



SECTION 1: HOST-YEAR ORGANIZATION AND TIMELINES

SECTION 2: ABOUT NCAPEC/PSR

SECTION 1: HOST-YEAR ORGANIZATION AND TIMELINES

Recommendations for setting up the Host-year organization and general pre-Summit timeline for Host-year planning and execution.

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- CEO Summit Timeline
 - CEO Summit: Execution
 - Summit Host: Internal Organization Chart
 - Secretariat Management Team
 - Key Stakeholders

APEC CEO SUMMIT TIMELINE

Phase 1

Begin 2.5 years in advance

Define internal organizational structure and leadership positions (ABAC/Summit Chairs, Secretariat CEO, ABAC ED and Summit COO); Begin coordination with National Organizing Committee; Initiate budgeting and planning.

Fill COO position; Identify Strategic Partner(s) and key stakeholders.

Begin early coordination with government on calendar, national objectives, structure of interaction/communication with government.

Identify delegation to attend CEO Summit with Strategic Partner(s) to study best practices.

Develop top-line budget and timeline; identify venue options.

Develop Summit program theme and concept (in coordination with ABAC and government); identify key anchor speakers to target.

Phase 2

Begin 2 years in advance

Advanced preparation: marketing, branding, communications, calendaring, financials and vendors.

Create Summit logo and define event look and feel.

Create local APEC Business Host Committee and International Sponsor "Advisory Board" for early identified Sponsors.

Identify top-tier vendors (communications, production, transportation, logistics), finalize venue selection and develop full budget.

Develop Sponsorship Packages; lock in initial Sponsors.

Begin strategic communications with key stakeholders: share expectations and status reports on program and event planning.

Identify and develop invitation process for anchor speakers.

Phase 3

Begin 1.5 years in advance

Formal global launch.

Prepare formal Sponsorship invitation packets and Summit brochure for dissemination at the upcoming CEO Summit.

Prepare delegate giveaway and promotional video for presentation during closing session of APEC CEO Summit


Plan Q1 roadshows with Strategic Partner(s).

Lock in 1-2 anchor speakers and Platinum Sponsors.

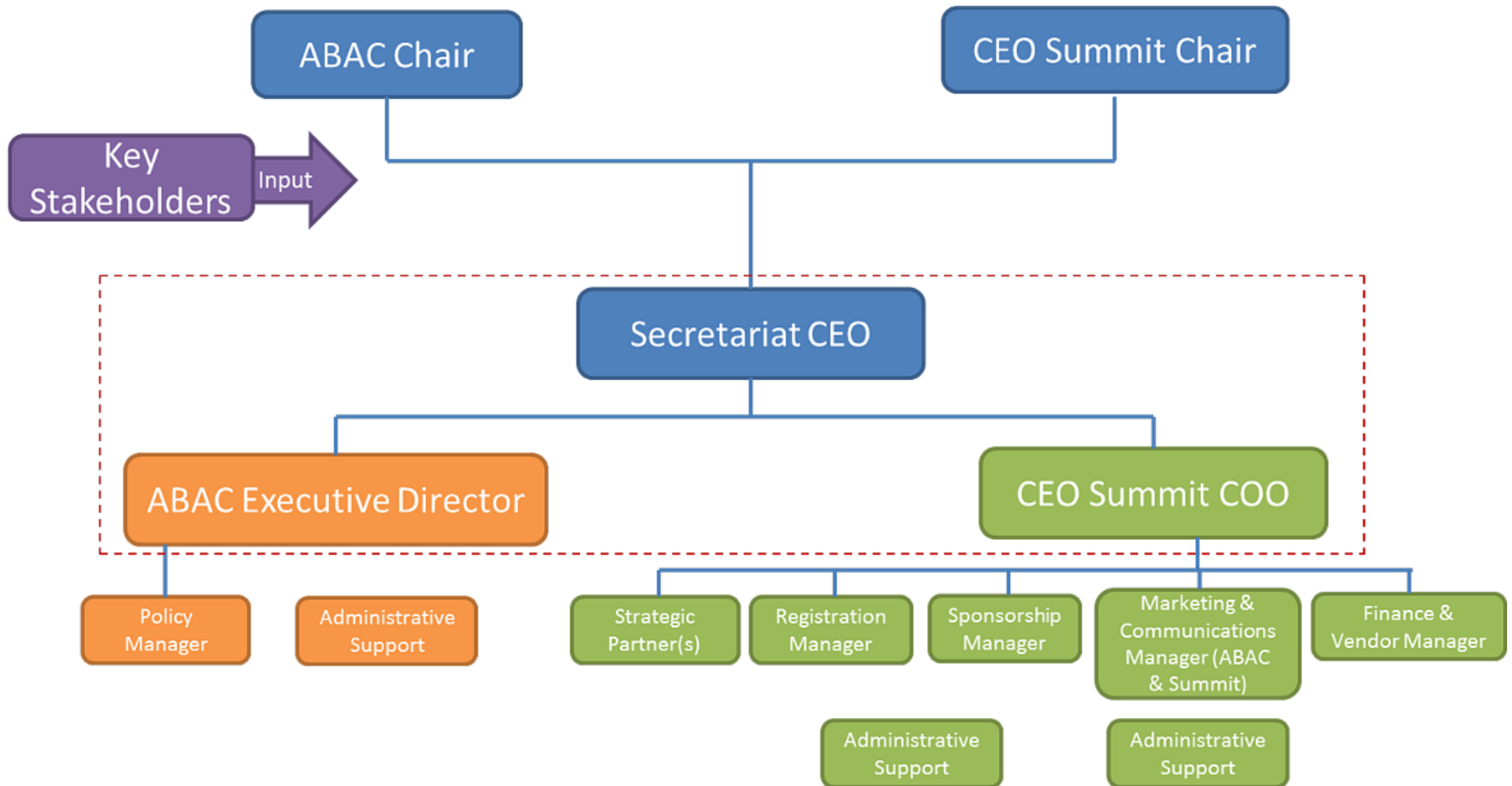
Build website with a "Request Invitation" function ready for launch during the 2017 CEO Summit; launch social media and communications plan.

CEO SUMMIT PHASE 4: EXECUTION

TOP-LINE ITEMS FOR CONSIDERATION

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- International Sponsor Management, Host Economy Sponsor Recruitment & Management
 - Key Stakeholder Meetings / Briefings
 - Finance / Budgeting, Vendor Selection & Management
 - Hotels and Accommodations
 - Registration, Back-end Administration
 - Airport Logistics / Processes
 - Media, Marketing & Communications
 - Venue Usage Plan, Food & Beverage
 - Security (Venue / Local / National)
 - Production, Signage, and On-site Technical Support
 - Program & Speaker Management
 - Leader Dinners
 - Transportation Plan & VIP Transportation
 - Summit Receptions / Socials / Dinners
 - Accompanying Persons Program
 - Delegate Support & Briefing Books
 - Volunteers

SUMMIT HOST: INTERNAL ORGANIZATION CHART



SECRETARIAT MANAGEMENT TEAM

RESPONSIBILITIES

SECRETARIAT CEO

Operational Oversight - Strategic Direction and Execution

- Budget creation and management
- Coordination with Host Government entities
- Local/International Sponsorship recruitment
- Marketing/branding and communications
- Management of all Secretariat staff
- Identification and creation of year-round opportunities for local/international private sector
- Oversight of Summit program, ABAC meetings, media, logistics
- Updates to ABAC and CEO Summit Chairs, Key Stakeholders

CEO SUMMIT COO

Operational Execution: Strategic Partners, Vendors, Registration/Invitations, Venue, Logistics, Program, Communications/Marketing

- Program - content development, speaker/moderator selection and management
- Primary Foreign Embassy contact for Leader invitations, planning, logistics, site-visits
- Sponsor Advisory Board management
- Strategic Partner coordination; vendor and logistics management
- Delivery of Sponsor Benefits; coordination of marketing and communications
- Invitation lists and registration oversight
- Budget oversight; management of 5-8 staff


ABAC EXECUTIVE DIRECTOR

ABAC Coordination, Leadership and Management

- Direction and coordination with ABAC International Secretariat
- Settling Dates/Schedules for ABAC Meetings
- Manage ABAC Staffers process, including chairing Staffers Meetings
- Coordination with Working Group Lead Staffers
- ABAC Report Development, execution of Report to Leaders and Letters to Ministers
- Chair support (talking points, speeches, media appearances)
- Manage Support Staff


KEY STAKEHOLDERS

GOVERNMENT




Government is responsible for official APEC meetings during Leader's Week throughout the Host year. Close coordination with ABAC and CEO Summit from the onset of planning is a key element to success. From Head-of-State arrangements and Ministerial Meetings to security and local government relations, it is important that a two-way flow of information be maintained to ensure clarity and seamless coordination.

APEC HOST COMMITTEE (Private Sector)



This committee is comprised of the top business leaders from the Host economy who are typically also CEO Summit Sponsors. Their role is to assist with fundraising, make connections to speakers and government, and offer program guidance and expertise. Quarterly calls during the initial planning stages and monthly calls during the host year will keep these advisers well-informed.

INTERNATIONAL SPONSOR ADVISORY BOARD



The Sponsor Advisory Board (sometimes referred to as "Chairman's Circle") is made up of senior representatives from each international (non-domestic) sponsoring company. Its objective is to provide a dynamic avenue for providing input on program and sharing updates on logistics as well as to create meaningful and lasting relationships with the CEO Summit Chair and Host Economy businesses.

SECTION 2: ABOUT NCAPEC AND PSR

An introduction to NCAPEC and PSR and our history of engagement through the years in the APEC CEO Summit and ABAC.

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- About
 - Achievements
 - A Strategic Partnership
 - Sponsorship
 - Program
 - Network
 - Organization

ABOUT

WHO WE ARE

The National Center for APEC (NCAPEC) has been coordinating and supporting U.S. private sector engagement in APEC (and at all of the APEC CEO Summits) since the first APEC Leaders Meeting in 1993, and has served as the Secretariat for the U.S. ABAC since 1996.

When the U.S. private sector chaired APEC in 2011, NCAPEC served as the host organization, coordinating all business events including the CEO Summit, and ABAC IV meetings. In 2011, the CEO Summit was reinvented, focusing on developing a superlative program, with robust opportunities for interaction and engagement between CEOs and Leaders that would draw the top tier of global Chief Executives, ensuring the Summit's success.

The 2011 CEO Summit in Honolulu attracted more global CEOs and greater sponsorship than ever before, provided groundbreaking new elements such as the Leader Dinners (for more intimate interactions with Leaders), and media moderators were engaged, bringing additional coverage from the major media outlets. We were driven by a commitment to make the program and VIP opportunities unique and plentiful, ensuring that the Chief Executives' schedules were densely packed with high-value experiences for CEOs and Leaders as well.

Both Russia (2012) and Indonesia (2013) asked NCAPEC to be Strategic Partners to assist in all aspects of organizing their CEO Summits. In early 2013, NCAPEC created Pacific Summit Resources, LLC (PSR), to provide program and event consulting, sponsor recruitment and management, and the planning and execution of VIP events. Since 2011, every host economy has engaged NCAPEC/PSR. In addition to Vietnam, NCAPEC/PSR is also in discussions with Papua New Guinea and Chile to assist with their host years in 2018 and 2019 respectively.



"NCAPEC was an important partner to ABAC Philippines and the CEO Summit organizers in 2015. NCAPEC's contribution to the success of the CEO Summit has been immeasurable and substantial, building on its prominence and relevance throughout the years. During the 2015 hosting year, its support included sponsorship generation, brand awareness and goodwill promotion, as well as subject matter and speakers support -- all done with utmost professionalism and excellence."

- Doris M. Ho
President & CEO, Magsaysay Group of
Companies
ABAC 2015 Chair



ACHIEVEMENTS

HISTORICAL HIGHLIGHTS

- Coordinator of U.S. business participation in CEO Summits as the concept evolved over the years from a 60-person roundtable discussion held in 1993 alongside the first APEC Economic Leaders meeting in Seattle/Blake Island, to the multi-day format with attendance in the thousands.

1993-2003

- Strategic partnership with Russia's National Council for APEC; raised \$2.2 of the overall \$2.9 million of international sponsorship revenue; provided program consulting, speaker recruitment, Leader Dinner support, stage management, and emcee/announcer services.
- Consulted on communication and strategy, venue layout, invitation and registration process.
- The Summit in Vladivostok attracted over 1,000 attendees despite the remote location and challenging venue.

2011

2012

- Host and organizer of the APEC China CEO Forum: 2 days, 250 attendees, 13 sponsors which set the stage for outreach to U.S. companies about the CEO Summit.
- Contracted to organize Boao Forum for Asia in Seattle: 3 days, 350 top-level CEO and government attendees. Consulted on program, sponsorship, VIP activities, event planning, communications and branding.
- Exclusive U.S. Partner to the APEC China CEO Summit raising over \$4.3 million in sponsorship revenue. Consulted on program and logistics and delivered sponsor events and benefits.

2013

2014

- Strategic partnership with COMEX Peru for U.S. and Mexico Summit engagement. Consulting on all aspects of event including program and speaker recruitment, sponsorship and event planning.
- Host and organizer of the APEC Executive Forum - San Francisco.
- Road Show events in New York, Washington and Miami.

2015

2016

- Organizer of the 2011 USA APEC CEO Summit – “Refreshed” program and format, focusing on executive-level experience to attract global CEO attendees.
- Over 2,000 attended, the program had top-tier media moderators, an engaging new format including “future flash” insight by well-known thought leaders.
- Leader Dinner Program was created; dinners for 14 Leaders with CEOs in private homes
- Year-round private sector and sponsorship through Executive Dialogue events at Ministerial meetings.

- Creation of Pacific Summit Resources;
- CEO Summit Strategic Partnership with ABAC Indonesia;
- Raised over \$2.8 million from 13 sponsors; provided consulting on program which attracted participation from 11 APEC Leaders.
- Contracted to plan and execute 5 APEC Leader Dinners during the CEO Summit.

- Strategic partner to Philippines CEO Summit organizers. Provided consulting on program and speaker recruitment, event planning and best practices, communications, registration, sponsorship, and VIP activities, including Leader Dinners.
- Raised over \$2.1 million in sponsorship revenue.

A STRATEGIC PARTNERSHIP

WHY NCAPEC/PSR

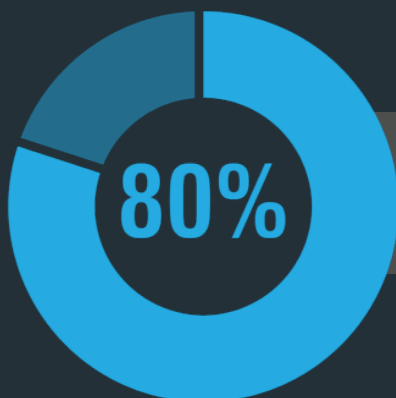
Summit hosting is a complex and multi-tiered effort. As a Strategic Partner, NCAPEC/PSR focuses on providing a wide range of key services designed to streamline your operation, improve efficiency and coordination, and assist with management of many complex support tasks to allow you to focus on your key priorities – delivery of a world-class Summit experience for your economy.

We partner with you to provide your sponsors with a comprehensive sponsorship package and payment management system, combined communications and information channels, and a unified approach to critical summit elements such as registration, logistics, and messaging, as well as program development and management (including functions such as panel development, speaker invitations and preparation, pre-Summit coordination, and so on).

"Choosing the right partner was one of the most critical factors leading to APEC CEO Summit in 2013's success. Not only having the vast experience being involved in the past Summits, the people in NCAPEC/PSR were so resourceful that they would go the extra miles to adapt to the particular vision and objectives that we as the Host Committee set. From planning, marketing, sponsorship, to delivering the highly complex event, we were blessed to have made the right choice of appointing NCAPEC/PSR as our Strategic Partner."

- Ricky Sugianto
APEC CEO Summit 2013, Director

NCAPEC/PSR is a non-profit organization committed to ensuring impactful private-sector engagement in APEC, dedicated first and foremost to the success of our partners' events. We have been recognized for our efforts in support of the long-term success of the CEO Summit and are highly respected for our understanding and expertise in protocol and cultural sensitivity. In addition to the CEO Summit, we have partnered in a range of other events including the Boao Forum for Asia, APEC China CEO Forum and the Global Innovator Conference in Beijing. NCAPEC/PSR has successfully planned and executed VIP dinners for APEC economy Leaders and we offer our clients the benefit of more than twenty years of experience and connections in the Asia Pacific region.



of all CEO Summit
international
sponsorship revenue
(2011-2015) has been
raised by
NCAPEC/PSR
totaling...

\$16,000,000

SPONSORSHIP

RECRUITMENT AND MANAGEMENT

Since 2011, NCAPEC/PSR has recruited and managed all U.S. Company Sponsorships resulting in over \$16,000,000 in APEC CEO Summit Sponsorship revenue – 80% of the overall international sponsorship revenue for all CEO Summits between 2011-2015 combined. We have achieved these results by having a deep understanding of individual company objectives, coupled with our ability to work with our partners to design valuable, revenue-generating sponsorship packages.

By tapping into our vast network of contacts around the globe, we are able to ensure the CEO Summit attracts the attention of decision makers, CEOs and thought leaders. Our strong relationships with companies, organizations, the APEC Business Advisory Council, and senior government officials gives us an extremely broad and deep reach, leveraging true champions of APEC, ABAC and the APEC CEO Summit worldwide.

Companies are eager to engage their teams (especially their local teams) with the current host economy. NCAPEC/PSR facilitates effective communication by organizing both in-bound visits to the host economy with potential sponsors as well as ‘road-shows’ with CEO Summit organizers. These are effective ways for organizers to create relationships, answer questions and hear sponsor objectives, and discuss the economic and political strength of their economy while also promoting the CEO Summit.

"We were very fortunate to have NCAPEC/PSR as a partner to assist us in hosting the APEC CEO Summit in 2014. They provided excellent advice based on their experience with previous Summits, and they did a fantastic job helping us recruit and manage all our US sponsors. They were ideal partners – reliable, responsive, and respectful of our priorities and goals. "

- Sun Xiao

Deputy Director General,
China Chamber of International
Development



SPONSORSHIP

SPONSOR COMPANIES*



*Sponsors of NCAPEC/PSR-organized and/or partnered events.

PROGRAM

KNOWLEDGE & EXPERIENCE

Drawing on our long history of engagement in the Asia-Pacific region and ongoing role as a bridge between government and business in APEC, we are well-positioned to develop an engaging and compelling CEO Summit program that will draw senior-level speakers and participants. Current members of our team have attended every CEO Summit since 1997 and have developed a deep understanding of the elements of a successful program. Under our chairmanship in 2011, we developed a program that featured intimate discussions with global leaders, thought-provoking presentations and panel sessions led by professional media moderators. This became a new standard for international business conferences.

Our ongoing engagement in APEC's public and private sector discussions gives our team keen insights into issues that are on the minds of the region's top business and government leaders. This knowledge enables us to develop a program that highlights issues of importance to the host economy while remaining relevant to participants from around the region. Finally, our excellent connections with leading figures in media, academia, business, and government position us to deliver a program with high-profile speakers, from young entrepreneurs to established thought leaders.

Our role as the ABAC Secretariat for the U.S. since 1996, and attendance at every SOM since 1994, has given us a close working relationship with a wide network of supporting organizations, leading business figures and APEC's governmental representative structure throughout the Asia-Pacific region.



"NCAPEC/PSR's solid grasp of Asia-Pacific policy and business issues, combined with their strong connections with the region's key players, helped us deliver the very successful APEC CEO Summit 2013. With their support, over 1,300 business and thought leaders got engaged with 12 economic leaders – Presidents or Prime Ministers – in a program full with insights and provoking ideas."

- Wishnu Wardhana
APEC CEO Summit 2013, Chairman
ABAC Chair 2013



NETWORK

OUR PARTNERS



*Additional relationships with ABAC members in all 21 economies.

ORGANIZATION

OUR MANAGEMENT TEAM



Monica Hardy Whaley
President

Monica has been a part of the National Center for APEC's executive team since its founding in 1994, and has been President of NCAPEC since 2002. For the U.S. Chairmanship of APEC in 2011, she oversaw all fundraising for the CEO Summit and Host Committee Events. She has attended every APEC CEO Summit since 1997 and provides the strategic direction for the growth of both NCAPEC and PSR. Monica is responsible for membership, fundraising and fiscal management of both organizations.



Alex Parle
Executive Vice President

Alex has been supporting U.S. participation in APEC fora and attending CEO Summits since joining NCAPEC in 2003. Alex served as a senior U.S. staff lead for the APEC Business Advisory Council from 2005 -2014, including a one-year term as ABAC Executive Director in 2011, providing him with unique insights on the policy priorities of companies doing business across the Asia Pacific region. Based on this extensive experience, he advises CEO Summit organizers on program design and execution.



Darcie Vaughan
Vice President of Operations

Darcie has been a part of the NCAPEC/PSR team since the U.S. host year in 2011. She is responsible for management and execution of contracts with Strategic Partners including sponsorship, program, and event consulting for both CEO Summit and other public-private events throughout the year. Darcie is responsible for management of PSR's sponsorship and administrative staff and provides oversight of PSR's operating budget.



Robert Modarelli
Vice President of Strategic Development

Rob joined the National Center for APEC as Policy Director in October of 2006 and served as NCAPEC's Executive Vice President, engaging in every APEC CEO Summit from 2006-2015. In 2011 he served as Chief Operating Officer of the APEC 2011 USA National Host Committee, and coordinated all operations of the budget and support team for the APEC 2011 CEO Summit in Honolulu, Hawaii.