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## APEX RFP Workbook

### Instructions

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#### Introduction

The **APEX RFP Workbook** offers planners a way to keep the most common RFPs associated with a convention, exhibition or event in one convenient location.

The new **APEX RFP Workbook** takes a streamlined approach, removing as much unnecessary information as possible, and providing simple, drop-down menus and auto-populating fields where appropriate.

The Workbook is divided into six individual tabs:

#### **PART A**

A **General Information** sheet containing all of the general information about the event, such as theme, organizer, contact information, etc. Some of this information will populate into fields in other sheets in the workbook.

General Information

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#### **PART B**

A **series of RFP** sheets for entering detailed information for various facility and service needs. Some information will be pulled from the General Information sheet into these sheets.

Single Facility

Citywide / Destination

Event Technology/AV

DMC & Transportation

Official Service Contractor

**Complete RFP = Part A + the appropriate Part B**

#### Navigation

You can navigate between fields using the TAB key. Fields that are automatically populated cannot be changed with your own text, however, you will not be able to revert the field to the automatic formulas.

#### Auto-Calculation Fields

There are a number of tables in the APEX RFP Workbook that automate the completion process in the Single Facility and Citywide/Destination sheets. Generally, fields that are shaded blue are

Day of Week	Wed	Thu	Fri	Sat	Day 5	Day 6	Day 7	Total
Day or Date	3/5/2014	3/6/2014	3/7/2014	3/8/2014				
Single/Double	75	100	100	50				325
Double/Double								0
Suites								0
Total	75	100	100	50	0	0	0	325
% of Peak	75%	100%	100%	50%	0%	0%	0%	
Guests								

## Macros

You must have macros enabled to use this tool. For assistance in enabling macros, please refer to the your spreadsheet program.

## APEX Standards Review Council

The RFP workbook was created by the APEX Standards Review Council and the Convention Industry Council.

MaryAnne Bobrow, Bobrow and Associates; Vita Feurstein, IEEE; Kevin Kamenzind, Phoenix Convention Visitors Bureau; Lisa Laubgross, Booz Allen Hamilton; Lawrence Leonard, Convention Industry Council; McPhee, Experient Sales Network; Madelyn Marusa, PRA Destination Management; Charles M. O'Shawn, O'Connell; Dave Peckinpugh, Martiz Travel; Glen Ramsborg, Kendall College School of Management; Anne Roth, IHG Global Sales; Stuart Ruff, International Trademark Association;

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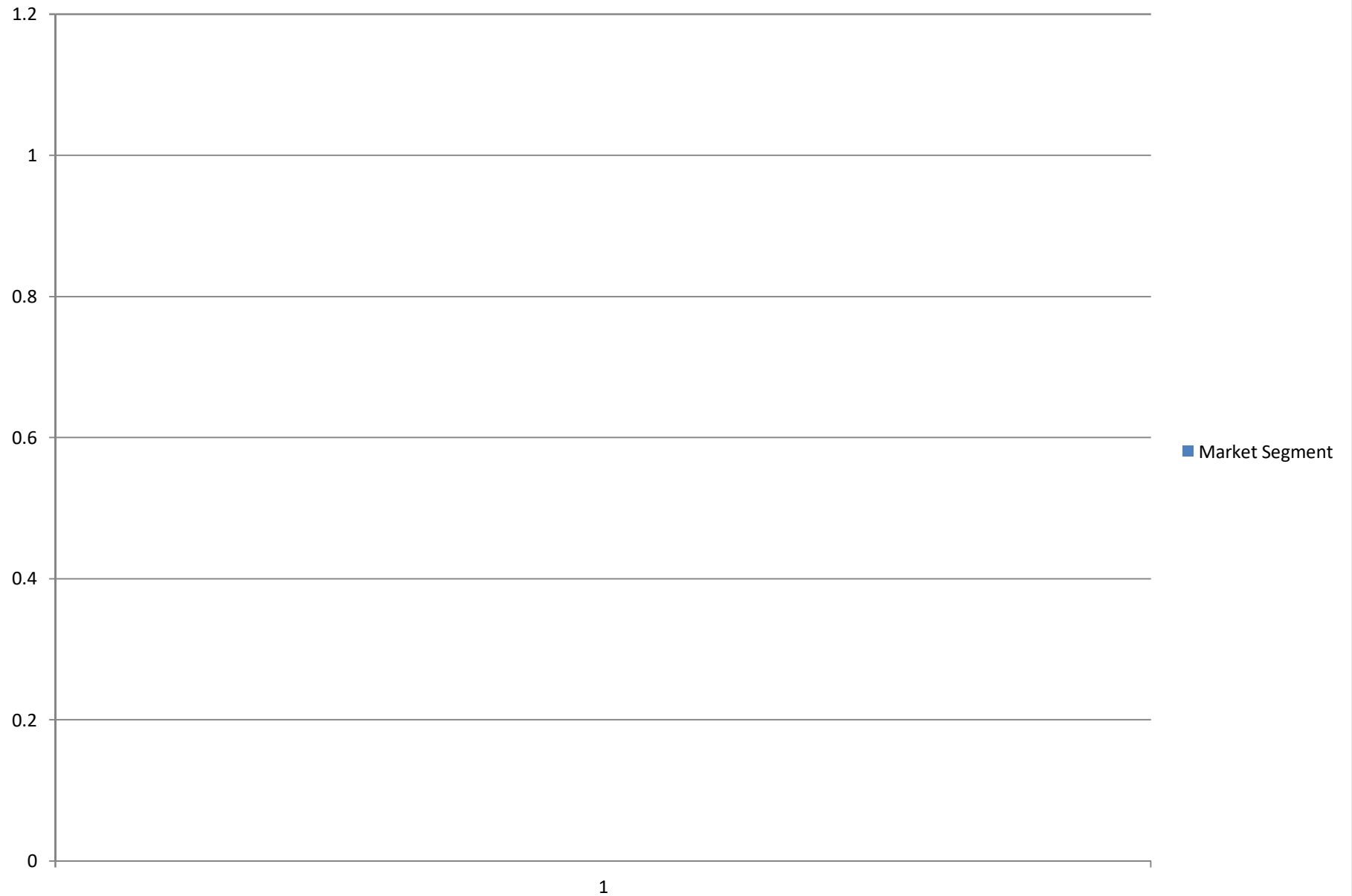
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ANY AND ALL

# Market Segment



**APEX RFP Workbook**  
**General Information Section**

Event Name

**1. CONTACT INFORMATION**

**Hosting Organization**

Organization Name

Address

City

State/Province

ZIP/Postal Code

Country

Telephone

Fax

Web address

**Event Organizer (Third Party)**

(if different from Host organization)

Organization Name

Address

City

State/Province

ZIP/Postal Code

Country

Telephone

Fax

Web address

**Key Contact**

Name

Title

Address

City

State/Province

ZIP/Postal Code

Country

email address

Telephone

Mobile

Fax

**2. EVENT PROFILE**

Market Segment

Total Expected Attendance

Organization Overview

<b>Event Overview / Description</b>	
<b>Event Goals / Objectives</b>	
<b>Event Theme</b>	
<b>Attendee Demographic Profile</b>	
<b>Accessibility/Special Needs</b>	

### 3. EVENT HISTORY

**APEX Post Event Reports** \_\_\_\_\_

Facility Name	City, State/Province, Country	Start Day & Date	End Day & Date	Attendance (Total)	Room Nights (Total)	F&B Spend (Total)

### 4. RFP INFORMATION

<b>RFP Decision Process</b>	Information on the decision process used to select the winning proposal is entered in this field on the General Information sheet. It can also be edited on individual worksheets.
<b>RFP Special Requirements</b>	Special requirements for this RFP are entered in this field on the General Information sheet. This field will give guidance on special terms or conditions required by vendors, such as security clearances, payment terms, etc in order to provide goods or services for the event. It can also be edited on individual worksheets.
<b>RFP Submission Instructions</b>	Special instructions for this RFP are entered in this field on the General Information sheet. This field will give guidance on the number of copies of responses to submit (if hard copy), sales kits needed, etc in order to properly tender a proposal to provide services for the event. It can also be edited on individual worksheets.
<b>RFP Preferred Method of Communication</b>	Instructions on the preferred method of communication (email, etc) are entered in this field on the General Information sheet. It can also be edited on individual worksheets.

### 5. EVENT SPACE REQUIREMENTS

Day / Date	Function Type	Setup	# Attendees	Start Time	End Time	24 Hr Hold

## 6. CONFIDENTIALITY

Maintain as proprietary and confidential all information concerning GROUP/EVENT and its affiliated groups including any intellectual property. In addition, this Request for Proposal or any resulting contract shall not be copied, reprinted, quoted, or in any way transmitted or displayed, except where required by law, without the written permission of GROUP/EVENT.

## 7. STATEMENT OF COST

All costs and expenses related to preparation, completion and submission of responses to this Request for Proposals are the sole responsibility of the respondent.



**APEX RFP Workbook**  
**Single Facility RFP Section**

Event Name

**1. CONTACT INFORMATION**

**Hosting Organization**

0  
Organization Name  
0  
Address  
0 0 00000  
City State/Province ZIP/Postal Code  
0  
Country  
-  
Telephone Fax  
0  
Web address

**Event Organizer (Third Party)**

(if different from Host organization)

0  
Organization Name  
0  
Address  
0 0 00000  
City State/Province ZIP/Postal Code  
0  
Country  
-  
Telephone Fax  
0  
Web address

**Key Contact**

0  
Name  
0  
Title  
0  
Address  
0 0 00000  
City State/Province ZIP/Postal Code  
0  
Country  
0  
email address  
- -  
Telephone Mobile Fax

**2. EVENT PROFILE**

Market Segment 0

Total Expected Attendance 0

Event Overview / Description 0

Event Goals / Objectives 0

Attendee Demographic Profile 0

Accessibility/Special Needs 0

### 3. ROOM BLOCK

Desired Dates

Start	End	Pattern
First Choice		
Second Choice		
Third Choice		

Dates Flexible? Yes

Pattern Flexible? Yes

Dates to Avoid

--

Desired Room Rate Range

--

Rate Net or Commissionable?

Net

Room Rate History

Year	Rate	Notes

Room Block

Day of Week	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Total
Day or Date								
Single/Double								0
Double/Double								0
Suites								0
<b>Total</b>	0	0	0	0	0	0	0	0
% of Peak	0%	0%	0%	0%	0%	0%	0%	

Concessions Requested

--

### 4. EVENT SPACE REQUIREMENTS

See General Information, 5 - Event Space Requirements

## 5. EVENT HISTORY

APEX Post Event Report Available? \_\_\_\_\_

Facility Name	City, State/Province, Country	Start Day & Date	End Day & Date	Attendance (Total)	Room Nights (Total)	F&B Spend (Total)

## 6. RFP INFORMATION

RFP Issued Date \_\_\_\_\_

RFP Decision Date \_\_\_\_\_

**RFP Decision Process** Information on the decision process used to select the winning proposal is entered in this field on the General Information sheet. It can also be edited on individual worksheets.

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**RFP Preferred Method of Communication** Instructions on the preferred method of communication (email, etc) are entered in this field on the General Information sheet. It can also be edited on individual worksheets.

**APEX RFP Workbook**  
**Citywide or Destination RFP Section**

Event Name

**1. CONTACT INFORMATION**

**Hosting Organization**

Organization Name  
  
Address  
    
City State/Province ZIP/Postal Code  
  
Country  
- -  
Telephone Fax  
  
Web address

**Event Organizer (Third Party)**

(if different from Host organization)

Organization Name  
  
Address  
    
City State/Province ZIP/Postal Code  
  
Country  
- -  
Telephone Fax  
  
Web address

**Key Contact**

Name  
  
Title  
  
Address  
    
City State/Province ZIP/Postal Code  
  
Country  
  
email address  
- - -  
Telephone Mobile Fax

**2. EVENT PROFILE**

Market Segment   
Total Expected Attendance   
Show Type   
Event Overview / Description

Event Goals / Objectives 0

Attendee Demographic Profile 0

Desired Dates

Start	End	Pattern
		First Choice
		Second Choice
		Third Choice

Dates Flexible? \_\_\_\_\_

Pattern Flexible? \_\_\_\_\_

Dates to Avoid

--

Locations Under Consideration

--

Recent/Upcoming Locations for Meeting

Year	Location

### 3. ROOM BLOCK

Room Block

Day of Week Day or Date	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Total
# Single/Double								0
# Double/Double								0
# Suites								0
# Staff Rooms								0
<b>Total</b>	0	0	0	0	0	0	0	0
% of Peak	0%	0%	0%	0%	0%	0%	0%	

Desired Room Rate Range

--

Rate Net or Commissionable?

--

Room Rate History

Year	Rate Range	Notes

Headquarter Hotel Requirements

--

Accessibility/Special Needs

Housing Method

#### 4. EVENT SPACE REQUIREMENTS

*See General Information, 5 - Event Agenda*

#### 5. EXHIBIT SPACE REQUIREMENTS

GSF/GSM Required

Move-in days (#)

Show days (#)

Move-out days (#)

Minimum Ceiling Height

Other Special Requirements

#### 6. EVENT HISTORY

APEX Post Event Report Available?

##### Most Recent Room Pick-Up

City	Year		1	2	3	4	5	6	Total
		Pick Up							0
		% of Peak	0%	0%	0%	0%	0%	0%	
		Pick Up							0
		% of Peak	0%	0%	0%	0%	0%	0%	
		Pick Up							0
		% of Peak	0%	0%	0%	0%	0%	0%	

## 7. CONTRACTED VENDOR RELATIONSHIPS

General Service Contractor \_\_\_\_\_

Housing Company \_\_\_\_\_

AV Company \_\_\_\_\_

Transportation Company \_\_\_\_\_

Other \_\_\_\_\_

## 8. OTHER REQUIREMENTS

Concessions Requested

Special Off-Site Venue Requirements

Other Special Requirements

## 9. RFP INFORMATION

RFP Issued Date \_\_\_\_\_

RFP Decision Date \_\_\_\_\_

RFP Decision Process Information on the decision process used to select the winning proposal is entered in this field on the General Information sheet. It can also be edited on individual worksheets.

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RFP Preferred Method of Communication Instructions on the preferred method of communication (email, etc) are entered in this field on the General Information sheet. It can also be edited on individual worksheets.

**APEX RFP Workbook**  
**Event Technology & AV RFP Section**

**Event Name**

**1. CONTACT INFORMATION**

**Hosting Organization**

Organization Name  
  
Address  
    
City State/Province ZIP/Postal Code  
  
Country  
- -  
Telephone Fax  
  
Web address

**Event Organizer (Third Party)**  
(if different from Host organization)

Organization Name  
  
Address  
    
City State/Province ZIP/Postal Code  
  
Country  
- -  
Telephone Fax  
  
Web address

**Key Contact**

Name  
  
Title  
  
Address  
    
City State/Province ZIP/Postal Code  
  
Country  
  
email address  
- - -  
Telephone Mobile Fax

**2. EVENT PROFILE**

**Start Date**

**End Date**

**Location (City, State/Prov. Country)**

**Facility**

**Union Contract in Place at Facility?**

**Market Segment**

**Total Expected Attendance**



Event Overview / Description 0

Event Goals / Objectives 0

Attendee Demographic Profile 0

Accessibility/Special Needs 0

### 3. EVENT AGENDA

#### Standard Breakout Room AV Equipment

List all standard equipment provided in a breakout room, for example: Data projector, screen (size appropriate for room), podium microphone, 2 x wireless lav mics.

Day	Date	Event	Capacity (#)	Standard Equipment?	Additional AV Requirements

### 4. EVENT TECHNOLOGY HISTORY

APEX Post Event Reports Available? \_\_\_\_\_

Facility Name	City, State/Province, Country	Start Day & Date	End Day & Date	Event Tech Provider	Total Event Tech Expenditure (Event)	Total Event Tech Expenditure (Exhibitor & ICW)	List of Event Tech Equipment Attached?

### 5. EXHIBITION INFORMATION

Event includes and Exhibition? \_\_\_\_\_

Number of Exhibiting Companies \_\_\_\_\_

Exhibitor Kit Format(s) ☐ Online ☐ Print ☐ CD-ROM ☐ None ☐ Other

Exhibition Dates / Time

Day / Date	Exhibit Opening Time	Exhibit Closing Time

--	--	--

**Exhibitor Schedule**

Activity	Day / Date	Time
Move-In Start		
Move-In End		
Move-Out Start		
Move-Out End		

**Service Contractor Schedule**

Activity	Day / Date	Time
Move-In Start		
Move-In End		
Move-Out Start		
Move-Out End		

**General Service Contractor Selected?** \_\_\_\_\_**General Service Contractor  
Contact Information**

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**6. OTHER SPECIFIC REQUIREMENTS**

Describe any particular requirements for this event that have not previously been addressed (e.g., simultaneous interpretation/translation, audience response system, video conferencing, speaker ready room, webcasting, Content Management System, RFID two-way radios, cell phones, office equipment needs, etc.)

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**7. FUTURE DATES FOR THIS EVENT****Future Dates Open?** \_\_\_\_\_

Published Start Date	Published End Date	Notes

**8. RFP INFORMATION****RFP Issued Date** \_\_\_\_\_**RFP Decision Date** \_\_\_\_\_**RFP Decision Process**

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**RFP Special Requirements**

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**RFP Preferred Method of  
Communication**

Instructions on the preferred method of communication (email, etc) are entered in this field on the General Information sheet. It can also be edited on individual worksheets.



## APEX RFP Workbook

### Destination Management & Transportation Services RFP Section

Event Name

0

#### 1. CONTACT INFORMATION

##### Hosting Organization

0

Organization Name

0

Address

0

0

00000

City

State/Province

ZIP/Postal Code

0

Country

-

Telephone

-

Fax

0

Web address

##### Event Organizer (Third Party)

(if different from Host organization)

0

Organization Name

0

Address

0

0

00000

City

State/Province

ZIP/Postal Code

0

Country

-

Telephone

-

Fax

0

Web address

##### Key Contact

0

Name

0

Title

0

Address

0

0

00000

City

State/Province

ZIP/Postal Code

0

Country

0

email address

-

Telephone

-

Mobile

-

Fax

#### 2. EVENT PROFILE

Start Date

End Date

Location

Facility

Market Segment

0

Total Expected Attendance

0

Event Overview / Description 0

Event Goals / Objectives 0

Attendee Demographic Profile 0

Accessibility/Special Needs 0

### 3. DESTINATION MANAGEMENT SERVICES HISTORY

APEX Post Event Reports Available? \_\_\_\_\_

Facility Name	City, State/Province, Country	Start Day & Date	End Day & Date	DMC

### 4. DESTINATION MANAGEMENT SERVICE REQUIREMENTS

#### Event Proposal Overview

☐ Daytime/Evening Tours

☐ Shuttle

☐ Décor/Theme

☐ Staffing

☐ Dine-Around

☐ Team-Building Event

☐ Entertainment

☐ Transportation - Arrivals/Departures

☐ Golf

☐ Transportation - Special Event

☐ Guest Program

☐ Other:

☐ Meet & Greet

☐ On-Off Property Event

### 5. OTHER SPECIFIC REQUIREMENTS

Describe any particular requirements for this event that have not previously been addressed.

### 6. RFP INFORMATION

**RFP Issued Date** \_\_\_\_\_

**RFP Decision Date** \_\_\_\_\_

**RFP Decision Process**

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**RFP Submission Instructions**

Special instructions for this RFP are entered in this field on the General Information sheet. This field will give guidance on the number of copies of responses to submit (if hard copy), sales kits needed, etc in order to properly tender a proposal to provide services for the event. It can also be edited on individual worksheets.

**RFP Preferred Method of Communication**

Instructions on the preferred method of communication (email, etc) are entered in this field on the General Information sheet. It can also be edited on individual worksheets.

**APEX RFP Workbook**  
**General Service Contractor RFP Section**

Event Name

0

**1. CONTACT INFORMATION**

**Hosting Organization**

0

Organization Name

0

Address

0

0

00000

City

State/Province

ZIP/Postal Code

0

Country

-

Telephone

0

-

Fax

Web address

**Event Organizer (Third Party)**

(if different from Host organization)

0

Organization Name

0

Address

0

0

00000

City

State/Province

ZIP/Postal Code

0

Country

-

Telephone

0

-

Fax

Web address

**Key Contact**

0

Name

0

Title

0

Address

0

0

00000

City

State/Province

ZIP/Postal Code

0

Country

0

email address

-

Telephone

-

Mobile

-

Fax

**2. EVENT PROFILE**

Start Date



End Date \_\_\_\_\_

Location \_\_\_\_\_

Facility \_\_\_\_\_

Market Segment 0

Total Expected Attendance 0

Event Overview / Description 0

Event Goals / Objectives 0

Attendee Demographic Profile 0

Accessibility/Special Needs 0

### 3. EXHIBITION INFORMATION

Type of Exhibition \_\_\_\_\_

Type of Exhibits \_\_\_\_\_

Standard Booth Size \_\_\_\_\_

Gross Space Required \_\_\_\_\_

Unit of Measure \_\_\_\_\_

Net Space Required \_\_\_\_\_

Unit of Measure \_\_\_\_\_

Number of Exhibits \_\_\_\_\_

Number of Exhibiting Companies \_\_\_\_\_

Total Gross Weight of Exhibitor Freight \_\_\_\_\_

Unit of Measure \_\_\_\_\_

Exhibitor Kit Format(s) ☐ Online ☐ Print ☐ CD-ROM ☐ None ☐ Other

Exhibition Dates / Time

Day / Date	Exhibit Opening Time	Exhibit Closing Time

Hall Setup Schedule

Activity	Day / Date	Time
Hall Setup Start		
Hall Setup End		

Move-Out Start		
Move-Out End		

**Exhibitor Setup Schedule**

Activity	Day / Date	Time
Exhibitor Move-In Start		
Exhibitor Move-In End		
Exhibitor Move-Out Start		
Exhibitor Move-Out End		

**Items Included with Each Booth (Standard Booth Package)**

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**Special Considerations or Requirements**

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#### 4. EXHIBIT HISTORY

First-Time Event? \_\_\_\_\_

APEX Post Event Report Available? \_\_\_\_\_

Year	Facility and Location	Start Date	End Date	Attendance (Total)	GSF/GSM	Exhibitors (Total)	Gross Weight (Freight)

#### 5. FUTURE DATES

Future Dates Open? \_\_\_\_\_

Published Start Date	Published End Date	Notes

#### 6. RFP INFORMATION

RFP Issued Date \_\_\_\_\_

RFP Decision Date \_\_\_\_\_

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**RFP Submission Instructions** Special instructions for this RFP are entered in this field on the General Information sheet. This field will give guidance on the number of copies of responses to submit (if hard copy), sales kits needed, etc in order to properly tender a proposal to provide

**RFP Preferred Method of Communication** Instructions on the preferred method of communication (email, etc) are entered in this field on the General Information sheet. It can also be edited on individual worksheets.

## **APEX RFP Workbook**

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### Release Notes

v 1.2	5-July-2012	Improvements to cell use for future updates
v 1.1	27-March-2012	"General Service Contractor" change to preferred term, "Official Service Contractor"
v 1.0	27-July-2011	Initial release version.

actor". Minor typographical edits.