



# A Guide to Trade Missions

Compiled By

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Miami-Dade County

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## INTRODUCTION

**A**lthough no two trade missions are exactly alike we have compiled this handbook to assist you and/or your organization in planning and organizing a successful and effective trade mission. On any given day there are delegations arriving in, or departing from, Miami-Dade County, Florida, to explore trade leads and business opportunities.

There is no substitute for a visit to a given site or region to gain first-hand information of how the market operates or to solicit available business opportunities. Meetings and discussion with potential business partners, distributors and local business owners can yield invaluable insights in the requirements and dynamics of the target market.

Trade missions are an investment of both time and money. And the payoffs are worth it. Trade missions are designed to provide delegates with higher profile and more credible introductions to potential partners through established networks. Participants receive comprehensive briefings and information about the local market to develop their own networking and business opportunities.

Trade missions can also generate immediate results to participants. Trade missions provide participants with direct contacts in foreign countries and new markets. Therefore, participation in a mission will also afford the participants the opportunity to familiarize themselves with the requirements of the target market and to develop their own business linkages and opportunities during a mission.

Despite the many advantages of the internet age many people still prefer direct contact with their counterparts as a prerequisite to doing trade. Such face-to-face acquaintance builds trust and confidence. Trade between individuals is more likely to succeed once trust has been established.

Whether you are a first-time mission participant or a veteran, a trade mission may prove to be one of the most memorable and rewarding opportunities of your business career. We at the Jay Malina International Trade Consortium [ITC] hope that you'll find the information in this handbook resourceful and invaluable.

Thank you.

The Jay Malina International Trade Consortium of Miami-Dade County

## **ITC MISSION STATEMENT**

ITC's mission is to create opportunities for international trade and cultural understanding by promoting and strengthening Miami-Dade County as a global gateway.

## **THE JAY MALINA INTERNATIONAL TRADE CONSORTIUM (ITC)**

**M**iami-Dade County ([www.miamidade.gov](http://www.miamidade.gov)) is a world class Global Gateway and the Jay Malina International Trade Consortium's mission is to promote and strengthen it as an international trade and cultural center by highlighting its qualities as a crossroad of trade routes with superior infrastructure for cargo, world class business climate, international financial services, and a rich mix of diverse peoples from throughout the world.

ITC is the official county government agency charged with the development of trade and was designed to function as an umbrella organization, acting as a clearinghouse for other trade development efforts within the County.

### **SERVICES OFFERED BY ITC**

The Department is a "one stop international business center" that works directly with buyers and sellers to help them achieve their merchandise trade goals. The agency continually develops programs that advance trade efforts with Africa, Asia, Europe and the Western Hemisphere. ITC offers a variety of turnkey services that include financial support, coordination and certification to incoming and outgoing trade missions. It provides the following services:

#### **Incoming Trade Mission Services**

Provides sponsorship, certification and access to economic development organizations; executive briefings; listings of County service providers; access to online database of South Florida businesses and matchmaking services.

#### **Outgoing Trade Mission Services**

ITC certifies outgoing trade missions for third-parties that are eligible to receive financial support from ITC and from Enterprise Florida Inc.

#### **ITC Led Missions**

ITC conducts several missions a year to promote Miami-Dade County. Destinations are chosen based on their potential to expand trade with Miami-Dade County.

#### **Database Program & Matchmaking**

The ITC database is an "in house" collection of over 37,000 local Miami-Dade businesses, Consulates, Economic Development Organizations, trade and professional associations. The database focuses specifically on merchandise trade companies that have the propensity to trade internationally with other nations.

#### **Miami Trade Numbers**

ITC sponsors the Miami Trade Numbers magazine published by WorldCity Magazine ([www.worldcityweb.com](http://www.worldcityweb.com)). It contains important information about trade stats, analysis, reports, imports and exports between the world and South Florida.

## **ITC Trade Initiatives**

To facilitate trade and better serve the needs of the international trade community, ITC established the following Trade Initiatives Ad-Hoc Committees: Africa, Asia, Europe & the Middle East and Western Hemisphere. The objective of the ITC Regional Trade Initiatives Committees is to develop and expand trade and cultural linkages with the respective regions thereby enhancing Miami-Dade County's role as the Gateway to the Americas and platform for international trade.

## **SISTER CITIES PROGRAM**

The purpose of the program is to promote relations between Miami-Dade County and its sister cities through cultural and educational exchanges, to promote tourism, trade and commerce, as well as to serve as liaison to the Consular Corps. The program has established sister cities relationships with twenty three cities in Latin America, the Caribbean, Europe and Asia. To view a complete list of Miami-Dade County's sister cities, please visit the following link: [www.miamidade.gov/sistercities/about.asp](http://www.miamidade.gov/sistercities/about.asp).

## **ABOUT MIAMI-DADE**

Miami-Dade County, Florida is the "Gateway of the Americas,"™ and the platform for Hemispheric trade. It is the metropolitan government of an area that includes:

- Population of 2.3 million and 35 municipalities
- Operation of the Port of Miami and Miami International Airport
- A budget of approximately 7 billion (2006-2007) with a labor force of 1.1 million
- Total merchandise trade - \$72 billion and GDP - \$80 billion
- More than 11.6 million overnight visitors (2006) bringing in \$16 billion
- 156 nationalities in the County with 104 spoken languages.
- 67 Foreign consulates in South Florida Region
- 1,350 multinationals corporations with the 2nd largest financial capital in the USA, after New York.

## **Contact Information**

Jay Malina International Trade Consortium  
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Miami, FL 33128  
Phone: 305-375-5808 ; Fax : 305-679-7895  
E-Mail: [itc@miamidade.gov](mailto:itc@miamidade.gov); URL: [www.miamidade.gov/itc](http://www.miamidade.gov/itc)

## **TYPES OF MISSIONS**

Missions are designed to find new markets and representation for products and services, and can lead to export sales, joint ventures, licensing arrangements, and direct sales or direct investment opportunities.

### **Incoming Trade Missions**

Incoming or inbound trade missions consist of foreign delegates received and hosted by a local entity. The planning and organization of incoming missions are equally as demanding as outgoing missions depending on the stated objectives.

### **Outgoing Trade Missions**

An outgoing or outbound trade mission, as the name implies, is a mission organized by a host entity [United States] to a foreign nation. Outgoing missions are categorized depending on their purpose:

#### **1. *Specialized Trade Missions***

A specialized trade mission targets a specific industry or selection of a product line and an itinerary that appear to offer the best potential for export sales. Publicity and advance planning, with key foreign officials are customary and necessary. These arrangements are made in partnership with trade specialists, Chambers of Commerce or US Commercial Service staff in the foreign country.

#### **2. *Business Development / Market Visitation / Briefing Mission***

Also referred to as “Exploratory” or “Branding” Missions, these are fact-finding missions designed to familiarize, explore and evaluate new markets and business opportunities. These missions also serves to generate a trade lead or brand or promote a geographic region or an organization. A component of the mission could usually entail workshops, visitations, briefings or promotion of local markets to foreign markets.

#### **3. *Trade Exhibitions***

A trade exhibition provides the opportunity for the potential buyer and seller to showcase their goods and services in one location. The possibilities for direct leads or sales are much greater.

### ***Business Matchmaking Opportunities***

One of the most important aspects of an inbound or outbound mission is business matchmaking - the opportunity to meet one-on-one with potential overseas buyers and sellers. A matchmaker-business delegation consists of groups of U.S. business persons representing new-to-export or new-to-market firms that are brought into contact with agents, distributors, licensees, franchisees or joint venture partners for the purpose of establishing representation in the countries visited.

The Mission Coordinator should develop a matchmaking form to ensure that all the organizations that are registered on a given trade mission have appointments with local businesses during the mission. The matchmaking form should have columns with the matching businesses and date, time and venue for the appointments.

## **ITC ELIGIBLE MISSIONS**

The Jay Malina International Trade Consortium (ITC) provides support to Miami-Dade County organizations that conduct incoming or outgoing missions and that support the ITC's strategic plan for missions. To be eligible for funding and support, the mission's primary objective must be to develop trade relationships that foster or facilitate the trade of products, goods and/or the sourcing of representation through agents, distributors, and joint ventures as well as to promote Miami-Dade County as a platform for international trade.

### ***Third-party Incoming Missions***

Financial support for third-party incoming missions is available to organizations that organize inbound trade missions. Funding is contingent upon the availability of funds. Applicants must request in writing for sponsorship and consult the ITC regarding availability of funds prior to conducting the mission. For additional information please contact the ITC by calling **305.375.5808** or visit our website at [www.miamidade.gov/itc](http://www.miamidade.gov/itc). Qualified applicants for ITC certified incoming trade mission may be required to complete and return the Incoming Pre-Mission Questionnaire form to the ITC prior to the arrival of the delegation (see **Appendix I** on page 16).

## **ITC Outgoing Missions**

### ***Level I: Miami-Dade County Branding / Business Development Missions***

Missions planned and organized by ITC and led by an elected Miami-Dade County official or the Chair of the ITC or his/her designee.

### ***Level II: Best Prospects Missions***

Missions planned and organized by third parties seeking best prospects for their products in other cities/countries. This includes trade shows, exhibitions, etc.

### ***Application and Eligibility for ITC Outgoing Mission Certification***

The ITC Mission Application Process consists of:

- A. Application for Mission Certification
- B. Review of Mission Application
- C. Mission Certification and Approval by ITC Board
- D. Mission Expense Reimbursement

Eligible organizations receive the official endorsement of the ITC and Miami-Dade County for the mission, and may receive limited funding in the amount not to exceed \$4,000. Grantees may apply for more than one mission but the maximum amount given to any entity for reimbursement of mission expenses for outgoing and incoming will not exceed \$6,000 in a County fiscal year (October 1 – September 30)

Applicants are evaluated in accordance with the criteria established by the ITC Board of Directors from time to time. Only those trade missions originating in Miami-Dade County will be eligible for certification. But missions originating from Miami-Dade may be composed of individuals residing outside of the County.

Qualifying organizations eligible for funding must legally be organized as a not-for-profit entity in the State of Florida or be a representation of foreign governmental agencies. However, those organized by for profit organizations may be qualified for certification but will not be eligible for financial support from ITC.

Levels II missions must have a minimum of ten (10) participants unless otherwise approved by the Executive Director for special circumstances and grantee must complete and submit an application for mission certification to the ITC at least thirty (30) days prior to undertaking the mission. To download a copy of an Outgoing Missions Application Form and Instructions please visit this web-link: [www.miamidade.gov/ITC/about\\_outgoing\\_missions.asp](http://www.miamidade.gov/ITC/about_outgoing_missions.asp)

## **DEVELOPING OUT-BOUND MISSIONS**

### **Third Party Missions**

A third-party outgoing trade mission is a mission organized by a third-party or entity such as a Chamber of Commerce. Third-party outgoing missions may qualify for ITC's endorsement and limited funding. An ITC endorsed third-party outgoing mission may receive a letter of support from the ITC and logistical assistance from ITC staff. To ensure effective planning and success of a mission we strongly recommend a minimum lead-time of ninety (90) days.

### **Pre-mission Activities**

There are many reasons or objectives for deciding to visit a particular nation, group of countries, or region. The organization planning a mission may already have pre-existing contacts with the individuals or trade agencies in the target country. The first step to a successful mission is to determine the mission objectives.

#### **A. Mission Objective**

It is critical to establish compelling reasons for your mission and then determine how to achieve them. Since objectives are the basis for program content and design, it is important to take the time to collect information about the mission as a basis for developing clear, measurable, and compelling objectives that will provide a meaningful return on investment for both the participants and the sponsoring organization.

Once the objectives of the mission are determined and a decision is reached to visit a given nation, additional research is needed to identify the needs of the group. A project manager or Mission Coordinator should then be appointed to coordinate all aspects of the mission.

#### **B. Mission Coordinator**

The Mission Coordinator, a skilled trade professional or meeting planning professional, is responsible for designing and planning all logistical aspects of the program/agenda. The coordinator promotes and markets the event and assist in the recruitment of participants for the mission. The Mission Coordinator also acts as liaison between the foreign host(s) or organization and the mission participants.

An effective Mission Coordinator assumes the leadership role in coordinating all aspects of the mission to maximizing everyone's contribution in order to plan a program that offers participants a productive and educational experience for their value. It is the responsibility of the coordinator to create a positive meeting environment and experience for the mission participants. The coordinator must make certain that all the essential elements of the mission are properly combined to serve the business interests of the participants.

The Mission Coordinator through market research and product evaluation helps to pinpoint the most promising itinerary and efficient program. To achieve this goal a **site inspection** is vital.

### C. Site and Facility Inspection

The site inspection visit should occur well in advance of the proposed mission and no later than ninety days (90) prior to the mission date. A site visit to the destination is critical to obtaining realistic cost estimates for services. A site inspection visit is invaluable for judging the suitability and current condition of a meeting facility – as well as the professionalism and attitude of facility staff.

The purpose of a site inspection visit is to enable the Mission Coordinator to:

- Become familiar with the destination and the meeting facilities.
- Conduct an evaluation of available facilities, on-site equipment, transportation, etc.
- Plan appropriately to realize participants’ interests and expectations.
- Review and evaluate service providers and contractors.
- Select and confirm sites and facilities as needed.
- Discuss one-to-one matchmaking schedules.
- Determine budget estimates and negotiate contracts.
- Design and finalize all aspects of the program/agenda and logistics.

The Mission Coordinator should contact the commercial and economic offices of the U.S. embassies and Consulates abroad for assistance. Contact should also be made with bi-national chambers of commerce, national or local chambers of commerce, World Trade Centers, trade groups and agencies, etc. (A sample site and facility Inspection Checklist is provided for your convenience – see [Appendix II](#) on page 17).

### D. Developing a Proposed Mission Budget

The Mission Coordinator must also develop a proposed mission budget as a guide to controlling costs. Understanding the cost structure will help in your budget preparations. The formulas provided below will guide you in determining your break-even analysis or what to charge for registration, etc. (A sample Mission Financial Statement - [Appendix III](#) is provided on Page 19).

<b>COSTS</b>	<b>DESCRIPTION</b>
<b>Indirect costs</b>	Overhead or administrative line items. Expenses not directly related to an event, such as staff salaries, equipment repairs, etc.
<b>Fixed costs</b>	Expenses incurred regardless of the number of attendees, such as Audio Visuals, meeting room rentals, transportation, etc.
<b>Variable Costs</b>	Expenses that can vary based on the number of attendees, such as food & beverage, etc.
<b>FORMULAS</b>	
<b>Registration Fee</b>	Total Fixed Costs <b>divided by</b> Number of Attendees, then <b>add</b> the Variable Costs
<b>Break-even</b>	Total Fixed Costs <b>divided by</b> Registration Fee <b>minus</b> Variable Costs

## E. Pre-Mission Briefing

Once the site inspection has been completed and the tentative program/agenda is prepared, the Mission Coordinator then invites all registered mission participants to a **pre-mission briefing**. It is advisable to conduct the pre-mission briefing no later than seven (7) days prior to departure. The pre-mission briefing serves the following purposes:

- To get all mission participants acquainted.
- Review the mission objectives and goals.
- Review the itinerary and program/agendas.
- Review lodging arrangements, rooming list and other logistical details.
- Provide information regarding customs regulations and duties.
- Discuss foreign currency exchange restrictions and controls.
- Reiterate lines of communication and assignments during the mission.
- Provide counsel on mission protocol

The Mission Coordinator should provide as much background information about the mission as possible to the participants during the briefing. The more information mission participants receive in advance, the more productive and successful the mission will be. You may also invite the Consul General or Trade Commissioner of the country to be visited and/or President of the Bi-National Chamber of Commerce to brief delegates about available trade and business opportunities in their respective countries. A sample pre-mission briefing agenda is provided below as a guide:

1. Call to order
2. Mission leader opening remarks
3. Introductions
4. Mission overview & Objectives
5. Mission itinerary and on-site activities
6. Country briefs and business opportunities in the countries to be visited
7. Mission protocol
8. Q & A
9. Adjournment

## Mission Protocol

The importance of understanding protocol cannot be overemphasized. It is imperative for all participants to understand and respect matters of protocol to avoid cultural, social, business and political embarrassments and pitfalls. Protocol also entails formal and familiar forms of address and when to use them, as well as entertaining and gift-giving customs.

The *mission leader* is the spokesperson for the group traveling abroad. The mission leader is responsible for making all important speeches and remarks on behalf of the delegation. The mission leader also approves on-site changes to the program and ensures the group's cohesiveness.

## **Post-mission Activities**

- Ensure that all delegates participate in the post-mission evaluation process
- Complete an end-of-mission report.
- Send copies of report and trade statistics resulting from the mission to media outlets
- Attach photographs, papers, presentations, video clips, newspaper articles, etc.
- Collate and submit all receipts for reimbursements if required by sponsoring organization
- Send Thank you notes to local and foreign hosts and organizations.

## **OVERSEAS BUSINESS TRAVEL**

### **Travel Documents & Health Information**

Outbound mission involves travel to other countries. All overseas travelers are required to have valid documentation before departing from the United States. All travelers are required to have a valid passport, visas, when applicable, from certain host countries and, in some instances, vaccination records. For additional information about visas and travel advisories, contact the US State Department website at [www.travel.state.gov](http://www.travel.state.gov) or the Embassy or Consulate of the respective country.

United States passports may be obtained through passport agencies, certain local post offices, and U.S. district courts. Visas or certificate of entry can be obtained from the respective embassy or consulate in the United States for a small fee. The party coordinating the mission may assist participants in providing the relevant forms and visa information including fees.

Requirements for vaccination differ by country. The Center for Disease Control [CDC] maintains a fax-back system and a homepage to advise travelers of current and accurate country and region conditions. For additional information, visit the CDC website at: [www.cdc.gov/](http://www.cdc.gov/). (See **Appendix IV** for more contact information, resources and useful web-links on page 20).

### **Shipping Product or Samples & Documentation**

#### **A. ATA Carnet**

Most trade missions involve the transportation of product samples or participation in a trade exhibition. Government regulations for the import/export of goods are strictly regulated and accompanying documents must be fully completed as requested. If the U.S. firm is bringing a product for demonstration or sample purposes, then Admission Temporaire [ATA] Carnet may also be required.

An ATA Carnet (pronounced car-nay) is an official international customs document that simplifies taking temporary imports like commercial samples and professional equipment into other countries that are part of the carnet system. ATA stands for Admission Temporaire / Temporary Admission. An ATA Carnet is valid for up to one year. Customs authorities in most developing countries worldwide accept ATA Carnets.

The Carnet is their guarantee that all duties and excise taxes will be paid in the event that any of the items on the document are not taken out of the country within a year. In the United States, the U.S. Council for International Business [www.uscib.org](http://www.uscib.org) has been designated by the U.S. Customs Service as the issuing and guaranteeing organization of ATA Carnet (19 CFR 114).

The advantages of using an ATA Carnet are as follows:

- Reduce costs to the exporter.
- Eliminate value-added taxes (VAT), duties, and the posting of security normally required at the time of importation.
- Simplify customs procedures.
- Allow a temporary exporter to use a single document for all Customs transactions.

- Make arrangements for many countries in advance, and do so at a predetermined cost.
- Facilitate reentry into the United States.
- Eliminate the need to register goods with Customs at the time of departure.

#### Merchandise Covered by the ATA Carnet

- Virtually all goods, personal and professional, including commercial samples, professional equipment, and goods intended for use at exhibitions and fairs.
- Ordinary goods such as computers, tools, cameras and video equipment, industrial machinery, automobiles, gems and jewelry, and wearing apparel.
- Extraordinary items, for example, fine art, circus animals, aircraft, musical instruments, racing yachts, satellites, etc.
- Carnets **do not cover**: consumable goods (food and agricultural products), disposable items, or postal traffic.

A list of member countries can be found at: <http://www.uscib.org/index.asp>. A security deposit (generally 40 percent the value of the shipment) is provided to the administering agency in one of two ways: 1) a surety bond usually 1 percent of the value of the bond obtained from a surety company; or 2) a certified check. The Council will use the bond or check to cover duties or taxes if the imported goods are sold while overseas.

Under the ATA Convention, commercial and professional travelers may take: commercial samples; tools of the trade; advertising materials; and cinematography, audiovisual, medical, scientific, or other professional equipment into member countries temporarily without paying customs duties and taxes or posting a bond at the border of each country to be visited.

#### ***B. Commercial Invoice***

The shipper must include a commercial invoice or an inventory of goods shipped.

#### ***C. Consular Invoice***

Is a document that contains a description of goods shipped, including consignor, consignee and value of shipment; certified by a consular officer.

#### ***D. Export License***

Document granted by the government for highly sensitive technical or military material.

#### ***E. Limited power of attorney***

Permits the customs broker to complete the customs document upon the return of shipment to a country of origin.

# APPENDIX I



## Incoming Trade Mission

### Pre-Mission Questionnaire

Applicants wishing to host an in-coming trade delegation endorsed by the ITC should complete and return this questionnaire to ITC no later than 30 days prior to the departure of the trade delegation from the originating city.

Name of Event: \_\_\_\_\_

Event Coordinator's Name & Title: \_\_\_\_\_

Event Host/Sponsor: \_\_\_\_\_

Contact Address: \_\_\_\_\_

Tel: \_\_\_\_\_ Mobile: \_\_\_\_\_ Fax: \_\_\_\_\_

E-Mail: \_\_\_\_\_ URL: \_\_\_\_\_

Approximate Number of Participants: \_\_\_\_\_ Proposed Mission Dates: \_\_\_\_\_

Departure Date from City of Origin: \_\_\_\_\_ Arrival City: \_\_\_\_\_

Mission Objectives: \_\_\_\_\_

\_\_\_\_\_

Is One-to-One Business Matchmaking Required?  Yes  No

*[If YES, please send each participant's contact information, company profile and their respective industry or sector, product/service with brand names if applicable]*

Does the group need assistance with lodging arrangements? \_\_\_\_\_

Does the group need assistance with airport transfers? \_\_\_\_\_

Does the group need assistance with ground transportation? \_\_\_\_\_

Please list proposed sites to visit: \_\_\_\_\_

\_\_\_\_\_

List any special needs: \_\_\_\_\_

**Comments:** \_\_\_\_\_

\_\_\_\_\_

## APPENDIX II

### Site & Facility Inspection Checklist

#### Facility Overview

Date[s] of site inspection: \_\_\_\_\_

Facility [Headquarters Hotel] Name: \_\_\_\_\_

Current or anticipated owners of facility: \_\_\_\_\_

Star Rating: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Country: \_\_\_\_\_

Tel: \_\_\_\_\_ Toll-free: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_ Web site address: \_\_\_\_\_

Year established: \_\_\_\_\_ Total No. of rooms in facility: \_\_\_\_\_

Proposed dates of your event: \_\_\_\_\_

Reservation policy [cut-off date]: \_\_\_\_\_ Deposit policy: \_\_\_\_\_

Cancellation & attrition policies: \_\_\_\_\_

Complimentary room policy: \_\_\_\_\_

Check-in Time: \_\_\_\_\_ Check-out times: \_\_\_\_\_

List in-room amenities: \_\_\_\_\_

Services available: \_\_\_\_\_

Liquor policy & alcohol laws: \_\_\_\_\_

Note catering menus: \_\_\_\_\_

Audio Visuals, telecommunication needs: \_\_\_\_\_

Internet access and network connectivity: \_\_\_\_\_

Portage fee: \_\_\_\_\_

What other charges may be posted on bills?: \_\_\_\_\_

List **all** applicable taxes such as *Service charge and government tax on guestrooms and food; Bed tax; Etc.*: \_\_\_\_\_

Gratuity percentage: \_\_\_\_\_

Proposed number of rooms needed for your event: \_\_\_\_\_

#### Proposed room rates

	<b>Single</b>	<b>Double</b>	<b>Double/Double</b>	<b>King</b>	<b>Suite</b>
Room Rate	\$_____	\$_____	\$_____	\$_____	\$_____
Smoking	_____	_____	_____	_____	_____
Non-Smoking	_____	_____	_____	_____	_____

Hotel Renovation Plans [if any]: \_\_\_\_\_

Meeting room types and space needed: \_\_\_\_\_

Floor plan for each meeting room required: \_\_\_\_\_

Availability of parking and cost of parking: \_\_\_\_\_

List nearby hotels for overflow: \_\_\_\_\_

List local entertainment, shops, stores, restaurants, etc in close walking distance: \_\_\_\_\_

**Key Contact Persons**

Get the names and contact information [business cards] of the following individuals:

General Manager: \_\_\_\_\_

Conference Services Manager: \_\_\_\_\_

Sales Manager: \_\_\_\_\_

Catering Director: \_\_\_\_\_

Electrical Personnel: \_\_\_\_\_

Audio Visual Manager: \_\_\_\_\_

Security Manager: \_\_\_\_\_

Other: \_\_\_\_\_

**Transportation**

Distance from port of entry [airport] to headquarters hotel: \_\_\_\_\_

Shuttle service available from airport: \_\_\_\_\_

Taxi rate from airport to hotel: \_\_\_\_\_

Type of transportation needed: \_\_\_\_\_

Transportation schedule: \_\_\_\_\_

Estimated transportation cost: \_\_\_\_\_

Note traffic considerations: \_\_\_\_\_

**General**

Take photos or video for reference: \_\_\_\_\_

Names of local service providers or vendors: \_\_\_\_\_

Estimate any insurance for your group or event: \_\_\_\_\_

Local holidays or major regional events: \_\_\_\_\_

Local doctors and child care providers: \_\_\_\_\_

Sports and recreational activities: \_\_\_\_\_

Other major groups scheduled for the same period as your event?: \_\_\_\_\_

## APPENDIX III

### SAMPLE FINANCIAL STATEMENT

#### ESTIMATED BUDGET

#### Estimated Revenue

	<u>(A) CASH</u>	<u>(B) IN-KIND</u>
Estimated Participant Fees	_____	
Estimated Sponsorships	_____	_____
Grants	_____	_____
<b><i>Other Sources of Support – List</i></b>		
_____	_____	_____
_____	_____	_____
<b>Grand Total</b>	_____	
	(A + B)	

#### Estimated Expenses

<u>AIRFARE &amp; LODGING</u>	<u># OF DAYS</u>	<u># OF PARTICIPANTS</u>	<u>SUB-TOTAL</u>
Airfare	_____	_____	_____
Airport departure tax	_____	_____	_____
Hotel Accommodation	_____	_____	_____
Meals	_____	_____	_____
<b><u>Total Airfare + Lodging</u></b>			[i] _____

#### ADMINISTRATIVE

	<u>[C] Cash Exp</u>	<u>[D] In-Kind</u>
In-Country Contract Personnel	_____	_____
Appointments Coordinator	_____	_____
Translation	_____	_____
Facilities/Space Rental	_____	_____
Equipment Rental	_____	_____
Office Supplies	_____	_____
Telephone & Fax	_____	_____
Transportation	_____	_____
Insurance	_____	_____
Utilities	_____	_____
Other Costs	_____	_____
<b><u>Total Administrative Expense [C + D]</u></b>		[ii] _____

#### MARKETING AND PROMOTION

	<u>[E]</u>	<u>[F]</u>
Advertising/Publicity	_____	_____
Printing	_____	_____
Mailings	_____	_____
Gifts	_____	_____
Group Meetings[One-to-one Matchmaking]	_____	_____
Entertainment & Receptions	_____	_____
Miscellaneous	_____	_____
<b><u>Total Marketing &amp; Promotion [E + F]</u></b>		[iii] _____

**Total Expenses [i + ii + iii]**

\_\_\_\_\_

## APPENDIX IV

### USEFUL INFORMATION AND WEB LINKS

#### Economic Development Organizations and Related Agencies in South Florida

<p><b>The Beacon Council</b> 80 SW 8<sup>th</sup> Street, Suite 2400, Miami, FL 33130 305.579.1300 ■ <a href="mailto:info@beaconcouncil.com">info@beaconcouncil.com</a> URL: <a href="http://www.beaconcouncil.com">www.beaconcouncil.com</a></p>	<p><b>The Better Business Bureau</b> 2924 North Australian Ave, West Palm Beach, FL 33407 561.842.1918 ■ <a href="mailto:info@sefflorida.bbb.org">info@sefflorida.bbb.org</a> URL : <a href="http://www.bbbsoutheastflorida.org">www.bbbsoutheastflorida.org</a></p>
<p><b>Association of Bi-National Chambers of Commerce, Florida</b> 260 Crandon Blvd., Suite 32-PMB-136, Key Biscayne, FL 33149 305.365.7247 ■ <a href="mailto:Lita@abicc.org">Lita@abicc.org</a> URL: <a href="http://www.abicc.org">www.abicc.org</a></p>	<p><b>Broward County Office of Economic Development</b> 115 S. Andrews Ave., Room A-540, Ft. Lauderdale, FL 33301 954.357.6155 ■ <a href="mailto:ntaylor@broward.org">ntaylor@broward.org</a> <a href="http://www.broward.org/welcome.htm">www.broward.org/welcome.htm</a></p>
<p><b>The Black Business Association</b> 6013 NW 7<sup>th</sup> Avenue, 2<sup>nd</sup> Floor Miami, FL 33127 305.835.6220 <a href="mailto:bba2002@bellsouth.net">bba2002@bellsouth.net</a></p>	
<p><b>The Broward Alliance</b> 300 SE 2<sup>nd</sup> Str., Suite 780, Ft. Lauderdale, FL 33301 954.524.3113 ■ <a href="mailto:info@browardalliance.org">info@browardalliance.org</a> URL: <a href="http://www.browardalliance.org">www.browardalliance.org</a></p>	<p>Chambers of Commerce, Florida <a href="http://online-chamber.com/Florida.html">http://online-chamber.com/Florida.html</a></p>
<p><b>City of Miami International Trade Board</b> 444 SW 2<sup>nd</sup> Ave., 7<sup>th</sup> Floor, Miami, FL 33130 305.416.1941 ■ URL: <a href="http://www.trademiami.com">www.trademiami.com</a></p>	<p><b>Greater Miami Chamber of Commerce</b> 1601 Biscayne Boulevard - Ballroom level Miami, Florida 33132-1260 <b>305-350-7700 or 305-577-5490</b> <a href="mailto:info@miamichamber.com">info@miamichamber.com</a> 305.577.7700 URL: <a href="http://www.miamichamber.com">www.miamichamber.com</a></p>
<p>Consular Corps of Florida <a href="http://www.dos.state.fl.us/oir/consular/index.html">www.dos.state.fl.us/oir/consular/index.html</a></p>	<p><b>Empowerment Zone Trust, Inc</b> 3050 Biscayne Blvd., Suite 300, Miami, FL 33137 305.372.7620; <a href="mailto:ezonewebmaster@www.ezonetrust.org">ezonewebmaster@www.ezonetrust.org</a> URL: <a href="http://www.ezonetrust.org">www.ezonetrust.org</a></p>
<p><b>Export-Import Bank</b> Southeastern Regional Office 5835 Blue Lagoon Drive, Suite 203, Miami, FL 33126 305.526.7436 ■ <a href="mailto:info@exim.gov">info@exim.gov</a> <a href="http://www.exim.gov">www.exim.gov</a></p>	<p><b>Enterprise Florida Inc</b> 2801 Ponce de Leon Blvd., Suite 700, Coral Gables, FL 33134 305.569.3650 ■ URL : <a href="http://www.eflorida.com">www.eflorida.com</a></p>
<p><b>Florida Association for volunteer Action in the Caribbean &amp; Americas [FAVACA]</b> 1310 N. Paul Russell Rd., Tallahassee, FL 32301 305.377.5500 ■ <a href="mailto:favaca@favaca.org">favaca@favaca.org</a> URL: <a href="http://www.favaca.org">www.favaca.org</a></p>	<p><b>Florida Customs Brokers &amp; Forwarders Association</b> 2305 NW 107 Avenue; Doral, FL 33172 305.499.9490 ■ <a href="mailto:information@fcbf.com">information@fcbf.com</a> URL: <a href="http://www.fcbf.com">www.fcbf.com</a></p>
<p><b>Florida Department of State</b> Department of State, Division of Corporations 409 E. Gaines Street, Tallahassee, FL 32399 800.755.5111 ■ <a href="mailto:corphelp@dos.state.fl.us">corphelp@dos.state.fl.us</a> URL: <a href="http://www.sunbiz.org">www.sunbiz.org</a></p>	<p><b>Florida Economic Development Council</b> The Atrium Building 325 John Knox Road, Suite 201 Tallahassee, FL 32303 850.201.3332 ■ <a href="mailto:info@fedc.net">info@fedc.net</a> URL: <a href="http://www.fedc.net">www.fedc.net</a></p>
<p><b>Florida Foreign Trade Association</b> 2305 NW 107<sup>th</sup> Ave, Suite CU 10 &amp; FZ10A, Box 28 Miami Free Zone, Miami, FL 33172 305.471.0737 ■ <a href="mailto:ffa2000@cs.com">ffa2000@cs.com</a> URL: <a href="http://www.ffa.com">www.ffa.com</a></p>	<p><b>Florida International Bankers Association</b> 80 SW 8th Street, Suite 2505 Miami, FL 33015 305.579. 0086 ■ <a href="mailto:fiba@fiba.net">fiba@fiba.net</a> URL: <a href="http://www.fiba.net">www.fiba.net</a></p>
<p><b>Florida Regional Minority Business Council</b> 600 NW 79 Ave., Suite 136, Miami, FL 33126 305.260.9901 ■ <a href="mailto:info@frmbc.org">info@frmbc.org</a> URL: <a href="http://www.frmbc.org">www.frmbc.org</a></p>	<p><b>Florida Free Trade Area of the Americas Inc</b> Biltmore Executive Center 1200 Anastasia Ave, Suite 440, Coral Gables, FL 33134 (305) 476-5451 ■ <a href="mailto:info@floridaftaa.org">info@floridaftaa.org</a> URL: <a href="http://www.Floridaftaa.org">www.Floridaftaa.org</a></p>

<p><b>Florida Black Chamber of Commerce</b>  17 West Maxwell Street, Pensacola, Florida 32501  850.433.0593 <a href="mailto:info@FloridaBCC.com">info@FloridaBCC.com</a>  <a href="http://www.Floridabcc.com">www.Floridabcc.com</a></p>	<p><b>Florida Business Incubation Association</b>  <b>c/o Julie A. Matthews</b>  FBIA Manager  12565 Research Pkwy, Ste. 300  Orlando, FL 32826  T: 407-489-0387; F: 407-737-2512  <a href="mailto:jamathew@mail.ucf.edu">jamathew@mail.ucf.edu</a>  <b>URL:</b> <a href="http://www.incubator.ucf.edu">www.incubator.ucf.edu</a></p>
<p><b>Greater Miami Convention and Visitors Bureau</b>  710 Brickell Ave, Suite 2700, Miami, FL 33131  305. 539.3000 ■ <a href="mailto:info@gmcvb.com">info@gmcvb.com</a>  URL: <a href="http://www.gmcvb.com">www.gmcvb.com</a></p>	<p><b>International Business Council</b>  504 SE 19<sup>th</sup> Street, Suite #!, Ft. Lauderdale, FL 33316  954.467.3075 ■ <a href="http://www.internationalbusinesscouncil.com">www.internationalbusinesscouncil.com</a></p>
<p><b>Haitian-American Center for Economic and Public Affairs, Inc.</b>  8325 Northeast 2<sup>nd</sup> Avenue, Suite 205, Miami, Florida 33138  305.759-4795 ■ <a href="mailto:hacepa@bellsouth.net">hacepa@bellsouth.net</a>  www.</p>	<p><b>National Minority Chamber of Commerce</b>  150 NW 86 PL. Miami FL 33126  786.260-1966 ■ <a href="mailto:director@minoritychamber.net">director@minoritychamber.net</a>  <a href="http://www.minoritychamber.net">www.minoritychamber.net</a></p>
<p><b>Jay Malina International Trade Consortium</b>  111 NW First Avenue, 25<sup>th</sup> Floor, Suite 2560  Miami, FL 33128  305.375.5808 ■ <a href="mailto:itc@miamidade.gov">itc@miamidade.gov</a>  URL: <a href="http://www.miamidade.gov/itc">www.miamidade.gov/itc</a></p>	<p><b>Miami Council for International Visitors</b>  200 Ponce de Leon Blvd., 6<sup>th</sup> Floor, Coral Gables, FL 33134  305.421.6344 ■ <a href="mailto:Laurayanes@miamiciv.org">Laurayanes@miamiciv.org</a>  URL: <a href="http://www.miamiciv.org">www.miamiciv.org</a></p>
<p><b>Miami-Dade County, Florida</b>  Stephen P. Clark Government Center  111 NW First Street, Miami, FL 33128  <a href="http://www.miamidade.gov">www.miamidade.gov</a></p>	<p><b>Miami Export Assistance Center</b>  305.526.7425 URL: <a href="http://www.export.gov">www.export.gov</a></p>
<p><b>Miami-Dade County Office of Strategic Business Management</b>  Stephen P. Clark Government Center  111 NW First Street, 22<sup>nd</sup> Floor  305.375.5143 ■ <a href="http://www.miamidade.gov/osbm/home.asp">www.miamidade.gov/osbm/home.asp</a></p>	<p><b>Miami-Dade County Office of Community Development</b>  140 West Flagler Street, Miami, FL 33013  305.375.3422 ■ <a href="mailto:webmaster@miamidade.gov">webmaster@miamidade.gov</a>  URL: <a href="http://www.miamidade.gov/ced/">www.miamidade.gov/ced/</a></p>
<p><b>Miami Free Zone</b>  2305 NW 107<sup>th</sup> Ave., Doral, FL 33172  305.591. 4300 ■ <a href="mailto:info@miamizone.com">info@miamizone.com</a>  URL: <a href="http://www.miamizone.com">www.miamizone.com</a></p>	<p><b>Miami International Airport</b>  Miami Dade Aviation Department  P.O. Box 592075, Miami, FL 33159  305.876.7862 ■ <a href="mailto:customerservice@miami-airport.com">customerservice@miami-airport.com</a>  URL: <a href="http://www.miami-airport.com">www.miami-airport.com</a></p>
<p><b>Organization of Women in International Business</b>  444 Brickell Avenue, Suite 51-329, Miami, FL 33131  305-642-7224 Fax: 954-888-8173  <a href="mailto:daisy.pagan@ey.com">daisy.pagan@ey.com</a>  URL: <a href="http://www.wit-miami.com">www.wit-miami.com</a></p>	<p><b>Women's Chamber of Commerce of Miami-Dade</b>  444 Brickell Avenue, Plaza 51-225, Miami, FL 33131  305-446-6660 ■ Fax: 305-675-8523  <a href="mailto:info@womenschamberofcommerce.org">info@womenschamberofcommerce.org</a>  URL: <a href="http://www.womenschamberofcommerce.org/">www.womenschamberofcommerce.org/</a></p>
<p><b>Office of Tourism, Trade and Economic Development</b>  305.476.4840 ■ URL: <a href="http://www.oir.dos.state.fl.us">www.oir.dos.state.fl.us</a></p>	<p><b>Port of Miami</b>  Administrative Offices  1015 N. America Way; 2nd Floor; Miami, Florida 33132  305.371.7678 ■ URL: <a href="http://www.miamidade.gov/portofmiami">www.miamidade.gov/portofmiami</a></p>
<p><b>Small Business Administration</b>  South Florida District Office  100 S. Biscayne Blvd - 7th Floor  Miami, FL 33131  305.536.5521 ■  URL: <a href="http://www.sba.gov/fl/south">www.sba.gov/fl/south</a></p>	<p><b>Tools for Change</b>  6015 NW 7th Ave. Miami, Florida 33127  305.751-8934  305.751.8934 ■ <a href="mailto:info@tfc.org">info@tfc.org</a>  URL: <a href="http://www.tfc.org">www.tfc.org</a></p>
<p><b>Miami Dade Chamber of Commerce</b>  11380 N.W. 27th Avenue, Building 1, Suite 1328  Miami, Florida 33167  305-751-8648 ■ <a href="mailto:mdcc@m-dcc.org">mdcc@m-dcc.org</a>  <a href="http://www.m-dcc.org">www.m-dcc.org</a></p>	<p><b>World Trade Center Miami</b>  1007 N. America Way, Suite 500, Miami, FL 33132  305.871.7910 ■ Fax: 305.871.7904  <a href="mailto:info@worldtrade.org">info@worldtrade.org</a>  URL : <a href="http://www.worldtrade.org">www.worldtrade.org</a></p>

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- American Translators Association [www.americantranslators.org/](http://www.americantranslators.org/)
- Center for Disease Control [www.cdc.gov/](http://www.cdc.gov/)
- CIA World Fact Book [www.cia.gov/cia/](http://www.cia.gov/cia/)
- City Net – Profiles of locations and Cities worldwide [www.city.net](http://www.city.net)
- Convert It! [www.microimg.com/science/](http://www.microimg.com/science/)
- Embassies and Consulates of the World [www.embassyworld.com/](http://www.embassyworld.com/)
- Flags of All Countries <http://www.wave.net/upg/immigration/flags.html>
- Florida Export Finance Corporation <http://www.dos.state.fl.us/fe/c/>
- International Association of Convention and Visitors Bureaus [www.iacvb.org](http://www.iacvb.org)
- Jay Malina International Trade Consortium [ITC] [www.miamidade.gov/itc](http://www.miamidade.gov/itc)
- Office of the United States Trade Representative [www.ustr.gov/](http://www.ustr.gov/)
- Online Metric Conversion [www.onlineconversion.com/](http://www.onlineconversion.com/)
- Translator Services [www.translator.go.com/](http://www.translator.go.com/)
- United States Agency for International Development [USAID] <http://www.usaid.gov/>
- United States Bureau of Customs [www.customs.gov/](http://www.customs.gov/)
- United States Council for International Business [www.uscib.org](http://www.uscib.org)
- United States Department of Commerce [www.doc.gov/](http://www.doc.gov/)
- United States Department of Commerce [International Trade Association] <http://www.ita.doc.gov/>
- US Dept. of Commerce [National Technical Information Service - Electric Current Abroad] [www.ntis.gov/](http://www.ntis.gov/)
- United States Department of Commerce [Trade Compliance Center] [www.export.gov/tcc](http://www.export.gov/tcc)
- United States Department of Commerce [Trade Information Center] [www.ita.doc.gov/](http://www.ita.doc.gov/)
- United States Department of Labor [www.dol.gov/](http://www.dol.gov/)
- United States Department of Labor [Occupational Safety and Health Administration] [www.osha.gov/](http://www.osha.gov/)
- United States Internal Revenue Service [www.irs.gov](http://www.irs.gov/)
- United States Department of State [www.travel.state.gov/](http://www.travel.state.gov/)
- United States Small Business Administration [www.sba.gov/](http://www.sba.gov/)
- United States Trade and Development Agency [www.tda.gov/](http://www.tda.gov/)
- Universal Currency Converter [www.xe.net/ucc/](http://www.xe.net/ucc/)
- World Clock [www.timeanddate.com/worldclock/](http://www.timeanddate.com/worldclock/)
- World Electric Current Guide <http://kropla.com/electric2.htm>

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