



The APEX Event Specifications Guide Template

*Approved by the Convention Industry Council on September 30, 2004
Updated June 2005*

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ACCEPTED PRACTICES

1. The term *Event Specifications Guide* or *ESG (acronym)* should be the industry's official term for the document used by an event organizer to convey information clearly and accurately to appropriate venue(s) and/or suppliers regarding all requirements for an event. This is a four-part document which includes:
 - Part I: The Narrative – general overview of the event.
 - Part II: Function Schedule – timetable outlining all functions that compose the overall event.
 - Part IIIa: Function Set-up Order – specifications for each function that is part of the overall event (each function of the event will have its own Function Set-up Order).
 - Part IIIb: Function Set-up Order (Exhibitor Version) – specifications for each booth/stand that is part of an exhibition.

This is based on accepted terminology defined in the *APEX Industry Glossary*. The *Glossary* defines an event as “an organized occasion such as a meeting, convention, exhibition, special event, gala dinner, etc. An event is often composed of several different yet related functions.” The *Glossary* also defines a function as “any of a group of related organized occasions that contribute to a larger event” (e.g. registration area, coat check, rehearsal, outside display, seating area, office, poster session, green room, emergency information area, breakout session, etc.).

2. The *APEX ESG* should be the industry's accepted format for the conveyance of information regarding the requirements of an event.
3. The following fields in the *Narrative* portion of the *ESG* require information input and are designated by *. An acceptable input is “Not Applicable” or “NA”:

Date Originated

Date Revised

Event Profile

- Event Name
- Event Organizer/Host Organization Mailing Address Line 1
- Event Organizer/Host Organization City
- Event Organizer/Host Organization State/Province
- Event Organizer/Host Organization Postal/Zip Code
- Event Organizer/Host Organization Country
- Event Organizer/Host Organization Phone
- Event Type

Dates & Times

- Published Event Start Date
- Published Event End Date
- Pre-Event Meeting
 - Day & Date
 - Time
 - Location
 - Attendees
- Post-Event Meeting
 - Day & Date
 - Time
 - Location
 - Attendees

Key Event Contacts

- Complete information for a minimum of one (1) key event contact person

Attendee Profile

- Accessibility/Special Needs

Housing

- Room Block(s) - Complete information for a minimum of one (1) Hotel or Housing Facility
- Reservation method
- Accessibility/Special Needs Rooms

Safety & Security

- Medical/Emergency Instructions
 - Key Event Organizer/Host Organization Contact in Case of Emergency/Crisis
 - Crisis & Emergency Instructions
-

- On-site Communications
- Hours of surveillance
- Areas for surveillance
-
- Food & Beverage
 - Special Requirements
 - Catered Food & Beverage Total Expected Attendance Chart
- Transportation
 - Attendee Shuttle Provided
- Shipping/Receiving
 - One line of the Shipping Grid
 - Expected Outbound Shipping Requirements
- Billing Instructions
 - Group is tax-exempt
 - Room & Tax to Master
 - Incidentals to Master
 - Guests Pay on Own
 - Negotiated Items/Services
 - Final Bill to Be Provided to (contact name)
 - Final Bill to Be Sent to (mailing address)
- Authorized Signatories
 - Complete information for a minimum of one (1) authorized signatory

4. There should be various stages in the evolution of the *APEX ESG* and the processes used to complete it:

Stage I - The form will be a word processing file and be completed manually. It will be shared by event organizers and venues/suppliers in electronic and/or hard copy form.

- Every facility and vendor involved in an event should receive a complete copy of the final ESG.
- Each ESG will include dates for pre- and post-event meetings to review and revise information.
- The ESG should be shared in a way that, when changes are made, they can be properly tracked and identified. Specifically, when a change is made from the original published document, a revised date should be inserted, and any change should be highlighted and dated within the document.
- The Function Set-up Order (Exhibitor Version) should be used by exhibitors to communicate booth/stand needs to show management and other vendors. Additionally, show managers can use the form to guide exhibitors through the process of determining and relaying their set-up requirements.
- The suggested timetable for the completion and sharing of the information contained in this document is dependent upon the size and complexity of the meeting, convention, or exhibition.
 - **At a minimum**, an event organizer should send the ESG to all facilities and vendors four weeks prior to the start of the event.
 - **Also, at a minimum**, facilities and vendors should respond with completed orders [production schedules, Banquet Event Orders (BEOs), etc.] no later than two weeks prior to the event.

While these are recommended guidelines, the needs of each facility and vendor will vary. Event organizers should confer with suppliers to determine the timeline and deadlines for this information. Also, all parties should consult the relevant contract because that could override any recommendation in this document.

Stage II - When industry-related software is updated and new software is developed, programmers will ensure that the APEX data map is referenced so that all data fields are defined correctly and are able to efficiently capture, store, and share information from the APEX ESG. This will allow for more automated sharing and updating of the report.

5. The Convention Industry Council will annually convene a special committee of professionals from across the meetings, conventions, and exhibitions industry to review all recommendations to the contents of the APEX Event Specifications Guide that have been received in the preceding year. This special committee will consult and confirm that changes to the report are required. It will then make a formal recommendation to the Convention Industry Council for action.

APEX EVENT SPECIFICATIONS GUIDE (ESG) TEMPLATE

Instructions for Use

The *ESG* is a written document that is all inclusive of event details. It includes three sections: 1) Narrative 2) Function Schedule and 3) Function Set-up Order. The following templates will assist event organizers in compiling complete information for a venue partner and contractor/supplier partners. Note the following:

1. Required Information: Several fields require information input. These items are designated by *.
2. Every function must have its own Function Set-up Order.
3. Every function must have a number. All diagrams, photos, sign copy, etc. refer to the function number at all times. When a new function is added, it is at the discretion of the planner whether to order in sequence, or to use "intermediate numbers." Anything other than whole numbers must be formatted as 1a, 1b, 1c, etc. When a function in sequence is cancelled, the function number should not be reassigned.
4. Every section may not apply for every event.
5. Changes & Revisions: ESGs should be shared in a way that, when changes are made, they can be properly tracked and identified. Specifically, when a change is made from the original published document, a revised date should be inserted, and any change should be highlighted and dated within the document.
6. The Function Set-up Order (Exhibitor Version) should be used by exhibitors to communicate booth/stand needs to show management and other vendors. Additionally, show managers can use the form to guide exhibitors through the process of determining and relaying their set-up requirements.

PART I – Narrative

Date Originated*: 10/2/2017

Date Revised*: 10/3/2017

Repeat for additional revisions as necessary.

A. EVENT PROFILE

Event Name*: Off To Oz

Event Organizer/Host Organization: The Ozians

Event Organizer/Host Organization Phone*: 434-851-7270

Event Organizer/Host Organization City*: Harrisonburg

Event Organizer/Host Organization State/Province*: Virginia

Event Organizer/Host Organization Postal/Zip Code*: 22807

Event Organizer/Host Organization Country*: United States of America

Event Organizer/Host Organization Web Address: lower2lm@dukes.jmu.edu

Event Web Address: <http://sites.jmu.edu/WizardOfOzFA17>

Event Organizer/Host Organization Overview (*mission, philosophy, etc.*): To create a functional team that values communication in order to provide our guests with memorable experiences

Event Objectives: A successful attendance turnout, smooth transitions throughout the event day, and a memorable evening for our guests.

Event Scope: *Drop Down Options:*
 Citywide
 Single Venue
 Multiple Venue
 Other: _____

Event Type*: *Drop Down Options:*

<input type="checkbox"/> Board Meeting	<input type="checkbox"/> Sales Meeting
<input type="checkbox"/> Committee Meeting	<input type="checkbox"/> Shareholders Meeting
<input type="checkbox"/> Customer Event	<input checked="" type="checkbox"/> Special Event
<input type="checkbox"/> Educational Meeting	<input type="checkbox"/> Team-Building Event
<input type="checkbox"/> General Business Meeting	<input type="checkbox"/> Training Meeting
<input type="checkbox"/> Incentive Travel	<input type="checkbox"/> Trade Show
<input type="checkbox"/> Local Employee Gathering	<input type="checkbox"/> Video Conference
<input type="checkbox"/> Product Launch	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Public/Consumer Show	

Event Frequency: *Drop Down Options:*
 One Time Only
 Biennial
 Annual
 Semi-Annual
 Quarterly
 Monthly
 Other: _____

Event is mandatory for attendees: Yes No

Spouses & Guests are invited to attend: Yes No

Children are invited to attend: Yes No

Other Event Profile Comments: _____

B. KEY DATES, TIMES, & LOCATIONS

Refer to the complete Schedule of Events (Part II of the ESG) for complete details on all functions and scheduled activities.

Primary Event Facility Name: JMU Festival Ballroom

Event Location City: Harrisonburg

State/Province: Virginia

Country: United States of America

Published Event Start Date*: February 10, 2018

Published Event End Date*: February 10, 2018

Pre-Event Move-in & Set-up Required: Yes No

If Yes, Specific Schedule Will Be Provided By: Bridget Cook

Other Dates & Times Comments: _____

e.g. registration desk hours, daily review meetings

C. KEY EVENT CONTACTS

Use this section to list all key personnel for the event (e.g. staff, exhibits manager, general services contractor, A/V company, security company, preferred shipper).

Event Organizer/Host Organization Contacts

Name: Lauren Lowery Title: Reception Manager	Telephone-434-851-7270 Email:lower2lm@dukes.jmu.edu	Description of Responsibilities:Liaison for Professor Lind,Reserve study rooms and come up with meeting agenda	Location During Event: Festival Ballroom/On site	Emergency Contact? 434-426-1032
Name: Rachel Rowley Title: Dining Manager	Telephone- 804-517-7486 Email-rowleyra@dukes.jmu.edu	Description of Responsibilities:Knowledge of dining set-up and serving styles, Ability to lead staff through the dining process. Resolving any grievances in the dining room	Location During Event: Festival Ballroom	Emergency Contact? 804-317-5916
Name: Bridget Cook Title: Reception Manager	Telephone: 267-294-8291 Email:cook2bm@dukes.jmu.edu Mobile Phone	Description of Responsibilities: Liaison for Festival, Handling greeting guests, leading and monitoring reception team, creating reception shift schedules	Location During Event: Festival Ballroom	Emergency Contact? 571-309-4828
Name: Rachael Smith Title: Dining Manager	Telephone: 703-424-0818 Email-smith7ra@dukes.jmu.edu	Description of Responsibilities: Inspecting the dining room and staff uniforms to ensure cleanliness, liaison between dining room and kitchen staff, making sure that the guests are provided with excellent service, creating dining shift schedules	Location During Event: Festival Ballroom	Emergency Contact? 703-966-8724
Name: Katie Gettler Title: Back of House Manager	Telephone: 703-955-6431 Email:gettlekc@dukes.jmu.edu Mobile Phone: 703-955-6431	Description of Responsibilities: Liaison to Aramark, ensure there is proper communication between back and front of house, ensure all food is prepared and served correctly	Location During Event: Festival Ballroom, Back of House room	Emergency Contact? 703-955-6431

Supplier Partner Contacts

