



COMMUNICATIONS BEST PRACTICE GUIDELINES FOR THE EXPOSITION INDUSTRY

2015

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IMPORTANT NOTICE

It is your responsibility to know and comply with the laws and regulations and any amendments thereto and to obtain appropriate legal advice to obtain that knowledge and comply with your legal obligations.

The guidelines suggested here are those of the Canadian Association of Exposition Management. They are offered for the purpose of general education and guidance only and should not be substituted for individualized legal advice and risk assessment. No liability can be accepted for any errors or omissions, or in respect of events or circumstances which may ensue from the following of these guidelines without reference to appropriate legal advice and risk assessment, and compliance with local legislative requirements.

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Introduction

In its 2012-2014 strategic plan, The Canadian Association of Exposition Management (CAEM) recognized the need to establish a series of best practice guidelines for the Canadian exposition industry, including communication best practices.

Effective communication is imperative at all stages of planning, from site selection to post event evaluation. Not only does it foster stronger relationships among stakeholders, it creates a foundation for success and ensures resources are expended efficiently and effectively.

In response to a members' needs assessment, CAEM established a Communications Best Practices Task Force with Show/Event Managers, Facility and Supplier representatives. The purpose of the task force was to work on the development of communication guidelines for the Canadian exposition industry. The task force retained the services of an industry aggregator, along with a writer, to collect insights and information from industry professionals and resources in order to develop the best practices in this handbook.

These guidelines are intended to assist Show/Event Managers, Facility representatives and Suppliers in negotiating and sharing information consistently and strategically in order to run successful, safe and profitable events. Recognizing each Facility and event is unique, these guidelines should be used as a starting point for conversations and negotiations; they address common issues and requirements, but do not cover every possible situation or scenario.

These guidelines have been approved by the CAEM Board of Directors and will be updated as required.

CAEM would like to thank all those involved for their considerable donation of time and for demonstrating leadership and commitment to the improvement of our industry.

How to Use These Best Practice Guidelines

Communication best practice guidelines have been included for site selection, operational communications, pre-conference meetings and emergency preparedness. These guidelines take into account the requirements of Show/Event Managers, Facilities, Suppliers and Exhibitors. They also outline the roles and responsibilities of Show/Event Managers and Facility representatives in communicating with various stakeholders.

Effective and strategic communication is critical to success for many reasons:

- It builds strong relationships and protects the reputations of all parties involved
- It ensures money and time are invested wisely and efficiently
- It mitigates the possibility of involved parties being blindsided by requirements or changes which haven't been explained or negotiated
- It minimizes the potential for unnecessary costs and delays

In an effort to make use of the excellent resources which already exist and to avoid conflicting or repetitive information, the handbook includes references to other industry resources for more information, when applicable.

We hope these guidelines are helpful as you move through the planning and implementation process. Ensure you understand what you are signing, ask questions, request changes as needed, and confirm everything you have agreed upon is in writing.

A note about terminology

There is terminology specific to our industry. We recommend users refer to the [APEX Glossary](#), a universally accepted resource for the meetings, conventions and exhibitions industry.

Best Practice Guidelines – Site Selection

INTRODUCTION

While every event is unique and requires a specific plan and critical path, there are some site selection practices which are common to every event and Facility. This module highlights those standards of practice and provides some guidelines for selecting an appropriate venue within the preferred city/province.

1. *Initial Selection Process*

Show/Event Manager:

- Meet with the organization, association, group and/or event planning team in advance of the site selection process.
- Determine which criteria are flexible and those which are essential. These will certainly include dates and budget, but may also take into consideration a vast number of other issues that are unique to the event.
- Create an [Event Profile](#).
- In some cases, you may need to prepare an RFP (see [APEX Accepted Practices Exchange](#))
- Go into the selection process understanding which available Facilities may meet the requirements of the event.
- Discuss size and scope of the event with the Facility and confirm the venue is appropriate.
- Acquire information from the Facility about any other events taking place at the same time.
- Inform the Facility of square footage requirements, special needs (accessibility requirements, food & beverage components of event, higher than normal security issues, seminar or special features, large features in the parking lot, etc.)
- Ask the Facility if they have held other events of a similar size, nature and scope and, if so, ask for references to help in the decision process.
- If considering a hotel, provide bedroom requirements and determine any attrition policies which may be levied.
- Inform hotel if reservations are to be made individually by the guest or a third party housing supplier/bureau.
- Discuss event features which require permits, such as tents and pyrotechnics.

Facility:

- Notify Show/Event Manager of any competitive events at the Facility.
- Provide up-to-date collateral materials, including floor plans, square footage and general information the Show/Event Manager can use to make an informed decision.
- Provide information about loading and material handling capabilities or restrictions.
- Be prepared to answer questions about how the Facility compares to others being considered.
- Notify the Show/Event Manager of any in-house unions, exclusive, official, or preferred contractors.
- If the Facility is a hotel, inquire about any bedroom requirements. Inform the Show/Event Manager whether the hotel has an attrition policy.
- Inquire whether hotel reservations will be made individually by the guest or a third party housing supplier/bureau.

2. Facility Suppliers and Services, Rental Rates, Additional Costs And Discounts

Show/Event Manager:

- Obtain information about hotels, transportation services, business services and other amenities from the Facility that may help in the decision-making process.
- Notify Facility of extraordinary requirements the event may have which would affect outside partners.
- If appropriate, provide detailed requests for housing requirements including room block and event catering expectations in advance.
- Request rental rates for move-in and move-out days. For example, some Facilities may offer a discount for the days used to set up and tear down the show.
- Ask for full disclosure of any elements relating to move-in and move-out days/hours, such as hall lighting, heating and concessions being reduced during move-in/move-out or before/after show hours during operation.
- Be transparent about the nature of the event. Notify the Facility if the event includes animals, musicians, hazardous goods, products that give off emissions, etc.
- Request a list of all additional services provided by the Facility and associated costs. These may include cleaning; electrical; audio visual; box office/gate; security; parking; marshaling; first aid; garbage removal; wireless services; and snow removal.

Facility:

- Clearly outline all available in-house services and related policies and prices.
- Notify the event of any on-site exclusive, official or preferred suppliers.
- Facilitate communication between visitors and convention bureaus, Chambers of Commerce and Departments of Tourism, as needed, to assist with the site selection process.
- Provide published price(s) for all space rental costs, including outside space.
- Provide rental rates for meeting rooms and show offices if not included in exhibit space rental.
- Provide a list of mandatory and optional additional services provided by the Facility that fall outside of the space rental costs. These may include cleaning; washroom attendants; electrical; audio visual; box office/gate; security; parking; marshaling; first aid; garbage removal; wireless services; key holder/security fees; dock marshaling and snow removal. List all additional costs associated with these services.
- Provide policies for food & beverage minimums and attrition.

3. Food & Beverage

Show/Event Manager:

- Ensure the Facility offers adequate services within budget to accommodate any receptions, dinners and breakfasts required by the event.
- Request Department of Health Regulations and contact information for food and beverage vendors.
- Notify the Facility if you are going to have refrigerated trucks on site.
- Ask if food services will be made available during all times of tenancy, including move-in and move-out times. If not, ask for a schedule outlining when snack bars or food concessions are open.
- Request menus, current pricing and references to compare with industry standards.
- Determine gratuities and applicable tax rates for all food and beverage services.
- Inquire about the Facility's policy regarding sampling and selling of food and beverages. Some Facilities prohibit this and others charge for the service. Some allow sampling and not selling and others will allow sales of take home product but not products which can be consumed at the show. This is particularly important if the event has a food component.

- Facilities may have exclusive contracts with suppliers or have their own department which provides food and beverage in the building. If the event includes exhibitors who will be selling food & beverage, inquire whether there is an option to buy out the food and beverage.

Facility:

- Notify Show/Event Manager of food & beverage capabilities, pricing and/or limitations.
- Provide Department of Health Regulations and contact information for food and beverage vendors.
- Inform Show/Event Manager of available cold/frozen food storage availability.
- Provide information about the Facility's food and beverage buyout policy.
- Provide any food & beverage policies in terms of exclusions, restrictions, attrition, licensing, etc.
- Provide policies relating to food & beverage handling as it relates to health and safety, such as length of time open food and beverages are permitted to remain on the show floor/event; quality control, etc.

4. Health And Safety And Code Requirements

Show/Event Manager:

- Request the Facility's published policy on health & safety as well as their emergency preparedness and crisis management processes.
- Confirm the prospective Facility is aware of and compliant with the
 - [CAEM Best Practice Guidelines for Health & Safety in the Exposition Industry in Canada](#)

Facility:

- Notify the Show/Event Manager of the Facility's existing health and safety policies.
- Notify the Show/Event Manager who has final approval of the floor plan. Ensure the floor plan reflects any restrictions which may affect design and booth sales.
- Confirm the Facility is compliant with the
 - [CAEM Best Practice Guidelines for Health & Safety in the Exposition Industry in Canada](#)

5. Infrastructure, Sustainability And Accessibility

Show/Event Manager:

- Ensure the loading areas meet the needs of the event.
- Determine whether there is adequate storage for contractors and shippers.
- Ensure lighting, heating and air conditioning, parking and public facilities meet the event requirements.
- Notify the Facility if the event has a specific green component or requirement to ensure standards are met.
- Inquire about any scheduled or possible renovations and/or construction on the property leading up to or during the event.
- Ask about road construction or other large special events in the area during the preferred dates of the event (e.g. marathons, charity walks, parades)

Facility:

- Provide measurements for loading doors, docks, ceiling heights, floor load capacities, elevators.
- Advise the Show/Event Manager of sustainability policies and restrictions.
- Provide information about the accessibility of the Facility in terms of ramps, washrooms, meeting rooms, elevators, entrances and egresses.
- Provide information about any scheduled or possible renovations and/or construction on the property leading up to or during the event.
- Notify Show/Event Manager of road construction or other large special events in the area during the preferred dates of the event (e.g. marathons, charity walks, parades).

Best Practice Guidelines – Operational Communications

INTRODUCTION

Effective communication can make or break the relationships between Facilities, Show/Event Managers and suppliers. Each has his or her methodologies and standards of practice and without effective communication, roles and responsibilities can become unclear and the quality of the event can suffer. These guidelines highlight best practices for efficient and clear communication among all stakeholders.

1. *Rental Rates and Contracts*

Show/Event Manager:

- Provide event information to the Facility as soon as possible and whenever changes are made. Note: see Event Profile for the type of information to provide.
- Include details, such as special features and outside groups or partners involved with the event.
- Request all terms and conditions, service schedules, rules, regulations and policies, restrictions, concessions, considerations and termination clauses in writing prior to signing.
- Determine the type of contract needed – one year or multi-year. If it is expected the show will be in the same location for successive years, a multi-year arrangement may be beneficial to both parties.
- When negotiating multi-year contracts, confirm the rates for each year of the contract.
- Determine whether the Facility has a competitive show policy and, if so, confirm the policy is suited to your needs. If a competitive show policy does not exist, negotiate a policy to protect against the Facility hosting a competitive show within a mutually agreed upon time frame.
- Request a menu of rates for ancillary services.
- If the show is well established and is expected to be in the same location in future years, confirm you will receive dates in your preferred date pattern every year.
- Negotiate specific timelines for the Facility to notify you of renovations, add-ons and room changes.
- Obtain proper liability coverage as specified in the Facility contract. If coverage is not required by the Facility, it is strongly suggested you obtain and provide proof of your own coverage.
- It is strongly encouraged you seek legal counsel to review the contract and all amendments prior to finalizing arrangements with the Facility and signing.
- Be sure you understand what you're signing; ask questions; request changes as needed and ensure everything you've agreed upon, including all service requirements, are in writing.

Facility:

- Provide a checklist or client service manual, including all terms and conditions, service schedules, rules, regulations and policies, restrictions, concessions, considerations and termination clauses to Show/Event Manager upon signing the contract.
- When considering requests for multi-year contracts and date holds, the Facility should consider whether the economic impact will meet or exceed the community's goals.
- Consider providing incentive pricing for multi-year contracts.
- Be fair and transparent when holding dates for shows, including notifying Show/Event Manager of requests for space or date patterns by competitive events.
- Work with the Show/Event Manager to negotiate a protection policy against competing events.
- Provide Show/Event Manager with reasonable notice of any room/space changes. Determine the length of the reasonable notice with the Show/Event Manager based on the needs of the particular Show/Event.
- If rental rates increase, it is recommended you provide at least one year's notice from the date of the show.
- Ensure the Show/Event Manager has obtained the required insurance coverage.
- Once the contract is signed, notify official and exclusive suppliers.

FACILITY SECONDARY SERVICES

The following are communication best practices for contracting additional services with the Facility or its exclusive, official or preferred suppliers. Some best practices apply to all secondary service negotiations and contracting. They are as follows:

- Show/Event Managers should confirm with the Facility whether any exclusive, official and preferred supplier arrangements exist for required services and determine whether any surcharges will apply.
- Prior to negotiating any secondary services, the Show/Event Manager should ensure the supplier provides proof of adequate liability insurance coverage.
- The Facility, Show/Event Manager and all suppliers should refer to the *CAEM Health and Safety Law and Risk Management Guidelines* and Show/Event Managers should be sure to select suppliers who are health and safety compliant. [Click here for Best Practices for Health and Safety Law and Risk Management Guidelines.](#)
- Show/Event Managers should share applicable information with exhibitors and ensure order forms are provided.
- Facility and Show/Event Managers should discuss any union contracts which are in place.

2. Accessibility for All

Show/Event Manager:

- Ensure your event is accessible to individuals with all levels of ability.
- Confirm you are compliant with provincial accessibility legislation and regulations.

Facility:

- Confirm accessibility requirements of the show.
- Confirm you are compliant with provincial legislation and regulations.

3. Audio Visual

Show/Event Manager:

- Request information from the Facility regarding audio visual guidelines and official/preferred suppliers.
- Review and confirm understanding of guidelines.
- Provide information about your supplier if you are not using the Facility's official supplier.
- Advise audio visual supplier of any changes to the audio visual plan as they arise.
- Confirm the Facility's deadline for final details.

Facility:

- If applicable, advise Show/Event Manager of any official/preferred suppliers of audio visual services and outline the benefits of using them.
- Provide the necessary guidelines if the Show/Event Manager has opted not to use your official supplier.
- Advise the Show/Event Manager of the deadline for final details to be received.

4. Coat Check

Show/Event Manager:

- Confirm coat check availability and requirements.
- Consider all of the variables related to coat check needs, such as season; demographics of the audience; minimum requirements; whether it is a cash or host coat check and any other special requirements.

Facility:

- Advise the Show/Event Manager of coat check details, including whether it is mandatory, there are designated or permanent areas, minimum requirements, etc.
- Provide coat check contact information to the Show/Event Manager.

5. Dock Management¹

Show/Event Manager:

- Confirm requirements with the Facility and agree on fees, roles and responsibilities, and services to be provided.
- Advise those responsible for dock management of scheduled move-in times. Note: Marshaling yards may be required for your event depending on the Facility.
- Refer to the [Canadian Association of Exposition Management Health and Safety Law and Risk Management Guidelines](#).

Facility:

- Explain dock management requirements and clarify whether this service is provided in-house or by an exclusive supplier.
- Confirm roles and responsibilities, fees, and services with the Show/Event Manager.
- Refer to the [Canadian Association Exposition Management Health and Safety Law and Risk Management Guidelines](#).

6. Electrical/Mechanical

Show/Event Manager:

- Advise the Facility of electrical and mechanical needs, including any special requirements. As part of due diligence, the Show/Event Manager will distribute forms to exhibitors that outline requirements based on applicable standards.
- Ask the Facility or Supplier about convenience electrical outlets, where no electrical charge will be levied, available in meeting rooms and lobbies.
- Ensure there are qualified personnel on site during move-in and throughout the show.
- Inquire with Suppliers about tiered pricing for early bird orders.

Facility:

- Identify technical staff and services available through the Facility.
- Advise the Show/Event Manager of exclusive suppliers, if applicable.
- If there are no exclusive suppliers, refer the Show/Event Manager to official suppliers.
- Provide contact information and rates for electrical services.

¹ This service is unique to each facility.

7. First Aid

Show/Event Manager:

- Inquire about on-site services, facilities and equipment for first aid.
- If the Facility does not provide these services, ask for the names of recommended suppliers.
- Ensure service hours include move-in and out, as well as regular show hours.
- Confirm the Facility's first aid chain of command.

Facility:

- Outline the Facility's first aid chain of command and any other first aid requirements the Show/Event Manager must meet.
- Provide information about on-site services, facilities and equipment for first aid.
- If services are not offered by the Facility, provide a list of suppliers.

8. Food & Beverage

Show/Event Manager:

- Discuss Facility requirements with respect to food and beverage space.
- Discuss and agree upon food and beverage requirements, including VIP dinners, opening breakfasts, receptions and dinners, and location of space.
- Determine the type of food you would like at your show and, if not provided by the Facility, work with the Facility to identify possible outside suppliers who could meet your needs.
- Determine whether there are any restrictions on outside providers.
- Confirm whether there are food and beverage sales minimums.
- Inquire about the foodservice schedule, including move-in and out times.
- Advise the Facility of any special food requirements, including preparation stipulations, as early as possible.
- Confirm parameters pertaining to samples and selling of food or beverages, including size and required licenses and permits; and inform exhibitors.
- Ensure you are aware of what your exhibitors are doing and inform the Facility.
- If food and beverage minimums must be met, request receipts on a daily basis.
- Inquire about food standards and restrictions.
- Be sure you understand the rules pertaining to alcohol and confirm the areas to be licensed.
- If the show has a significant food component, inquire about a food and beverage buyout.
- Determine the risk management protocol regarding any health and safety issues related to food and beverage services.

Facility:

- Provide floor plan options and discuss seating standards with the Show/Event Manager.
- Ensure enough room has been allocated and standards are met.
- Advise the Show/Event Manager whether food and beverage minimums apply and whether they are subject to attrition policies if minimums are not met.
- Provide parameters for sampling and selling food on site, including information about required licenses, permits, etc.
- Share information about food standards, such as the length of time food can sit out, and any food and beverage restrictions.
- Outline food and beverage buyout details for events with a heavy emphasis on food.

- Ensure foodservice is available throughout the event, including move-in and out times.
- Let the Show/Event Manager know of preferred suppliers for any menu items the official supplier cannot provide.
- Ensure a risk management plan is in place for any health and safety issues related to food and beverage services.

9. Housekeeping/Cleaning

Show/Event Manager:

- Determine whether housekeeping is provided in-house or by an exclusive or official supplier. Also confirm applicable fees.
- Inquire about cleaning services and applicable fees based on the nature of your event.
- Find out about the Facility's sustainability program, including rules and policies pertaining to issues such as damage; tape, shoe polish or chalk left on the floor; and waste disposal; and clarify applicable fees. Communicate requirements to staff and exhibitors (Also see Sustainability).
- Confirm the location of recycling areas.

Facility:

- Advise Show/Event Manager whether housekeeping is provided in-house or an exclusive supplier is used.
- Outline additional fees charged for damage, waste disposal and tape removal, etc.
- Provide information about the Facility's sustainability program and any requirements the Show/Event Manager and Exhibitors must meet (Also see Sustainability).

10. Parking

Show/Event Manager:

- Parking varies in each Facility; some provide parking, others do not, and some use a third party. Be sure to confirm which of these applies.
- Provide information about parking needs, including any special requirements.
- Enquire whether other events are running at the same time as yours. Confirm whether parking is available and obtain necessary details regarding capacity, services provided, restrictions, fees, etc.
- If you are sharing the Facility with another event, inquire about the Facility's policy and request details and cost sharing options.

Facility:

- Gather information about parking requirements and outline applicable services and costs.
- Advise Show/Event Manager of any special requirements they need to meet, such as police assistance for high-traffic events.
- Provide shared parking policy, details and cost sharing options.
- Notify Show/Event Managers of concurrent events and ensure adequate parking is available.

11. Public Address Systems

Show/Event Manager:

- Clarify whether use of the public address system is included in the contract.
- Confirm the range of the public address system and ask for operating instructions.
- Outline any special public address system requirements.

Facility:

- Confirm whether the public address system is included. If not, inform the Show/Event Manager of outside supplier options.
- Clarify special requirements and restrictions.
- Arrange for a qualified staff member to train the Show/Event Manager on how to use system.

12. Rigging

Show/Event Manager:

- Inquire about the Facility's maximum weight/load capacity.
- Provide your production schedule to the Facility or designated supplier.

Facility:

- Provide information about approved rigging companies and confirm who should receive approvals.
- Clarify show requirements.
- Obtain weight/load plans and a production schedule from the Show/Event Manager.

13. Security

Show/Event Manager:

- Confirm whether the Facility provides security service in-house or uses an exclusive or official supplier.
- Invest in a full-service, licensed security firm, providing services such as fire safety, bomb threats, evacuation, lost children, etc.
- If not using their exclusive supplier, obtain approval for your selected security company from the Facility.
- Submit a security schedule, including any VIPs and special dignitaries who will be in attendance, for approval to the Facility.
- Be sure to review the emergency response plan thoroughly and confirm understanding.

Facility:

- Provide information about in-house services or exclusive supplier arrangements or alternatively supply a list of approved event security companies.
- Verify the show security company is licensed prior to providing approval.
- Provide a copy of the emergency response plan to the Show/Event Manager and confirm their understanding of the plan, preferably in writing.

14. Staging

Show/Event Manager:

- Advise the Facility of staging requirements for your event.
- Determine which services, if any, are provided by the Facility and confirm associated costs.

Facility:

- Advise the Show/Event Manager of available staging services and any restrictions that apply.
- If you do not offer these services, provide names of exclusive or official suppliers who can meet the needs of the Show/Event Manager.

15. Sustainability

Show/Event Manager:

1. Ask for the Facility's policy and location of in-house waste management and recycling programs.
2. If the Facility adheres to Leadership in Energy and Environmental Design (LEED) practices, ask whether in-house resources are available to support the sustainability of your event.
3. Notify the Facility of your sustainability practices.

Facility:

- Provide the Show/Event Manager with the Facility's position on building sustainability.
- Notify Show/Event Manager of on-site sustainability efforts and encourage them to pass this information along to exhibitors and visitors.
- Notify Show/Event Manager of any ancillary charges related to recycling and/or waste management.

16. Telecommunications

Show/Event Manager:

- Confirm available telecommunication services, such as phone and fax lines, Internet services, walkie talkies, etc.
- Investigate options, including WiFi areas and hotspots and clarify any charges that apply.
- Provide details about required services.

Facility:

- Advise the Event/Show Manager whether telecommunication services are provided in-house or through an exclusive or official supplier.
- Provide details about available services and fees.

Best Practice Guidelines – Pre-Conference Meetings

INTRODUCTION

The pre-conference meeting is an opportunity for the Show/Event Manager, the Facility and key suppliers to meet face-to-face to review all important details and special requirements.

It is usual practice for the Show/Event Manager to run the meeting, however, in some cases, the meeting may be run by the Facility. In either case, it is important to have an agenda, agreed upon objectives, and a timeframe for the meeting.

The pre-conference meeting is usually held at the event Facility and should be held as close to the show as possible (i.e. a week before the first move-in day). Prior to the actual meeting, the Facility and Show/Event Manager will be in frequent contact regarding logistical and operational details. These items will be included in the event specification guide², prepared by the Facility.

The Show/Event Manager is responsible for ensuring all parties involved in producing the event are informed of any details and/or requirements which affect them. In some cases, the Show/Event Manager will hold separate meetings with key suppliers (i.e. audio/visual, official service contractor) to review information specific to their services.

These guidelines have been written to assist stakeholders in organizing and executing an effective and efficient pre-conference (pre-con) meeting.

1. Roles and responsibilities prior to the meeting

Show/Event Manager:

- Work with the Facility to prepare an agenda and list of participants.
- Review deadlines provided by the Facility and negotiate any extensions.
- Provide necessary details such as special needs and requirements to the Facility, in accordance with their timelines, in advance of the pre-conference meeting. Keep the Facility and key suppliers updated about any changes.
- Send the following in advance or bring to the pre-con meeting
 - Event program
 - Floor plans
 - Contact numbers – office, onsite and emergency contact information for all suppliers and event team

² Note: all facilities use different names. This is a comprehensive document that outlines specific details about the event.

Facility

- Several months before the event, supply the Show/Event Manager with a schedule of important deadlines.
- Work with the Show/Event Manager to prepare the agenda and a list of participants
- Send the following to the Show/Event Manager in advance or bring to the pre-con meeting
 - Emergency response plan
 - Event specification guide
 - Banquet event order
 - Contact information – office, onsite and emergency contact information for all Facility personnel and exclusive contractors
 - Parking passes
 - Room keys (as appropriate)

All (Show/Event Manager, Facility and suppliers):

- Agree upon deadlines that work for all parties and make every effort to adhere to the timelines.
- If modifications are necessary along the way, notify the other party as soon as possible.
- Agree upon what information will be sent in advance and what will be shared at the meeting.
- Both the Facility and Show/Event Manager should come to the pre-con meeting with up-to-date information from contributing parties.

2. Roles and responsibilities at the meeting

Show/Event Manager:

- Ask team members to introduce themselves and their roles.
- Clarify who has signing authority and authority to make changes at the event. It is recommended this be restricted to a few individuals as this will allow for clear and efficient decision-making.
- Provide a brief overview of the organization history and objectives of the event.
- Review the event specification guide, in particular any special requirements of the group, individuals or VIPs.
- Discuss your personalized emergency preparedness/response plan.
- Identify potential hazards (i.e. controversial guests, sessions which may require special attention or security).
- Discuss and confirm:
 - Food and beverage numbers
 - Room sets and change overs
 - A/V requirements
 - Special passes/keys
 - Process for post-conference evaluation

Facility:

- Ask team members to introduce themselves and their roles.
- Review the event specification guide, in particular any changes or special requirements of the group, individuals or VIPs.
- Discuss emergency preparedness/response plan.
- Appropriate Facility team members should stay to discuss and confirm:
 - Food and beverage numbers
 - Room sets and change overs
 - Audio visual requirements
 - Special passes/keys
 - Process for post-conference evaluation

All (Show/Event Manager, Facility and suppliers):

- Ensure all pertinent details and outstanding work have been discussed and clarified.
- All meeting participants should read the [Emergency Preparedness](#) section of this handbook.
- All parties should understand one another's emergency response requirements, expectations and health and safety policies and procedures.
- Banquet event orders and the event specification guide should be signed or modified as necessary.
- Once signed, share the event specification guide with the appropriate Facility staff members.
- Confirm any additional meetings participants are required to attend, including on-site and post-show meetings.
- Pre and post-event inspections should be completed to identify potential issues and avoid unnecessary charges. Pre-show inspections should be done when your Facility contract begins and post-inspection should be completed when the last piece of freight is off the floor and the exhibit hall is clear.

Best Practice Guidelines – Emergency Preparedness and Crisis Management

INTRODUCTION

A crisis is a major occurrence with a potentially negative outcome, affecting the event, its stakeholders or its brand. A crisis interrupts normal business transactions and requires immediate action.

It is important, in any crisis, to have a plan in place. When disaster strikes, it is critical everyone on your team understands their role and responsibilities and knows how to respond. An effective plan can help you mitigate risk; protect the health and safety of staff, participants, and community members; and minimize damage to the Facility and the surrounding community.

The following guidelines outline key steps to be taken in developing a plan, and preparing the team and the site appropriately so the plan can be quickly and effectively activated when needed.

A note about this section of the guidelines

The development of an emergency plan should be a collaborative effort. As such, we have taken a slightly different approach with this section of the handbook and have not delineated the roles and responsibilities of the Show/Event Manager and Facility.

1. Work collaboratively to develop a comprehensive plan

- The Show/Event Manager and the Facility should work in collaboration with a security consulting firm to develop a comprehensive emergency preparedness/crisis management plan. You will likely have your own plans in place; so much of the work may already be complete. However, it's important to review and address any discrepancies and gaps.

The event emergency preparedness/crisis management plan should be simple and easy-to-follow and should include:

- A list of potential crises, listed in order of probability and impact (see item #3 in these guidelines)
- The names and contact information for all crisis team members, including roles and responsibilities
- A list of all emergency response contacts in the area of the event
- A list of all stakeholders and possible communication channels to reach them
- Protocols for each of the potential crises identified
- Identification of a crisis management office which will serve as a hub for all response activities, as well as an alternate in case the first location is compromised
- A full list of equipment required for the office (e.g. telephones, two-way radios, battery-operated AM/FM radio, copy of the plan, floor plans of show, maps of facility, notebooks, a flashlight, megaphone, additional batteries, etc.)
- Key messages and pre-approved statements for each possible scenario and stakeholders who should be notified in order of priority
- Recovery protocols – outlining how you will return to normal operations
- A list of internal and external reports needed subsequent to the incident

2. Identify the crisis team and roles and responsibilities

- Identify the Crisis Response Captain – the person who will ultimately be responsible for the execution of the plan. This could be the Show/Event Manager, or a senior organizational leader, such as an Executive Director or CEO.
- The team will take direction from the Crisis Response Captain.
- The secondary response team will include representatives from the Show/Event Management team, the Facility, and the security company. They are responsible for carrying out emergency response, coordinating activities and managing communications specific to their areas of responsibility.
- Roles and responsibilities should be determined with the assistance of the security personnel.
- At least one team member should be located offsite with a copy of the plan.
- Ideally, the full team should review the plan at least once before the event and more if the nature of the event calls for it. However, if this is not possible, the team should meet onsite the day before the event to review crisis/emergency protocols and roles and responsibilities.

3. Conduct threat and vulnerability analyses

- Identify likely occurrences for your event. Possible crises include:
 - Threats of terrorism
 - Medical
 - Fire
 - Electrical
 - Gas Leak
 - Flood
 - Unruly visitors
 - Labour dispute
 - Lost or distressed person(s)
 - Natural disaster or weather-related incidents
 - IT system breach
 - Malicious acts
- It is recommended you assign a numeric code to the potential crises identified for your event. This will allow the team to minimize panic and communicate discreetly in instances where others may overhear the conversation or when the use of the public address system is necessary.

4. Establish communication/media protocols

- Identify a spokesperson.
- Determine where media interviews and news conferences will occur, as well as an alternate location in the event the first is compromised.
- Be sure the media spokesperson has all the information needed to communicate quickly and accurately.
- Have prepared and approved statements prepared in advance to avoid having to write and seek approval during the crisis.

We would like to extend a special thank you to John Le Roy of J.C. Le Roy Security Consulting Ltd for his assistance with this section of the handbook. John is a founding member of CAEM and has extensive experience consulting with Show/Event Managers and Facilities across Canada on the topic of emergency preparedness and crisis management. John can be reached at johnleroy.consulting@gmail.com.

Resource Links

- [APEX Accepted Practices Exchange](#)
- [APEX Event Specifications Guide](#)
- [APEX Meeting and Site Profiles](#)
- [APEX RFP Workbook and RFP templates](#)
- [CEM Certification](#)
- [The Art of Show](#)
- [Professional Convention Management Association](#)

Event Profile

The event profile helps Facilities understand the purpose and requirements of your event. The following checklist is based on information *typically* provided and has been compiled using multiple samples, including the [APEX Event Specifications Guide](#). Note: requirements may vary depending on the needs of the Facility and the event.

Organization/principal owner information

- Name and title of principal owner or Show/Event Manager
- Overview of organization, including your core business, vision, mission and values
- Contact information with full address, email, website, primary phone and cell numbers

References – Facilities and other individuals who have had experience working with you on previous events

- Name of Organization/Facility
- Contact information
- Event name

Event Details

- Name of event
- Type of event (Trade show only, conference and trade show, consumer or public show, special event)
- Description of event (approximately 100 – 150 words)
- Frequency of event
- Target audience
- Attendee information for each day, including arrival and departure times. For example is the event open to the public, for trade only, or invitation only?
- Type and number of exhibitors and booth staff
- Information about catering requirements
- Promotional activities
- Name of general contractor

Date and Space Requirements

- Preferred dates or date range if flexible
- Gross square footage
- Information about event schedule/key timelines, such as floor marking and move in and out for exhibitors
- Number and size of booths to be sold
- Storage needs
- Information about the intended use and size of feature areas
- Meeting room requirements, including expected attendance for meetings and room set up
- Office space or other room requirements
- Accessibility requirements
- Audio and visual requirements