

# GUIDELINES

## FOR CONFERENCE CENTER AND MEETING SPACES



**About The Duke Endowment**

Since 1924, The Duke Endowment has worked to help people and strengthen communities in North Carolina and South Carolina by nurturing children, promoting health, educating minds and enriching spirits.

Located in Charlotte, N.C., the Endowment seeks to fulfill the visionary genius and innovative legacy of James Buchanan Duke, one of the greatest industrialists and philanthropists of the 20th century. Mr. Duke established the Endowment in 1924 with \$40 million. In 1925, it was expanded with an additional \$67 million from his estate.

Governed by a board of trustees, Endowment staff conduct grantmaking according to guidelines in Mr. Duke’s original Indenture of Trust, a legal document that remains relevant and timely after more than 90 years.

In November 2011, Trustees approved the following six Guiding Principles:

We seek to fulfill the legacy of James B. Duke by enriching lives and communities in the Carolinas through children’s services, health care, higher education and rural churches.

**FOLLOW**

**James B. Duke’s philanthropic intent**, using the discretion he gave us to address current circumstances and emerging issues.

**MAINTAIN**

**a commitment to the Carolinas** through grantmaking that strengthens organizations, replicates successful programs and tests innovative approaches.

**DIRECT**

**resources where they will produce the best results** and hold ourselves and our grantees accountable for achieving them.

**PROVIDE**

**ethical leadership** by seeking diverse opinions, fostering new ideas and strategies, and taking appropriate risks.

**BUILD**

**effective relationships with grantees** by listening with respect and understanding, learning about their communities and challenges, and working together to identify potential solutions.

**CREATE**

**opportunities to share information** about successes, failures and lessons learned.

The Endowment has awarded over \$3.4 billion in grants since its inception. With assets of \$3.35 billion, the Endowment is one of the nation's largest private foundations.

**[www.dukeendowment.org](http://www.dukeendowment.org)**  
Get more information about  
our grantmaking.

In addition to grantmaking work in four program areas, the Endowment shares its knowledge by publishing resources for grantees and other service organizations, including information about what we're learning from our work in various publications, reports and evaluations.

### **The Duke Endowment's Conference Facilities**

The Endowment's new headquarters opened August 25, 2014. The headquarters serve not only as an office for Endowment staff, but as a gathering place for our grantees and select non-profits. It is the Endowment's hope that the facilities will attract thought leaders and decision makers from across North Carolina and South Carolina to a hospitable environment, where new ideas and strategies lead to solutions.

**For more information**  
or to schedule a meeting or event,  
please call 704.969.2147  
or email [events@tde.org](mailto:events@tde.org).

Blending advanced conference facilities and state-of-the-art technology with comfortable amenities and a friendly atmosphere, the Conference Facilities help the Endowment advance our Guiding Principles.

### **Use of the Endowment's Conference Facilities**

Primary use of The Duke Endowment's Conference Facilities includes meetings held by Endowment staff and grantee events initiated by the Endowment. Occasionally, eligible grantees may be permitted to use the Conference Facilities for events not related to the Endowment's work. However, those events will be evaluated on a case-by-case basis. Regretfully, the Conference Facilities are not available to organizations that are not eligible to receive Endowment funds.

### **Fees**

Generally, there is no rental charge for use of the Conference Facilities, equipment or parking. Users shall pay the costs associated with catering. Depending on the size of the event and needs, users may also have to pay for off-duty law enforcement officers, third-party AV providers, valet parking and room set-up. For certain events, a fee of \$10.00 per person, per day will be charged to cover incidental expenses.

### **General Rules**

Any group using the Conference Facilities must ensure its event is consistent with its charitable purpose and may not charge attendees a fee to attend the meeting except to cover meeting expenses, i.e., catering, speakers, materials, off-duty law enforcement officers, etc.

The Duke Endowment does not allow fundraising or the sale of products in the Conference Facilities.

For-profit sponsoring organizations may be acknowledged with a one-line logo or acknowledgement of their sponsorship on a brochure or PowerPoint slide.



Organizations hosting an event at the Endowment may not have vendors participate in a meeting without obtaining the prior written approval of the Endowment.

The Endowment’s Conference Center and Meeting Spaces may not be used for:

- Social events such as weddings, holiday parties, graduations, awards programs, retirements and fundraisers.
- Political activity, or by an individual who has announced or has filed for elective office.
- Except for work related to United Methodist churches in North Carolina, activity that advances a particular religious faith or doctrine.

The Duke Endowment is a smoke-free environment.

Absent written permission from The Duke Endowment Communications Department, the use of Conference Facilities does not imply the right to use The Duke Endowment’s name or logo, except to identify the event location.

The Duke Endowment reserves the right to modify these guidelines or to make exceptions at its sole discretion, including on a case-by-case basis.

**Inclement Weather or Other Unforeseen Circumstances**

Use of the Conference Facilities is subject to termination without liability upon the occurrence of any circumstances making it impossible or illegal to provide or use them, including inclement weather (e.g., snow or sleet making roads unsafe to travel), Acts of God, war, government regulations, disaster, strikes, civil disorder or curtailment of transportation facilities. The Endowment will provide notice of such termination as soon as reasonably practical.

**Scheduling**

Organizations who have received approval for use of space may reserve the Mary Duke Biddle Trent Semans Conference Center 6 months in advance of the event date.

Meeting space is secured only after the Endowment has received a signed Conditions of Use form.

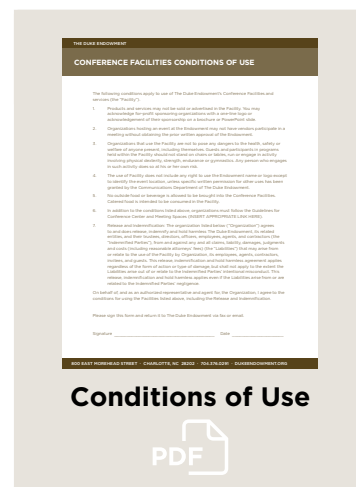
Once use of the space has been approved and a signed Conditions of Use form has been received, the Endowment will provide the event host with an e-mail confirmation and contact information for the Events Manager.

You are encouraged to include the Endowment staff in the early stages of planning for large events.

**General Hours of Event Operation**

Monday — Friday: 8:30 a.m. to 4:30 p.m.

Event hours outside these parameters require special approval.



**Catering**

The Endowment does not offer catering services. Users may work with a list of approved caterers located on the third page of the Guest Meeting Worksheet.

**Serving Alcoholic Beverages**

Alcoholic beverages may only be served at evening events and must be in compliance with the following:

1. The organization having the event must provide a certificate of insurance that confirms it has general liability insurance with a host liquor liability coverage endorsement with coverage limits of no less than \$1 million per occurrence and \$2 million in the aggregate and names The Duke Endowment and [Event Caterer] as additional named insureds. This certificate must be delivered to The Duke Endowment seven (7) days in advance of the scheduled event. Email to [events@tde.org](mailto:events@tde.org). If not provided, alcohol cannot be served.
2. Alcoholic beverages may only be served after 5:00 p.m. and for a maximum of 2 (two) hours.
3. Non-alcoholic beverages and food (minimum of \$10/per person) always must be served when alcoholic beverages are being served.
4. Alcoholic beverages may only be served and consumed in the Conference Facilities. No alcohol may be removed from the building.
5. Only licensed staff of the catering vendor may serve alcohol, and all alcohol served must be purchased from the catering vendor.
6. Events including individuals under the legal drinking age may not be scheduled in the facility at the same time as events during which alcohol is served.
7. The organization may be required to pay for an off-duty law enforcement officer(s), depending on the size of the event.

The event host will be contacted to discuss plans that include alcohol.

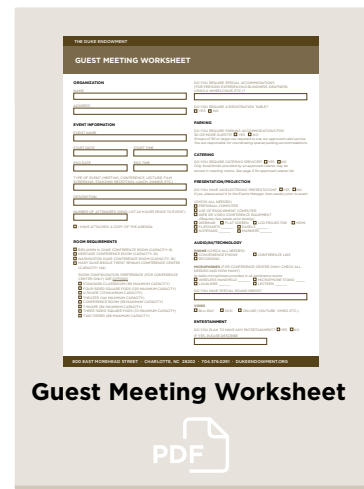
**Complimentary Guest Services**

- Onsite parking
- Audio/visual items outlined in the room details
- Open wireless network
- Small business center with telephone, computer and printer for short print jobs
- Catering by exclusive vendors
- Coat/luggage room

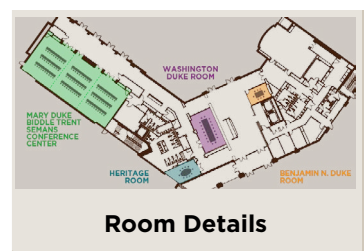
**Technology Overview**

The Endowment’s Conference Facilities offer a wide range of complimentary audio/visual equipment.

Equipment is reserved on a first-come, first-served basis. If an event requires technology that is not available in-house, the event host will be responsible for making arrangements with The Duke Endowment’s required vendor and for covering the costs for equipment, set-up and labor. For specific capabilities, see room details. Pre-event technology meetings are required. Please call the Events Manager at 704.969.2147 for an appointment.



**Guest Meeting Worksheet**



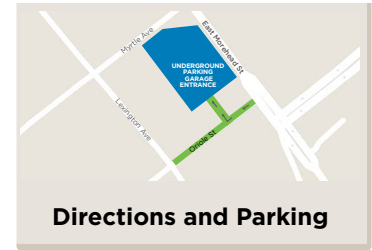
**Room Details**

**ADA Statement**

The Conference Facilities are fully wheelchair-accessible.

**Parking**

Parking is available in the Endowment’s underground parking garage off of Oriole Street and can be used by guests on a first-come, first-served basis.



**Emergency Procedures**

In the event of a fire, follow the exit signs. Endowment staff will direct guests to the designated gathering location. If there is a tornado warning or similar emergency, Endowment staff will direct guests to underground parking shelter in the building.

The Endowment’s first floor meeting space is equipped with an Automated External Defibrillator (AED) device, located just outside the catering kitchen. Calling 911 is the critical first step.

**Media for Event**

If a media outlet plans to cover an event scheduled in the Endowment’s Conference Facilities, please contact our Communications Department at 704.376.0291.

*James B. Duke*

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THE DUKE ENDOWMENT

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800 East Morehead Street  
Charlotte, North Carolina 28202

[dukeendowment.org](http://dukeendowment.org)

04-20-17