout sessions, the lead time requested to enter the meeting into the registration system is three months. If lead time is less than three months, the availability of properties and resources may be limited and as such, higher costs may be incurred by the meeting sponsor/budget holder.

4.1.1.2 For meetings that are over XXX attendees and require multiple breakout sessions, the lead time requested is nine months. If lead time to enter the meeting into the registration system is less than nine months, the likelihood of securing the right property with the quantity of breakout rooms available is less than optimal which may result in higher costs for the meeting sponsor/budget holder.
4.1.2 Budgets

4.1.2.1 Meeting sponsors/requesters/budget holders are expected to define the meeting/event requirements and budget before contacting MES and registering the meeting. If the meeting sponsor/budget holder requires a meeting cost analysis to identify the budget, please review the meeting cost calculator on the MES portal. (Note to reader: Debi Scholar is creating a meeting cost calculator for these types of requests. Check her website by the end of 2011. Many meeting management companies also provide these types of calculators).

4.1.3 Timely responses

4.1.3.1 During the meeting planning process, meeting sponsors/requesters/budget holders should provide timely responses to MES so that the meeting planning activities can progress.

5. Meeting/Event Location

5.1 Site selection

5.1.1 Meetings/events that are held at the organization’s offices are the “business norm” and conference rooms should always be considered first before going offsite. Offsite meetings/events may be allowed if internal space is not available.

5.1.2 Meetings that include travelers from two or more locations may require an air analysis to determine the lowest cost meeting location.

5.1.3 Properties may be selected based on the hotel rating system and the type of meeting/event that will be placed in the property. For more information on the types of properties secured by MES, see the MES portal.

6. Suppliers

6.1 Supplier Selection and Contracts

6.1.1 Meeting/event suppliers will be selected based on the quality of services, timeliness, alignment to the organization strategy and price. Preferred suppliers may be secured through the organization procurement process that includes request for proposals and a thorough evaluation process. For a list of preferred suppliers, see the MES portal.

6.1.2 Any service or product that is valued over $50K must go through the organization procurement process. See the procurement policy for more information.

6.1.3 The organization’s clients that provide meeting/event services will be considered equally when securing meeting/event suppliers. If all clients and suppliers provide equal levels of service and pricing, the organization’s clients may be considered a potential supplier before non-clients.

6.1.4 The organization considers supplier diversity during the selection process. To be considered a diverse supplier, the supplier must be registered as a diversity/minority-owned business. The organization tracks diverse supplier metrics and spend in identical methods of tracking other supplier metrics and spend.

6.1.5 The organization uses our contracts, supplier contracts, and addendums to secure meeting/event suppliers. MES professionals will manage all contracts and addendums. For assistance on contracts, please see the MES portal. [Note to readers: More information on where the addendums are located and when they should be used could be added here.]
6.1.6 All contracts, regardless of the value/amount, must be signed by an organization representative as designated in the organization’s Signature of Authority document. See the procurement policy on the portal for more information.

6.1.7 All contracts, regardless of the value/amount, must be retained according to the document retention policy and stored in the contract repository. See the document retention policy on the portal for more information.

6.1.8 All rates used will be non-commissionable rates. If commissions are available on non-commissionable rates, the commission must be returned to the organization. [Note to reader: recognize that some organizations use commissions so if that is the case, some organizations prefer not to disclose how commissions are being used]

6.1.9 Crisis management plans are requested from all properties so that the MES professionals have the information need to prepare for emergencies that may arise.

7. Meeting Initiation

7.1 Meeting initiation

7.1.1 All meetings/events that are equivalent to the meeting definition provided in 3.1 must be initiated and registered through the MES portal.

7.1.2 Meetings/events can be initiated by completing the meeting registration form on the MES portal.

7.1.3 A meeting budget must be provided to initiate a meeting request. If the meeting sponsor/requester/budget holder is uncertain as to the approximate cost of a meeting/event, please use the meeting cost calculator on the MES portal. [Note to reader: Debi Scholar is creating a meeting cost calculator for these types of requests. Check her website by the end of 2011. Meeting management companies also provide these types of calculators].

7.1.4 All meetings that include senior leadership attendees must go through special security clearance that includes property investigation, access to property crisis management plans and an environmental scan. For more information on the security clearance process, see the MES portal.

7.1.5 Meetings/events will be approved by the designated business unit approver within two business days of submission of the meeting request form. Meeting sponsors/requesters/budget holders will be notified of disapproved meetings/events.

7.1.6 Disapproved meetings/events can be resubmitted for approval after the business unit leader and the meeting sponsor/requester/budget holder agree on reestablishing the meeting initiation process with the allocated budget.

7.1.7 Review the meeting/event online calendar before scheduling your meeting/event to eliminate parallel meetings from occurring at the same time.

7.1.8 Meetings that are registered and requested during the same time period and in the same location may be considered viable for the shared space initiative. Sharing meeting/event space at hotels benefits the organization by reducing cost and resources. If the meeting/event is considered viable for the shared space initiative, the meeting sponsor/requester/budget holder will be notified and discussions will follow.

7.1.9 Data that is collected during the meeting initiation stage include:

7.1.9.1 Meeting Name;

7.1.9.2 Meeting Arrival Date, Start Date, End Date;
7.1.9.3 Business unit(s) requesting the meeting;

7.1.9.4 Business unit leader contact information; [Note to reader: may need additional names for approval purposes if the technology is not designed for automatic routing]

7.1.9.5 Approximate number of attendees by business unit;

7.1.9.6 Percentage of attendees that are internal staff from the organization vs. external attendees;

7.1.9.7 Percentage of attendees that are senior leadership, directors, managers, and associates;

7.1.9.8 Meeting sponsor, budget holder, meeting contact;

7.1.9.9 Charge code;

7.1.9.10 Estimated budget (determine if the estimated budget is to include air and meeting/event content);

7.1.9.11 Technology requirements;

7.1.9.12 Meeting/event location desired;

7.1.9.13 Meeting/event venue(s) desired; and

7.1.9.14 Other information such as number of breakouts each day, AV requirements, ground transportation requirements, offsite activities desired, etc.

[Note to reader: determine what fields are necessary for your organization or the meeting management company to begin sourcing and planning a meeting. This detail helps the meeting requester know what to gather before logging into the registration system. Some organizations will not allow sourcing and planning activities until the approval is granted. As a practitioner, Debi Scholar allowed up to 4-6 resource hours to be used on a meeting/event request and then required approval from the business unit leader. If an initial site search can be conducted and estimated meeting costs be provided to the requester, it was acceptable as long as the resources did not use more than 4-6 hours to do the research. Our resources were too valuable to use time sourcing a meeting that may not be approved.]

8. Meeting Planning

8.1 Standards in Planning

8.1.1 MES requests that the meeting/event registration be closed XX days before the meeting start date so that the organization does not have to secure overflow properties that will result in additional costs. [Note to reader: if gaining more attendees is the priority, then obviously this statement is not necessary]

8.1.2 Branding is required for all meetings with external attendees and some meetings that include internal attendees. For more detail on branding requirements, see the marketing/branding portal.

8.1.3 The organization’s name may or may not be used in branding of meetings/events. For more information on who may use the organization’s name and when it may be used, see the marketing/branding portal.

8.1.4 Meeting/event attendees that are associates or senior associates (any level below manager) may be required to share rooms.
8.1.5 Meetings/events provide onsite support in the language of the country and English. If additional language requirements are needed, please contact the meeting sponsor/requester/budget holder for approval and MES will secure the appropriate resources if approved.

8.1.6 Special services may be requested and may be provided as necessary (e.g. meditation rooms, lactation rooms, sign language translators, etc.).

8.1.7 Entertainment activities must be approved by the organization. Some activities are allowed, e.g. golf, whereas other entertainment activities are not allowed, e.g. adult entertainment. MES professionals can provide meeting sponsors/requesters/budget holders with allowable entertainment activities.

8.1.8 Alcohol may be allowed at some types of meetings/events. See the alcohol policy for more information.

8.1.9 Onsite planner assistance may be requested if the meeting/event is over 100 attendees or for certain types of meetings with less than 100 attendees. The organization uses a ratio of 1 onsite planner for every 50 attendees as a common metric; some meetings/events require more or less onsite planners. MES professionals will recommend the right ratio based on the meeting/event requirements.

8.1.10 The organization supports Corporate Social Responsibility ("CSR") activities and encourages the incorporation of economic, environment and social components into meetings. For example, sustainable activities or "green" meetings are encouraged as are days of service or service-type activities. See the CSR portal for more information.

8.1.11 Training is available on how to plan small meetings that are out-of-scope of this policy and how to use the meeting management technology. See the MES portal for training services and options.

8.1.12 Meeting/event attendees may contact the MES support center at XXX-XXX-XXXX between 8:00 a.m. and 6:00 p.m. EST Monday through Friday or through [email address] anytime for assistance with a scheduled meeting/event. Voicemails and emails will be answered within one business day.

9. Technology

9.1 Meeting Management Technology

9.1.1 Meeting/event attendee registration and preferences and will be managed through the organization’s meeting management technology. Other technologies may be integrated with the meeting management technology (e.g. the online booking tool) but no other technology may be used to manage attendees’ registration (e.g. databases and spreadsheets may not be used). Using one technology across the organization allows consistent reporting and provides for easy access to data during emergencies.

9.1.2 The meeting management technology has passed all organization security tests and follows the strict security requirements of the organization. Personal information is secure and only shared with meeting planners or suppliers as necessary and discarded according to the organization’s privacy policy processes.

9.2 Other technology

9.2.1 Meetings/events may require additional technology above the business norm of computers, printers and network connectivity. If additional technology is required, the organization’s IT resources may charge separate fees.

10. Security and Risk

10.1 Confidentiality
10.1.1 Meeting/event content must be safeguarded and secured throughout the duration. All precautions must be in place to secure all confidential information. It is the business norm to obtain onsite shredders and to lock meeting rooms at all times when not in use. Other safeguards may also be required based on the meeting type. For more information on safeguarding meetings/events, see the MES portal.

10.2 Risk Mitigation

10.2.1 Meeting/event activities may require certificates of insurance that must be obtained through MES professionals. For example, boating excursions are not covered by the organization’s insurance policy and requires additional insurance. Check with MES professionals to determine what types of activities may require additional insurance.

10.2.2 Some meeting/event suppliers may request releases or waivers of liability. MES professionals or senior leaders are the only resources that may sign these documents.

10.2.3 Music at meetings/events must be “unlicensed music” or music licensed by either ASCAP or BMI (American Society of Composers, Authors and Publisher) or BMI (Broadcast Music Incorporated). MES professionals are required to view the music supplier’s license or obtain an organization license.

11. Meeting Financials

11.1 MES Services Funding

11.1.1 Meeting/event planning services through MES are funded through [shared services, business unit allocations, costs to the budget holder, commission, etc.]

11.2 Meeting/event expenses

11.2.1 Meeting/event costs are allocated by spend categories. Costs per category are monitored and should be in line with industry benchmarks. For example, food and beverage costs are not to exceed 35% of the total budget. For more information on the spend allocation thresholds, see the MES portal.

11.2.2 Most meetings/events include food and beverage, room and taxes all chargeable to a master bill. As such, additional expenses in food and beverage on corporate cards are not allowed when an attendee is at a meeting/event.

11.2.3 Shuttle services are commonly used for meetings/events. When shuttle services are used, car services, taxis or other transportation modes are not reimbursable.

11.2.4 Meetings/events must be paid through a P-card or meeting card and may not be paid via individual corporate cards. Invoices and accounts payable will only be used when a supplier does not accept a card product.

11.2.5 MES professionals manage the tips and gratuities for services supplied for meetings/events such as hotels, ground transportation, destination management companies, hostesses, etc.

11.2.6 MES professionals and Finance are responsible for obtaining the required documentation to reclaim Value Added Taxes (“VAT”) when meetings/events are held in countries with VAT.

11.2.7 Attrition or cancellation penalties may be incurred from meetings/events. The organization posts all credits resulting from the penalties on the MES portal.

11.2.7.1 For penalties under $100,000, any meeting sponsor within the organization may request use of the credit. Full credit will be given to the meeting sponsor who uses the credit.
11.2.7.2 For penalties over $100,000, the original meeting sponsor who incurred the penalty has a “right of first offer.” The meeting sponsor will have one week to reschedule a meeting/event before the credit is made available to the rest of the organization. The credit will be split between the original meeting sponsor and the new meeting sponsor dependent on negotiations with the supplier.

11.2.8 Meeting sponsors/requesters/budget holders will receive multiple reports from the MES professional planners such as budget vs. actual spend reports, attendee management reports, attendee satisfaction reports, return on investment, and other metrics as applicable.

11.2.9 Meeting/event spend is tracked so that the organization and business units may manage fiscal responsibilities. Meeting/event costs may be split among multiple charge codes and budget holders but only if the total spend is accounted for and reported at the meeting/event level.

12. Ethics

12.1 Gifts, incentives, familiarization trips, meeting planner points

12.1.1 Gifts, incentives, and other complimentary services are not allowed to be given to MES professionals or any other person in the organization. Any perishable items that are sent to the organization must be shared among staff in the local office.

12.1.2 Familiarization (“FAM”) trips are not allowed. The MES professionals and meeting sponsor may request site visit discounted rates but are not allowed to accept free room nights or any service deemed free.

12.1.3 Organization leaders and staff are not allowed to request free services or products from any supplier.

12.1.4 Meeting planner points may be accepted and accumulated for site visits or other business related travel. Meeting planner points may never be used for personal travel or services. Should meeting planner points be used for personal travel or services, the staff member is expected to reimburse the organization for the value of the points.

13. Travel

13.1 Travel

13.1.1 The organization’s travel management company must be used for all attendee travel to and from meetings and events. The meeting management company or other supplier travel services will not be allowed. This single supplier approach to travel management provides for centralized reporting, reuse of airline credits, ability to track meeting/event attendees and lower costs.

13.1.2 Meeting/event travel and personal travel may be allowed if the attendee desires to stay additional time at the location as a personal expense. The additional length of time at the location cannot cost any more than the travel expense without the personal travel.

13.1.3 The organization follows work/life balance opportunities and weekend travel will be minimized for meetings/events.

13.1.4 Attendees must stay at the property contracted during meetings/events. Exceptions to this are when the attendee lives within 50 miles of the property and prefers to spend the evenings at home. Any other exception, e.g. staying with family or friends, must be approved by the meeting sponsor.

13.1.5 Attendee’s guests, companions and children are not allowed unless a meeting/event specifically is designed to include guests, companions or children.
13.1.6 The organization has a restriction on senior leaders flying together on the same aircraft. See the Travel Policy for more information.

13.1.7 The organization has a global crisis management team and plan for emergencies. Duty of care activities include emergency support, rescue and other services as necessary.

14. Virtual Meetings

14.1 Virtual meeting support

14.1.1 Virtual meetings must be considered if the business objectives of the meeting/event can be accomplished through the more economical approach of using virtual meetings (e.g. TelePresence, videoconference, webcast, webinar, audio conference).

14.1.2 MES provides virtual meeting support such as:

14.1.2.1 Consults with the Virtual Meeting/Event (“VME”) owner/requestor on the best virtual meeting technology to use based on business objectives, audience, locations, playback requirements and budget; may act as the VME project manager and develop the project plan; confirm VME budgets, identify and secure suppliers; secure technology support resources and lead communications/registration efforts; plan the VME rehearsals and prepare presenters; act as the liaison with IT, Training & Development, Marketing and other stakeholders to develop the VME processes and best practices; and provide reports to the VME sponsor/requester. For more information, see the virtual meeting portal.

15. Questions or concerns

15.1 Contact information

15.1.1 If there are any questions, comments or issues regarding the Meeting and Event Policy, please navigate to the MES Portal and select the “Questions/Comments/Issues” option and complete the form. You will receive a response within two business days. [Note to reader: this is important to capture all information in one data repository for reporting purposes].

16. Country Exhibits

16.1 [country]

16.1.1 [document additional policies or exceptions to this policy]