Morgan Stanley

Production Brief

National AIU East

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

Event Days	Tuesday, Sept 26 – Wednesday, Sept 27, 2023
Expected Attendance	400 attendees
Venue	**JW Marriott Turnberry** 19999 West Country Club Drive, Aventura Florida 33180

As of 7/3/23

Morgan Stanley

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Contact Information

Morgan Stanley Team

Producer(s)	**Danielle Rosen Shapiro** Danielle.rosen.shapiro@ms.com phone 212-761-4212 mobile 203-246-0422
Meeting Planner(s)	**Anna Carapella** Anna.carapella@morganstanley.com

Venue Details

Venue	JW Marriott Turnberry 19999 West Country Club Drive, Aventura Florida 33180
Venue Contact, CSM	
In-House A/V, Power & Internet	**Encore**

Production Vendors

Production Company	**Encore** Logan
Computer / IT Equipment	**SmartSource** Ken Edwards M: 917-952-9085 kedwards@thesmartsourcecom
Scenic	**Olson Visual** Kelly Olson M: 310-527-1094 KLOlson@olsonvisual.net
Manager Forum Booths	**Hargrove** Erik Bockelman M: 513.607.0520 erik.bockelman@encoreglobal.com

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.

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Draft Agenda

Day 1
- 2pm   Registration Open
- 5pm -7pm   Welcome Reception

Day 2
- 8am   General Session
- 11am   Manager Forum
- 12pm   Lunch
- 1pm   General Session
- 3pm   Manager Forum
- 4pm   Event Ends, Departures

Meeting Space

USE	FUNCTION SPACE
General Session	Majestic Ballroom 1-4
Manager Forum	Majestic Ballroom 5-8
Meals, Attendees	Royal Ballroom 1-4
Pop-Up Office	Keys Boardroom & Terrace
Marketing Storage	Palmetto 4
MS Staff Office	Palmetto 7
AV Storage	Palmetto 5
Reception	Royal Ballroom 1-4
Registration	TBD

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Schedule of Events

Date	Day	Start Time	End Time	Function Type	Post As/Signage	Set-Up Style	Expected	Function Space
9/25/23	Mon	8:00 AM	11:59 PM	Office	Boardroom	Conference	1	Keys Boardroom & Terrace
9/25/23	Mon	8:00 AM	11:59 PM	Set Up	General Session	Crescent Rounds	400	Majestic Ballroom 1-4
9/25/23	Mon	8:00 AM	11:59 PM	Office	Staff Offices	Conference	1	Palmetto 7
9/25/23	Mon	8:00 AM	11:59 PM	Storage	AV Storage	Special	1	Palmetto 5
9/25/23	Mon	8:00 AM	11:59 PM	Storage	Event Storage	Special	1	Palmetto 4
9/25/23	Mon	8:00 AM	11:59 PM	Set Up	Breakout/Exhibit Room	Exhibits	1	Majestic Ballroom 5-8
9/26/23	Tue	8:00 AM	11:59 PM	General Session	General Session	Crescent Rounds	400	Majestic Ballroom 1-4
9/26/23	Tue	2:30 PM	3:00 PM	Coffee Break	PM Break	Flow	400	Majestic South Foyer
9/26/23	Tue	8:00 AM	11:59 PM	Office	Staff Offices	Conference	1	Palmetto 7
9/26/23	Tue	8:00 AM	11:59 PM	Storage	AV Storage	Special	1	Palmetto 5
9/26/23	Tue	8:00 AM	11:59 PM	Storage	Event Storage	Special	1	Palmetto 4
9/26/23	Tue	8:00 AM	11:59 PM	Office	Boardroom	Conference	1	Keys Boardroom & Terrace
9/26/23	Tue	8:00 AM	11:59 PM	Breakout	Breakout/Exhibit Room	Exhibits	1	Majestic Ballroom 5-8
9/26/23	Tue	12:00 PM	1:00 PM	Lunch	Lunch	Rounds of 10	400	Royal Ballroom 1-4
9/26/23	Tue	6:00 PM	8:00 PM	Reception	Reception	Lounge	400	Royal Ballroom 1-4
9/27/23	Wed	8:00 AM	9:00 AM	Breakfast	Breakfast	Rounds of 10	400	Royal Ballroom 1-4
9/27/23	Wed	8:00 AM	11:59 PM	General Session	General Session	Crescent Rounds	400	Majestic Ballroom 1-4
9/27/23	Wed	10:00 AM	10:30 AM	Coffee Break	AM Break	Flow	400	Majestic South Foyer
9/27/23	Wed	8:00 AM	11:59 PM	Breakout	Breakout/Exhibit Room	Exhibits	1	Majestic Ballroom 5-8
9/27/23	Wed	8:00 AM	11:59 PM	Office	Staff Offices	Conference	1	Palmetto 7
9/27/23	Wed	8:00 AM	11:59 PM	Storage	AV Storage	Special	1	Palmetto 5
9/27/23	Wed	8:00 AM	11:59 PM	Storage	Event Storage	Special	1	Palmetto 4
9/27/23	Wed	8:00 AM	11:59 PM	Office	Boardroom	Conference	1	Keys Boardroom & Terrace
9/27/23	Wed	12:00 PM	1:00 PM	Lunch	Lunch	Rounds of 10	400	Royal Ballroom 1-4

Basic Function Room Drawing & Capacity Chart

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Estimated Production Schedule

DAY	TIME	ACTION	VENDOR	LOCATION
Set-up Day 1 – 9/25/23	8:00am	Office Load In Registration Load In	SmartSource Olson	
	8:00am	Power Drops Placed Hardline Internet Drops Placed	Encore	
	10:00am	Manager Forum Load In	Hargrove	
	10:00am	Offices Set	SmartSource	
	11:00am	Registration & Digital Signage Set Up	SmartSource	
	3:00pm	Registration Set for Cvent Load In	SmartSource	
Set-up Day 2 / Event Day 1 9/26/23	8:00am	General Session Load In	Encore	
	10:00am	Overnight Security Ends	Hotel	
	1:45pm	Manager Forum Set		
	2:00pm	Registration Set		
	4:30pm	Client Walk Through / Q2Q	Encore/MS	
	5:00pm	Reception Begins		
	7:00pm	Reception Ends Overnight Security Call Begins	Hotel	

DAY	TIME	ACTION	VENDOR	LOCATION
Event Day 2 – 9/27/23	6:30am	Overnight Security Call Ends	Hotel	
	6:30am	Crew Call	Encore	
	7:00am	Rehearsals (as needed)	Encore	
	7:30am	General Session Doors		
	8:00am	General Session Begins		
	10:45am	Manager Forum Begins		
	11:30am	Crew Lunch (Provided – from Attendee Buffet)	All	
	12:00pm	Rehearsals (if needed)		
	12:30pm	General Session Doors		
	12:55pm	General Session Begins		
	3:00pm	Manager Forum		
	4:00pm	Manager Forum Ends Load Out Begins	All	
	8:00pm	Load out Complete	All	

Room Drawings

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General Session

To Come

Manager Forum

To Come

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Requirements by Area

General Session

	General Session *Access by 9/25/23 at 8am* *Set by 9/26/23 by 4:00pm* *Strike at 9/27/23 at 3:30pm*	Vendor
General Setup (Seating)	50 72" tables (crescents of 6) = 300 seats 50 theater seats at the back Total of 350 seats	Hotel Banquet
House Risers	Stage 32' x 12' x 24" with standard hotel skirting Step units with handrails	Hotel Banquet
Staging	Lightbox Backdrop (32' L x 14' H) with 2 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 - 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. - The vendor can select a switching system of their choice but the comfort monitors must be independently switchable to only show PPT sources. 1 x Confidence monitors with surround - Perfect Cue System Light - Speaker Timer - H264 Video Record uploaded nightly to Box.com - Program Record (Switched feed of GFX and IMAG) - ISO of each camera - Backup Records of all 3 - Playback Pro for Video Playback The system we require should be capable of switching and routing the following minimum sources: **Inputs to data switcher**	Encore

	2 x Show PPT computer inputs (main and backup from Smartsource) • Video Camera System **Outputs from data switcher:** • Feeds to Screen(s) • Feeds to 1 x down stage comfort monitor	

Audio	The vendor should choose an audio system that is appropriate for the room and audience size. The system must produce an accurate re-enforcement 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
	    ○ 1 wired backup HH microphone.
	• The engineer (A1) should have the ability to record, edit and playback voice overs. Play background Music, walkups/ play-ons/ 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
		Encore

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

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Crew	The vendor should supply all staff to manage and operate the event, which should include but is not limited to: • Project Manager / Show Caller • Master Electrician capable of LD • Video Engineer / Switcher • 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.	Encore
Power	As Needed	Encore
IT	2 x show build laptops	SSR

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Manager Forum

	Manager Forum *Access by 9/25/23 - 8am* *Set by 9/26/23 – 1pm* *Strike at 9/27/23 – 1pm*	**Vendor**
General Setup	Up to 25 Booths Max 10' x 10' 3-sided hard wall booths. Provided signage to be attached 	
Furniture	25 x 60" Rounds with black linens 10 chairs per table	Hotel Banquet
IT	1 x Digital Monitor (see digital signage section)	SSR
AV	Speakers and laptop for playback of prerecorded announcements	Encore
Power	Wall Power	Encore
Cvent	25 x Scanners	CVent

Registration

	Access by 9/25/23 – 8am Ready by 9/26/23 – 12pm	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	Encore
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	Edlen
OnArrival	4 x iPad 4 x Printers	CVent

Offices
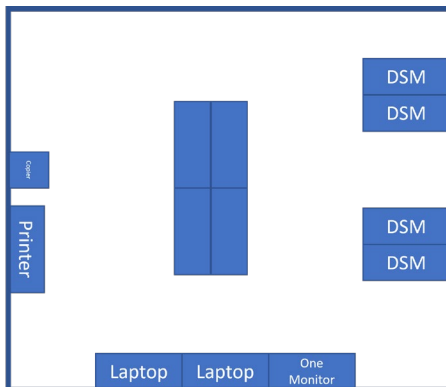
	Morgan Stanley Staff Office *Access by 9/25/23 – 8am* *Set by 9/25/23 – 10am* *Strike by 9/27/23 – 7pm*	**Vendor**
General Setup	4 x pods of 2 - 6' tables back-to-back for workstations 4 x 6' tables in middle for communal workspace	House Banquet
IT	4 x Desktops (M900) 4 x Wired keyboard and mouse kits 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

Orchid B	**Marketing Storage** *Access by 5/15/23 – 8am* *Strike by 5/17/23 – 7pm*	**Vendor**
General Setup	As directed by planner	Hotel Banquet

Orchid A	**Pop-Up Office** *Access by 5/15/23 – 8am* *Strike by 5/17/23 – 7pm*	**Vendor**
General Setup	Boardroom Style Table Set Up	Hotel Banquet

Orchid D	AV Storage *Access by 5/15/23 – 8am* *Strike by 5/17/23 – 7pm*	Vendor
General Setup	2 Tables 5 chairs	Hotel Banquet

Reception

	Tuesday Cocktail Party *Ready by 9/26/23 – 3pm* *Strike by 9/26/23 – 7pm*	Vendor
Audio	Small Speaker Setup for Music	Encore
Lighting	TBD – Possible ambience lighting	Encore

Attendee Meals

	Attendee Meals *Access by 9/26/23* *Strike 59/27/23 EOD*	Vendor
General Setup	As directed by planner	Hotel Banquet

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: • At Registration • Inside Manager Forum • Outside Meal Room • Outside General Session	SSR
Power	Wall Power is sufficient for each sign	

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Internet

	All Areas	
General Information	We require dedicated and uncontested bandwidth orders, plus Attendee WIFI. 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.	Encore

Internet: Attendee Wi-Fi	300 attendee WI-FI connections
	• To be up and running for testing on Monday 9/25/23
	  o SSID: AIU2023
	  o Password: conf2023
	
	WIFI to be bridged across contracted hotel space and conference center space
		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) 2. MS Registration (5 MBPS) 3. Office (5 MBPS) This connection needs to be up and running for testing on Monday 9/25 @ 8am starting with MS Staff Office	Encore

Security

• **General Session** – To be locked overnight per producer direction

• **Offices** – To be locked 24/7 with keys provided to MS Producer to distribute

• **Registration Area** – One (1) Security Officer

  ▪ Start 9/26 @ 7pm – End 9/27 @ 6:30am

End of Brief