Morgan Stanley

Production Brief

National AIU Western

Morgan Stanley is hosting a two day in-person event featuring a General Session and Manager Forum small group meetings

Event Days	Tuesday, October 24 – Wednesday, October 25, 2023
Expected Attendance	400 attendees
Venue	JW Marriott Los Angeles LIVE
	900 W. Olympic Boulevard, Los Angeles CA

As of 8/15/23

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Contact Information

Morgan Stanley Team

Producer(s)	Michael Garden Michael.Garden@morganstanley.com phone 212-762-1182 mobile 646 241-6738	Danielle Rosen Shapiro Danielle.rosen.shapiro@ms.com phone 212-761-4212 mobile 203-246-0422	
Meeting Planner(s)	Matt Egan		

Venue Details

Venue	JW Marriott Los Angeles LIVE 900 W. Olympic Boulevard, Los Angeles CA
Venue Contact, CSM	
In-House A/V, Power, Rigging & Internet	Encore

Production Vendors

Production Company	Encore
Froduction company	
	SmartSource
Computer / IT Equipment	Ken Edwards
Computer / IT Equipment	M: 917-952-9085
	kedwards@thesmartsourcecom
	Olson Visual
Scenic	Kelly Olson
Scenic	M: 310-527-1094
	Kelly.olson@olsonvisual.net
	Freeman
Manager Forum Booths	Jason Gupta

Scope of Services – Production Company

The Production Company must include the following in their proposal:

- 1. Overall management:
 - a. Responsibility for all creative and technical elements for the entire project, including all breakouts, on property receptions, power, rigging, etc. even if in house A/V is utilized.
- 2. Dedicated Project Manager / Technical Producer:
 - a. To be the single point of contact for Morgan Stanley's producers, planners, and client for the duration of our pre-production and production process. We expect the Project Manager / Technical Producer to be available for all calls, site visits, and onsite for all load in and events. They should be considered the conduit for all information between the Production Company and Morgan Stanley and to remain consistent from 10 weeks prior to the first event through the closing of the final budget.
- 3. In Person Meetings and Site Visits for Project Manager / Technical Producer:
 - a. Site visits to all venues should be accounted for in your proposal.
 - i. The project manager / Technical Producer is expected to be onsite for 1 site visit per venue. Allow for 1 travel day and 1 site visit day each.
 - ii. Morgan Stanley will pay for hotel and travel. All other expenses should be accounted for in your budget.
- 4. Supply and update drawings
 - a. to include seating layouts to aid the overall production including but not limited to General Session, all breakouts, registration, expo, receptions, and offices
 - b. If there is a specific number of updates or time allotted for drawing and updates this must be included in your budget response. Additional drawing time will not be compensated without an approved change order submitted prior to incurring any additional charges.
 - c. Drawings should be accurate and to scale.
- 5. Coordination of all mandatory regulations, venue requirements and deadlines including but not limited to fire and union.
 - a. Involve all required parties in document distribution and achieve signoff.
- 6. Reference Morgan Stanley production documentation and provide equipment that meets or exceeds minimum specifications.
- 7. Responsibility for all labor relations and coordination
 - a. Supply and coordinate all onsite production staff
 - b. Key positions consistent throughout series
 - c. Utilize union labor as needed and budget accordingly. Avoid labor duplication and shadow labor whenever possible. In Union and non-Union locations, if the in-house team can be utilized as cost avoidance please propose this solution even if it means utilizing in house equipment.
 - d. Schedule and provide adequate meal breaks to ensure regulations are met
 - e. This includes the crew arranged by the Production Company as well as scheduling and monitoring of crew and hours to ensure compliance with local union and facility regulations.
- 8. Document Creation and Management
 - a. Produce a detailed production schedule for the entire event, which will be updated periodically and customized to each venue

- b. Create and maintain rehearsal schedule
- c. Produce and manage the showflow, and update promptly as needed for the inevitable changes to running order and speakers onsite
- 9. Manage content both prior to site and onsite as needed.
- 10. Project Manager / Technical Producer to participate in 2 weekly calls with Morgan Stanley from 10 weeks prior to the first event through the final budget and invoice submission.
- 11. Provide all insurance certifications to Morgan Stanley and venue.
- 12. All necessary cabling and accessories must be included at this time. Be aware of cable paths when planning and avoid crossing doorways
- 13. Coordinate directly with the venue directly on behalf of Morgan Stanley
 - a. Your proposal must abide by the Technical Resource Manual provided by in-house A/V at each venue
 - b. The charge for their technical supervisor (if required) must be built into the event budget.
 - c. Power, rigging, and IT as well as Union Costs may be exclusive through in-house A/V Vendor and/or hotel.
 - i. IT, Rigging, and Power costs should be excluded from your response. Instead, please submit the amount of IT, Rigging, and Power you require and Morgan Stanley will get the pricing from the venue. Any in House A/V costs will be billed to the Morgan Stanley Hotel Master invoice.
- 14. Project and Scope Changes
 - a. Any expenses anticipated past the initial approved budget must be submitted for written approval ahead of time via email or updated budget.
 - b. An updated budget must be resent to Morgan Stanley producer once Change is approved.
 - c. Change orders will be approved for project or scope changes only. They will not be approved for errors or omissions on the part of the Production Company.
- 15. All budgets should include all applicable taxes, fees and service charges.
- 16. As with all other Morgan Stanley proposals, you must provide an offer you would be prepared to repeat in the future. Special "one-off" pricing will be disregarded, as it is not in the long-term interest of our clients or our future relationship.
- 17. Please exclude crew accommodation and flights but include quantity in your submission.
- 18. All Morgan Stanley purchased items, including but not limited to all branded prints and backdrops as well as stage furniture, are to be disposed of after the event unless storage is discussed. Include this cost in your pricing.

Per your contract, we require a gear list and full transparency so we can assess the technical merits of your proposals.

Scope of Services – Venue IT Vendor

The IT Vendor should take into account the following in their proposal:

- 1. All hardwired Internet lines must be direct open connections to the outside world. We can provide MAC address for our routers if required to ensure our connections are open.
- 2. We prefer dedicated bandwidth per port to maintain critical parts of our network in the offices please indicate what options are available to us.

Scope of Services – IT Vendor

The IT Vendor should take into account the following in their proposal:

- 1. Overall management:
 - a. Responsibility for all office and IT for the entire project
 - b. Include a dedicated IT Technician consistent throughout entire series.

We require a gear list and full transparency so we can assess the technical merits of your proposals.

Dress Code

Please wear casual attire for set up days. When setting up or dismantling at our events, we would like crew to wear the approved attire of the company that employs them. Regardless of the vendor Health and Safety rules, we would expect anyone in a setup or dismantling role to be wearing protective footwear as an absolute minimum.

Business attire is appropriate for all 4 meeting days. Variations to this are permitted on certain jobs, especially if your attire would compromise your safety.

- Dress pants or skirts / dresses
- Jackets or sweaters required when working with attendees
- Should you choose to not wear a jacket or sweater due to the heat please wear long sleeve dress shirts in a jackets absence.

Axioms

Sustainable and Repeatable

All items proposed in a budget should be considered repeatable in perpetuity. There should be no special offers or one-off pricing to win a project.

Communications

Problems can occur throughout pre-production, load-in, on-site, and load-out. It is imperative that the Morgan Stanley event producer is informed immediately of any situation so they can be involved in the decision-making process and remediation timelines. Any attempt to resolve problems without informing the producer will damage the spirit of the relationship.

Accuracy

Whatever is requested in a brief must be provided on the bid response. If certain items are not available or there are substitutions, it must be clearly communicated during the proposal process. Similarly, if changes from an agreed scope develop in the course of pre-production, they must be clearly communicated. Do not assume that providing higher quality or better specification equipment is acceptable. A sudden increase in quality may not be repeatable in a future year.

Professional

All communication is audited by the firm and governmental agencies. Communication can be friendly and casual, but it always must be professional. Avoid sloppily written mobile emails. On site, staff should be briefed to pay particular attention to attendee's questions. We never know when an executive may approach a crew member and we request the team be prepared to professionally point them in the right direction or solicit help from a production lead.

Presentable

All staff, including crew members and contractors, must be presented in a professional manner. This includes having clean attire and uniformity across the team, everyone should look like a clean and cohesive team. The key leads should be in a sports coat/blazer (or female equivalent)—ties are not required.

Secure

As a financial institution, security is absolutely a critical part of our business. Significant care is paid in regard to ensuring all communication is handled in a secure manner. Protocols are in place for file sharing and must be followed.

Draft Agenda (as of 8/15/23)

Day 1

- 2pm Registration Open
- 5pm -7pm Welcome Reception

Day 2

- 8am General Session
- 4pm Event Ends, Departures

Meeting Space

USE	FUNCTION SPACE
General Session	Platinum A-D
Manager Forum	Gold Ballroom
Meals, Attendees	Platinum E-J
Pop-Up Office	Atrium I
Marketing Storage	Atrium II
MS Staff Office	Atrium III
AV Storage	Studio IV
Reception	West Road 1 (Weather Back up: Platinum E-J)
Registration	ТВД

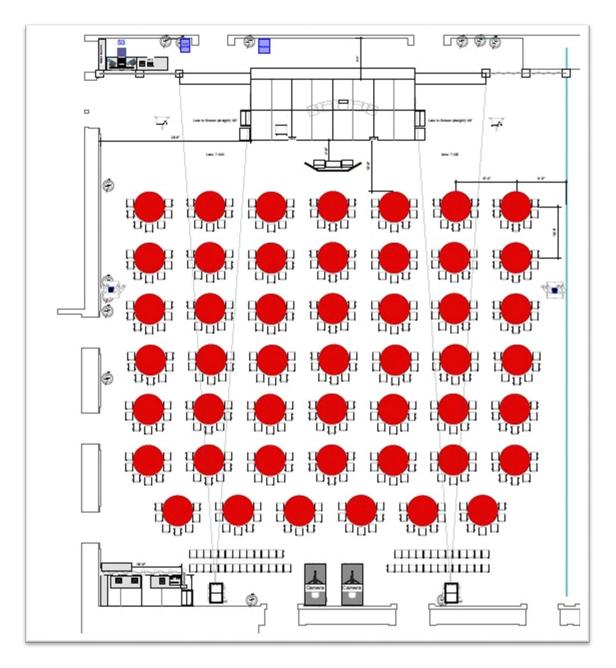
Estimated Production Schedule

Event Day 2		Overnight Security Ende		
DAY	TIME	ACTION	VENDOR	LOCATION
	7:00pm	Reception Ends Overnight Security Begins		
	5:00pm	Reception Begins		West Road I
	4:00pm	Q2Q with Stakeholders	Encore	Platinum A-D
	TBD	Access to Reception to begin set up	Encore	West Road I
	2:00pm	Registration Opens		
	1:00pm	Manager Forum AV Set	Encore	Gold Ballroom
Set-up Day 2 / Event Day 1 10/24/23	8:00am	General Session Load In	Encore	Platinum A-D
	6:00pm	Manager Forum Set by EOD	Freeman	Gold Ballroom
	5:00pm	Access to General Session	All	Platinum A-D
	10:00am	Offices Set	SmartSource	
	8:00am	Manager Forum Load In	Freeman	Gold Ballroom
	TBD	Registration Load In	Olson	
	8:00am	Office and Registration Load In	SmartSource	Atrium I-III
Set-up Day 1 – 10/23/23	By 8:00am	Hardline Internet Drops in Place	Encore	AI
DAY	TIME	ACTION	VENDOR	LOCATION

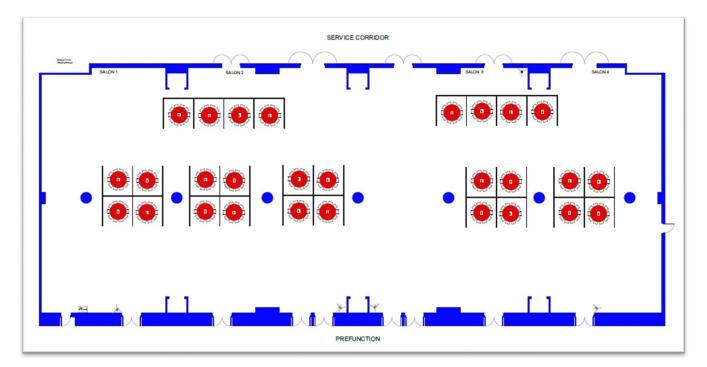
DAT		Action	TENDOR	LOGATION
Event Day 2 – 10/25/23	6:30am	Overnight Security Ends Crew Call	All	All
	7:00am	Rehearsals (if needed)	Encore	Platinum A-D
	7:30am	General Session Doors		Platinum A-D
	11:00am	Access to Atrium III and Studio IV Ends	SmartSource	Atrium III and Studio IV
	2:00pm	Access to Platinum E-J Ends		Platinum E-J
	4:00pm	Load Out Begins. Non-Exclusivity Begins	All	All
	6:00pm	Access to Atrium I & II Ends	SmartSource	
	8:00pm	Load out complete for GS & MF	All	All

Room Drawings

General Session



Manager Forum



Requirements by Area

General Session

Platinum A-D	General Session Access at 10/23/23 at 5pm Set by 10/24/23 by 5pm Strike at 10/25/23 at 8pm	Vendor
General Setup (Seating)	44 72" tables (crescents of 8) = 352 seats 48 theater seats at the back Total of 400 seats	Hotel Banquet
House Risers	Stage 32' x 14' x 24" with standard hotel skirting Step units with handrails	Hotel Banquet
Staging	Lightbox Backdrop (32' L x 14' H) with Front Projection Surfaces (14' L x 14' H). Backdrop to be set behind the stage	Olson
Furniture	5 x Chairs 4 x Side Tables	Encore
	House lectern with a printed sign (supplied by MS)	House Banquet
Video	 2 Camera Package (HD) 1 Operator with Camera 1 Robo Cam (primarily locked off shot) 2 Screen Projection System with Hot Backup The vendor can select a switching system of their choice but the comfort monitors must be independently switchable to only show PPT sources. Projector positions and hardware should be chosen with care to minimize the operational noise of the equipment to the delegates. Rear projection would be preferable if possible within your layout 1 x Confidence monitors with surround I x Confidence monitors with surround Perfect Cue System Light Playback The system we require should be capable of switching and routing the following minimum sources: Inputs to data switcher 2 x Show PPT computer inputs (main and backup from Smartsource) Video Camera System 	Encore

	Feeds to Screen(s)	
Audio	 Feeds to 1 x down stage comfort monitor The vendor should choose an audio system that is appropriate for the room and audience size. The system must produce an accurate reenforcement of music, audio from video and intelligible speech in all areas of the room. Proper coverage of the entire room NOT just the audience seating area. Proper coverage must be modeled via a 3D modeling software in advance and a pdf of that model may be shared with Morgan Stanley. Consistency of brand/product within the room is preferred. The audio system should include the following: Digital Console with a primary and backup power supply and one UPS The digital console must be equipped with 16 channels of either an on-board or external automatic gain sharing mixer and can be inserted on channels post-fade. Onstage fold-back monitors Crew comms (frequency agile wireless and wired) Microphone package including wireless and wired microphones. Wireless kits should be frequency agile: 12 Wireless combo kits (capable of Lav or HH) Cross check needs against agenda All lavaliere mics must be matching cardiod or hyper-cardiod elements 2 wired Cardioid or super-cardioid lectern mics 1 wired VOG mic with a switch or push to talk box 	Encore
	 1 wired backup HH microphone. The engineer (A1) should have the ability to record, edit and playback voice overs. Play background Music, walkups/ playons/ stingers. Create an overall frequency co-ordination both in advance and onsite with venue and other vendors. This would include breakouts and other nearby rooms using wireless microphones. Power, signal distribution, adequate battery supply and appropriate rigging for a complete system. Ability to playback via Q Lab 	
Lighting	 The vendor should supply a lighting design to complement the stage design and to provide appropriate illumination for the stage and backdrop. The equipment should be carefully chosen to minimize rigging hardware and operational noise. There should be an evenly balanced wash on the stage which is controllable to highlight various stage areas. Various lighting looks should be able to be stored in presets and recalled for consistency. Proper color correction and lighting for IMAG and record purposes. 	Encore
Crew	The vendor should supply all staff to manage and operate the event, which should include but is not limited to: Project Manger / Show Caller Master Electrician capable of LD Video Engineer / Switcher	Encore

	 Audio Engineer Audio Assistant/A2 capable of A1 (1) Camera Operator The quote for labor should include a complete breakdown that includes all provisions for overtime. Please provide a quantity of flights and room nights for your crew so we can calculate the total cost of production. Please provide a per diem for each member of your crew to be self-sufficient for catering. Please distinguish local crew that would not require flights or hotel accommodation from travel crew.	
Power	As Needed	Encore
ІТ	2 x show build laptops	SSR

Manager Forum

Gold Ballroom	Manager Forum Access by 10/23/23 - 8am Set by 10/24/23 – 1pm Strike at 10/25/23 – 8pm	Vendor
General Setup	Up to 28 Booths Max 10' x 10' 3-sided hard wall booths.	Freeman
	Provided signage to be attached	
Furniture	28 x 60" Rounds 10 chairs per table	Hotel Banquet
ІТ	1 x Digital Monitor (see digital signage section)	SSR
AV	Speakers and laptop for playback of prerecorded announcements	Encore
Power	Wall Power	Encore
Cvent	28 x Scanners	CVent

Registration

TBD	Registration Area Access by 10/23/23 – 8am	Vendor
Scenic	2 x Desks 2 x Printer Boxes 1 x Printed Backdrop (16 w x 10 h)	Olson
Furniture	1 x 6' Table	House Banquet
	4 x Bar Stools	TBD
IT	1 x Nighthawk Router 1 x Switcher 1 x BW Printer (HP M605N), networked wired and wirelessly to laptop 2 x Laptops 2 x power strips	SSR
Internet	2 x dedicated DHCP internet drop • Cvent • MS Reg	Encore
Power	Wall Power	Encore
OnArrival	2 x iPad 2 x Printers	CVent

Reception

West Road I (Back-up: Platinum E-J)	Tuesday Cocktail Party Access at 10/24/23 – XXX Strike by 10/24/23 – 7pm	Vendor
Audio	Small Speaker Setup for Music	Encore
Lighting	TBD – Safety Lighting and Lighting of Bars & Buffets	Encore
Power	Wall Power	Encore

Digital Signage

	Digital Signage	Vendor
A/V	 4 x 55" LED 1080p 1920x1080 Vertical Monitor 4 x dual post floor stand 4 x Spandex wrap for floor stand – black 4 x USB thumb drive for content (sale item) Digital Signage Placement: Outside Manager Forum (Gold Ballroom) Inside Manager Forum (Gold Ballroom) Registration or Outside Meals Outside General Session (Platinum A-D) 	SSR
Power	Wall Power is sufficient for each sign	Encore

Offices

Atrium I	Morgan Stanley Staff Office Access by 10/23/23 – 8am Strike by 10/25/23 – 6pm	Vendor
General Setup	 4 x pods of 2 - 6' tables back-to-back for workstations 1 x 6' table for printer 4 x 6' tables set as a conference table in the middle of the room 	House Banquet
ΙΤ	 4 x Desktops (M900) 4 x Wired keyboard and mouse kits 9 x 24" Monitors Adapter to connect 1 monitor to personal laptop (USB-C) 2 x Laptops 2 x Wireless Mouse Kits 1 x Power strip per station 1 x Case of Paper 1 x Nighthawk Router 1 x Switcher 1 x Cross cut shredder 1 x Color Copier – wireless networked, with side sorting tray, staple function, and scan to email (industrial grade) 5000 copies (SHARP MX-5141) 	SSR
Internet	1 x DHCP internet drop	Encore
Power	Dedicated 20 amp for copier Wall Power for Computers	Encore

Atrium II	Marketing Storage Access by 10/23/23 – 8am Strike by 10/25/23 – 6pm	Vendor
General Setup	As directed by planner	Hotel Banquet

Atrium III	Pop-Up Office Access by 10/23/23 – 1pm Strike by 10/25/23 – 11am	Vendor
General Setup	As directed by planner	Hotel Banquet

Studio IV	AV Storage Access by 10/23/23 – 8am Strike by 10/25/23 – 11am	Vendor
General Setup	2 Tables 5 chairs	Hotel Banquet

Internet

	All Areas	
General Information	We require dedicated and uncontested bandwidth orders, plus Attendee WIFI.	Encore
	All hardwired internet lines must be direct open connections to the outside world. We can provide MAC address for our routers if required to ensure our connections are open. All the ports should be open with no splash page. The line should be monitored and the vendor should be able to increase the bandwidth if required.	
	 No splash screen or timeout (required) Network configuration: DHCP Network should have local DNS and a range of manually allocated (static DHCP) IP addresses for printers and servers Static IP range and network specifications (gateway, subnet and DNS) should be shared prior to arriving on-site No restrictions No MAC address filtering 	
	We prefer dedicated bandwidth per port to maintain critical parts of our network in the offices – please indicate what options are available to us.	

Internet: Attendee Wi-Fi	 300 attendee WI-FI connections To be up and running for testing on Monday 10/23/23 SSID: AIU2023 Password: conf2023 	Encore
Internet: Conference Hardline Network	 3 Hardwire Internet Ports. Dedicated bandwidth not affected by venue or attendee usage 1. Cvent Registration (10 MBPS down / 10 MBPS up) – Riverwalk Promenade Upper 2. MS Registration (5 MBPS) – Riverwalk Promenade Lower 3. Office (5 MBPS) – Orchid C This connection needs to be up and running for testing on Monday 10/23/23 @ 8am starting with MS Staff Office 	Encore

Security

- Platinum A-D To be locked overnight per producer direction
- Atrium I-III To be locked 24/7 with keys provided to MS Producer to distribute
- Registration One (1) Security Officer
 - Start 10/24 @ 7pm End 10/25 @ 6:00am

Schedule of Events

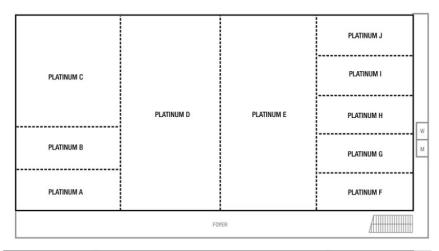
Date	Day	Start Time	End Time	Function Type	Set-Up Style	Function Space
10/23/2023	Mon	6:00 AM	11:59 PM	Offices	Conference	Atrium I
10/23/2023	Mon	6:00 AM	11:59 PM	Offices	Conference	Atrium II
10/23/2023	Mon	6:00 AM	11:59 PM	Exhibits	Exhibits	Gold Ballroom
10/23/2023	Mon	6:00 AM	11:59 PM	Offices	Conference	Studio IV
10/23/2023	Mon	1:00 PM	11:59 PM	Offices	Conference	Atrium III
10/23/2023	Mon	5:00 PM	11:59 PM	General Session	Crescent Rounds	Platinum A-D
10/23/2023	Mon	10:00 AM	10:30 AM	Coffee Break	Crescent Rounds	T latinum A-D
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10/24/2023	Tue	6:00 AM	11:59 PM	Meal Room	Rounds	Platinum E-J
10/24/2023	Tue	12:00 PM	1:00 PM	Lunch	Rounds of 10	Platinum E-J
10/24/2023	Tue	6:00 AM	11:59 PM	Offices	Conference	Studio IV
10/24/2023	Tue	6:00 AM	11:59 PM	Offices	Conference	Atrium II
10/24/2023	Tue	6:00 AM	11:59 PM	Exhibits	Exhibits	Gold Ballroom
10/24/2023	Tue	6:00 AM	11:59 PM	Offices	Conference	Atrium III
10/24/2023	Tue	6:00 AM	11:59 PM	General Session	Crescent Rounds	Platinum A-D
10/24/2023	Tue	2:30 PM	3:00 PM	PM Break	Clescent Rounds	Platinum A-D
10/24/2023	Tue	6:00 AM	11:59 PM	Offices	Conference	Atrium I
10/24/2023	Tue	5:00 PM	7:00 PM	Reception	Cocktail Rounds	West Road 1
10/25/2023	Wed	6:00 AM	11:00 AM	Offices	Conference	Atrium III
10/25/2023	Wed	6:00 AM	11:00 AM	Offices	Conference	Studio IV
10/25/2023	Wed	6:00 AM	2:00 PM	Meal Room	Rounds	Platinum E-J
10/25/2023	Wed	6:00 AM	6:00 PM	Offices Conference		Atrium I
10/25/2023	Wed	6:00 AM	6:00 PM	Offices	Conference	Atrium II
10/25/2023	Wed	6:00 AM	8:00 PM	Exhibits	Exhibits	Gold Ballroom
10/25/2023	Wed	6:00 AM	8:00 PM	General Session	Crescent Rounds	Platinum A-D

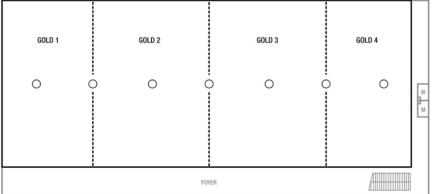
Date	Day	Start Time	End Time	Function Type	Set-Up Style	Function Space
10/25/2023	Wed	8:00 AM	9:00 AM	Breakfast	Rounds of 10	Platinum E-J
10/25/2023	Wed	10:00 AM	10:30 AM	AM Break	Existing Set-Up	Platinum Foyer
10/25/2023	Wed	12:00 PM	1:00 PM	Lunch	Rounds of 10	Platinum E-J
10/25/2023	Wed	2:00 PM	8:00 PM	No Agenda Hold	Crescent Rounds	Platinum E

Basic Function Room Drawing & Capacity Chart

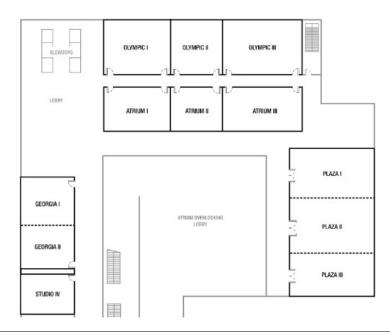
Meeting Room	Dimensions (LxWxH)	Area (sq ft)	Theater	Schoolroom	Conference	U-Shape	Reception	Banquet
Atrium I	38x27x9	1,030	77	48	24	33	114	80
Atrium II	26x27x9	745	66	36	22	25	82	50
Atrium III	27x44x9	1,220	118	60	24	34	135	80
Gold Ballroom	194x88x29	17,072	1500	885			1900	950
Platinum A-D, combined	94x113x25	10,622	1118	456	44	54	1180	740
Platinum E-J, combined	90x113x25	10,170	1070	448	44	54	1130	720

PLATINUM BALLROOM





MEETING SPACE



End of Brief