



# **APEX Housing & Registration Accepted Practices**

*Approved by the Convention Industry Council on August 10, 2005*

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*\*Special Note: The term Housing Facility, which is used throughout this report, refers to any establishment that offers lodging to transient travelers and/or groups. Examples of housing facilities are hotels, resorts, conference centers, motels, inns, and bed & breakfasts.*

## PREFACE

APEX (Accepted Practices Exchange), an initiative of the Convention Industry Council (CIC), is uniting the entire meetings, conventions and exhibitions industry in the development and implementation of voluntary standards, called *accepted practices*.

This report outlines the accepted practices in the areas of Housing and Registration as defined by the APEX Housing & Registration Panel. This panel was charged with developing industry accepted practices for collecting, reporting, and retrieving complete housing and registration data for meetings, conventions, and other events. A secondary charge was to recommend industry accepted practices around housing issues such as housing providers, Internet issues, international housing, and disclosure.

In its work, the Housing & Registration Panel considered a number of existing accepted practices (including APEX Post-Event Reporting accepted practices\*) and identified other best practices throughout the industry (including those summarized in the Convention Industry Council's *Project Attrition Final Report\**). The result is the following report.

\*See [www.conventionindustry.org](http://www.conventionindustry.org) for these resources.

# PART I: FORMS

See the following pages for all forms, templates, and related information.

- A. APEX Event Registration Form
  - 1. Accepted Practices
  - 2. Procedures and Instructions
  - 3. Form Template
  
- B. APEX Housing Form
  - 1. Accepted Practices
  - 2. Procedures and Instructions
  - 3. Form Template
  
- C. APEX Rooming List
  - 1. Accepted Practices
  - 2. Instructions for Event Organizers
  - 3. Instructions for Housing Facilities
  - 4. Best Practices for Event Organizers and Housing Facilities
  - 5. Rooming List Template

## A. APEX Event Registration Form

### 1. ACCEPTED PRACTICES

- a. The APEX Event Registration Form is the industry accepted structure for forms by which attendees can register to attend events of all types. The form can be produced on paper or electronically, and may be designed by event organizers to reflect the “look and feel” of the event or the host organization. All design should be clear, concise, and, if printed, include enough room to hand-write information.
- b. On the APEX Event Registration Form template, any information enclosed in [brackets] is instruction to the person developing the form and should be deleted once the form has been developed and is ready for public distribution. The event organizer may also add event-specific information that is required for the effective planning and implementation of each event.
- c. The \$ symbol is a currency placeholder only. There is no requirement that all funds be in dollars.
- d. When an event organizer provides the option of downloading a printed form from a website, the form should be a PDF file in order to prevent editing of key information or layout.
- e. Procedures and instructions for attendees should be included on the same page as the form to be completed. If this is not possible, the procedures and instructions should be on the page facing or immediately preceding the actual form (for printed materials).
- f. All sections of the APEX Event Registration Form will not apply to every event. Any section that does not apply should not be included.
- g. Each event organizer must identify on the form the required information that is specific to each event. Required information should be designated with an asterisk (\*) and a notation should be made on the form that “\*These fields are required in order for this form to be processed.”
- h. The APEX Event Registration Form will be regularly updated based on the industry’s collaborative feedback.
- i. An event’s housing and registration forms should be combined if the processes are not too complex. This is at the discretion of the event organizer.

### 2. PROCEDURES & INSTRUCTIONS

Procedures and instructions for attendees should be included on the same page as the form to be completed. If space does not allow, place this instructional information on a facing page in the registration brochure. The following sections should be used and tailored to the specific event. Information enclosed in [brackets] is instruction to the person developing the form and should be deleted once the form has been developed and is ready for public distribution. The event organizer may also add event-specific information that is required for the effective planning and implementation of each event.

#### Event Registration Can Be Completed By:

Please use only one method to complete your event registration:

*[Indicate all methods that are applicable to the event including, but not limited to:]*

- Telephone: *[Note if the attendee should call the event organizer, or other entity. Include 1) the name of the person/company to call, 2) days and hours of operation, and 3) the telephone number(s) with appropriate country/city/area codes. Note if there are different procedures for international attendees.]*
- Fax: Complete this form and send it via fax to *[fax number(s) with appropriate country/city/area codes]*. *[If appropriate, add instructions to include “ATTN: Person or Department” so that the form is efficiently delivered.]*
- Internet: Complete this form on a secure connection at *[URL]*. *[Note what should be expected in the way of confirmation in order to ensure completion of the on-line form.]*

- Mail: Complete this form and mail it with payment to: *[Note mailing instructions including 1) Event Name, 2) Mailing Address, 3) City, 4) State/Province, 5) Postal/Zip Code, and 6) Country. If appropriate, add instructions to include "ATTN: Person or Department" so that the form is efficiently delivered.]*

#### Acknowledgement of Event Registration:

*[Note whether or not acknowledgements of registrations will be sent to attendees, and if they will be, indicate the procedure (for example, The XYZ Conference will send an acknowledgement of your registration via email within one day of your reservation being received. Your badge and credentials will be sent by mail three weeks prior to the start of the event). If you require attendees to provide an email address, or other contact information, in order to receive their acknowledgements, state so here and indicate that requirement on the Event Registration Form with an asterisk (\*).]*

#### Fees & Deadlines:

*[Describe all types and categories of registration fees offered, indicating the time frame during which they are offered, and the functions and services (for example, shuttle service) that are included in each fee. This section should describe any discounts offered for multiple attendees from the same company or organization. Additionally make note of: 1) any functions that are NOT included in the general registration fee, indicating the fee for each of these items; 2) the type of currency in which all fees must be paid; 3) the final deadline for registration; and, 4) whether or not registration will be available on-site at the event. Disclose any information the attendee should know about the registration fees (for example, \$10 is included in the registration fees to offset direct costs including shuttle service).]*

#### Payment Methods Accepted:

*[Include event-specific payment instructions (for example, Any registration form received without a valid payment will not be processed. Another example is Selection of an incorrect registration category may require rate adjustment). Indicate all acceptable methods of payment and any related fees that are applicable such as check, money order, credit card (indicate types), wire transfer (indicate associated fees charged), or purchase order. Specify the name of the merchant that will be noted on credit card statements for all charges.]*

#### Changes, Cancellations, & Refunds:

*[Clearly state the applicable policies and dates regarding the making, modifying or canceling of an event registration. Note: 1) any fees charged for canceling, and when they will be charged; 2) if the cancellation fee increases the closer a cancellation is made to the event start date; 3) how and when refunds will be made; 4) if refunds will not be given on cancellations made after a specific date, the process for substituting attendees (for example, if a company can pay one registration fee and a different person comes each day, or if one person registers and another comes in his or her place; and, 5) exactly how requests for changes, cancellations, and/or refunds should be made (for example, requests must be made in writing and received by the Event Organizer by <<Date>>)]*

#### Deadlines & Reminders:

*[Include event-specific information and reminders here (for example, "Don't forget to fill out your Housing Form!" or state how and when badges/tickets will be distributed). Additional examples of information to be included here are the deadline dates for: cancellation with full refund; making housing reservations at the discounted event rate; making changes and cancellations to registration; receiving discounted registration fees; being listed in the registration directory; and/or cancellation with partial refund.]*

[Add Additional Event-Specific Sections to the Registration Procedures as Required.]

# APEX EVENT REGISTRATION FORM TEMPLATE

## [HEADER]

[At a minimum, the following information should be included in this area:

- Event Name
- Event Dates in <<MonthName StartDate-EndDate, Year>> Format
- Name of Primary Event Facility
- Event City, State/Province, Country
- Deadline for Submitting the Event Registration Form & Receiving Event-Specific Rates

Additional form header content may include:

- Event Logo
- Event Organizer Logo
- Other pertinent information determined by the event organizer]

## ATTENDEE INFORMATION

\*These fields are required in order for this form to be processed.

Prefix (Mr., Ms., Dr., etc.): \_\_\_\_\_ Given Name/First Name: \_\_\_\_\_ MiddleName/Initial: \_\_\_\_\_

Family Name (as appears on passport): \_\_\_\_\_ Suffix(s) (Jr., MD, CPA, etc.): \_\_\_\_\_

Preferred Name (for badge): \_\_\_\_\_

Employer/Organization: \_\_\_\_\_ Job Title: \_\_\_\_\_

Preferred Mailing Address:

Address1: \_\_\_\_\_ Address2: \_\_\_\_\_  
City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Employer/Organization Mailing Address:  Same As Preferred Mailing Address

If different from preferred address, complete the following:

Address1: \_\_\_\_\_ Address2: \_\_\_\_\_  
City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Preferred Phone: \_\_\_\_\_ (Include appropriate country, city, and area codes)

Mobile Phone: \_\_\_\_\_ (Include appropriate country, city, and area codes)

Fax: \_\_\_\_\_ (Include appropriate country, city, and area codes)


Email: \_\_\_\_\_

Preferred Method for Receiving Acknowledgement of Registration:  Email  Fax  Mail

Would you like to be contacted by event sponsors and exhibitors prior to the event?  Yes By Email  Yes By Fax  Yes By Mail  No

Attendee Type [List all attendee categories the Event Organizer desires to track, for example, Member, Speaker, Exhibitor, Guest]:

- [Attendee Type 1]
- [Attendee Type 2]
- Additional Attendee Types As Necessary

Do you have any special physical , dietary (for example, vegetarian, kosher), or other needs:  Yes  No  
If yes, please describe: \_\_\_\_\_

[Event-Specific Attendee Information - Use this section to add additional questions that are specific to this event. For example: Are you a first-time attendee for the XYZ Conference?  Yes  No and, If No, How many times have you attended? \_\_\_\_\_]

## ON-SITE EMERGENCY INFORMATION

Where you are staying during the event? \_\_\_\_\_ (for example, name of hotel, with a family member, at home)

In Case of Emergency:

Name of Person to Contact: \_\_\_\_\_  
Phone: \_\_\_\_\_ (Include appropriate country, city, and area codes)  
Relationship to You: \_\_\_\_\_

## REGISTRATION FEES

All fees are in [note type of currency]. [Note if any functions are limited by space or other requirements]

	Before [Date]	After [Date]	Additional Date Categories As Necessary
[AttendeeType1]			
[FeeType1]	<input type="checkbox"/> <<\$Amount>>	<input type="checkbox"/> <<\$Amount>>	
[FeeType2]	<input type="checkbox"/> <<\$Amount>>	<input type="checkbox"/> <<\$Amount>>	

Additional Fee Types As Necessary

[AttendeeType2]			
[FeeType1]	<input type="checkbox"/> <<\$Amount>>	<input type="checkbox"/> <<\$Amount>>	
[FeeType2]	<input type="checkbox"/> <<\$Amount>>	<input type="checkbox"/> <<\$Amount>>	

Additional Fee Types As Necessary

Additional Attendee Types as Necessary

Note any discounts that are available

Total Cost – Payment Due                      \$ \_\_\_\_\_                      \$ \_\_\_\_\_

[An event's Fee Types could be Full Registration, One-Day Registration, Special Session/Event #1, etc.]

## PAYMENT INFORMATION

Please...only one form of payment per registration!

[Include any special event-specific instructions (for example, Any registration form received without a valid deposit will not be processed).  
Indicate all methods of payment that are applicable to the event including, but not limited to:]

Check    Money Order

If paying by check or money order, make it payable to <<Payee>> and mail with this form to: <<Payee>>, <<MailingAddress>>,  
<<City>>, <<State/Province>>, <<Postal/Zip Code>>, <<Country>>.

<<CardTypeAccepted1>>    <<CardTypeAccepted2>>    <<CardTypeAccepted3>>    Additional card types as necessary

Credit Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ NOTE: All credit cards must be valid through the dates of the event.

Card's Security Code: \_\_\_\_\_

Cardholder's Name: \_\_\_\_\_

Cardholder's Signature: \_\_\_\_\_

Today's Date: \_\_\_\_\_

Billing Address (If Different from Preferred Mailing Address):

Address1: \_\_\_\_\_ Address2: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Additional Forms of Payment As Necessary (such as wire transfers or purchase orders)

## ACKNOWLEDGEMENTS

[Reiterate all policies outlined in the Registration Procedures regarding acknowledgements.]

## SEND COMPLETED REGISTRATION FORMS TO:

[Reiterate all methods by which reservations can be made outlined in the Registration Procedures.]

## B. APEX Housing Form

### 1. ACCEPTED PRACTICES

- a. The APEX Housing Form is the industry accepted structure for forms by which attendees can make housing reservations through an event organizer. The form can be produced on paper or electronically, and may be designed by event organizers to reflect the “look and feel” of the event or the host organization. All design should be clear, concise, and, if printed, include enough room to hand-write information.
- b. On the APEX Housing Form template, any information enclosed in [brackets] is instruction to the person developing the form and should be deleted once the form has been developed and is ready for public distribution. The event organizer may also add event-specific information that is required for the effective planning and implementation of each event.
- c. The \$ symbol is a currency placeholder only. There is no requirement that all funds be in dollars.
- d. When an event organizer provides the option of downloading a printed form from a website, the form should be a PDF file in order to prevent editing of key information or layout.
- e. Procedures and instructions for attendees should be included on the same page as the form to be completed. If this is not possible, the instructions should be on the page facing or immediately preceding the actual form (for printed materials).
- f. All sections of the APEX Housing Form will not apply to every event. Any section that does not apply should not be included.
- g. Each event organizer must identify on the form the required information that is specific to each event. Required information should be designated with an asterisk (\*) and a notation should be made on the form that “\*These fields are required in order for this form to be processed.”
- h. An event organizer should share each housing form with the event-specific housing facility(s) prior to public release in order to ensure that all information needed to service guests is being collected.
- i. Event organizers and/or their housing providers should respond to reservation requests within a reasonable timeframe and advise guests when to expect a response and by what methods.
- j. The APEX Housing Form will be regularly updated based on the industry’s collaborative feedback.
- k. An event’s housing and registration forms should be combined if the processes are not too complex. This is at the discretion of the event organizer.
- l. Event organizers should make event attendees aware of and knowledgeable about the housing process and the official housing facility. With knowledge, attendees may be more likely to book within the event’s room block. Communication is key to success in this area. *See also Part II, Section A-2-k.*
- m. If the event organizer or a designated housing bureau is controlling the housing process, the organizer or housing bureau should share preliminary pick-up information with the housing facility. This information should be shared as reservations begin to materialize. For example, room pick-up should be shared at pre-designated “benchmark” dates such as 120 days, 90 days, 60 days and 45 days from the start of the event. Also, registration numbers (not names) should be shared by the organizer, if requested by the housing facility. If the organizer and/or housing bureau has the technology available, real-time housing and registration data should be accessible on-line on a “view only” basis. Conversely, if the housing facility is controlling the housing process, the organizer should have access to real time reservations and room pick-up data, including names and confirmation numbers on a “view only,” password-protected basis.

## 2. PROCEDURES & INSTRUCTIONS

Procedures and instructions for attendees should be included on the same page as the form to be completed. The following sections should be used and tailored to the specific event. Information enclosed in [brackets] is instruction to the person developing the form and should be deleted once the form has been developed and is ready for public distribution. The event organizer may also add event-specific information that is required for the effective planning and implementation of each event.

### Housing Reservations Can Be Made By:

Please use only one method to make your housing reservation:

*[Indicate all methods that are applicable to the event including, but not limited to:]*

- Telephone: *[Note if the attendee should call the event organizer, housing bureau or housing facility directly. Include 1) the name of the company/property to call, 2) days and hours of operation, 3) the telephone number(s) with appropriate country/city/area codes, and 4) any reference code for the event. Note if there are different procedures for international attendees.]*
- Fax: Complete this form and send it via fax to *[fax number(s) with appropriate country/city/area codes]*. *[If appropriate, add instructions to include "ATTN: Person or Department" so that the form is efficiently delivered.]*
- Internet: Complete this form on a secure connection at *[URL]*. *[Note what should be expected in the way of confirmation in order to ensure completion of the on-line form.]*
- Mail: Complete this form and mail it with payment to: *[Note mailing instructions including 1) Event Name, 2) Mailing Address, 3) City, 4) State/Province, 5) Postal/Zip Code, and 6) Country. If appropriate, add instructions to include "ATTN: Person or Department" so that the form is efficiently delivered.]*

### Acknowledgement of Reservations:

*[Note whether or not acknowledgements of reservations will be sent to attendees, and if they will be, indicate the procedure (for example, The XYZ Conference will send an acknowledgement of your reservation via email within 10 days of your reservation being received.). Also note whether or not this acknowledgement will include a confirmation number from the housing facility. If you require attendees to provide an email address, or other contact information, in order to receive their acknowledgements, state so here and indicate that requirement on the Housing Form with an asterisk (\*). An example of language for this section is: The XYZ Conference Housing Bureau will send you an acknowledgement of your reservation. Please review all information for accuracy. E-mail confirmations will be sent within <<NumberOfDays>> of your reservation being processed. If you do not receive an acknowledgement in this time frame, please contact the XYZ Conference Housing Bureau. You may also check your reservation via the internet at www.xyz.net, regardless of how you booked your reservation. You will not receive a confirmation directly from the housing facility.]*

### Rates & Taxes:

*[Indicate the rate(s) offered for each housing facility where rooms for the event are available. Include the dates that the special rate(s) will be honored. Include information on any applicable taxes (for example, tax per room per night in dollars and percentage of room rate) or fees (like resort fees). Disclose any information the attendee should know about the housing rates (for example, \$10 is included in the daily housing rate to offset direct costs including shuttle service, registration technology use, etc.). An example of language for this section is: To take advantage of the special <<Event>> rates, make your reservation by <<Date>>. After this date the official <<Event>> room block(s) will be released and the hotel may charge higher rates. All rates are per room per night and are subject to a <<%>> tax. Rates also include <<\$Amount>> to offset event-related housing costs including <<shuttle service, etc.>>. The hotel may charge additional fees for rooms with more than one occupant.]*

*[For all options available, this section should include the housing facility name(s), address(es), and rates, and locations.]*

### Payment Methods Accepted:

*[Include any special event-specific payment instructions (for example, Any form received without a valid payment will not be processed). Indicate all methods of payment and any related fees that are applicable to the event including, but not limited to: check; money order; credit card (indicate types); wire transfer*

*(indicate associated fees charged); or purchase order. Specify the name of the merchant that will be noted on credit card statements for all charges.]*

Special Requests:

Special requests for specific room types cannot be guaranteed. Requests will be honored based on availability.

Deposits:

*[Indicate any required deposit amounts and applicable rules (for example, All reservations requests must be accompanied by a deposit in the amount of \$XX. Housing Forms received without a valid deposit will not be processed.). Note whether deposits are non-refundable, identify when credit cards will be charged, and any other event-specific rules and regulations regarding deposits. See the complete accepted practices for the areas of Housing & Registration for recommendations about deposits (Part II).]*

Changes, Cancellations, Refunds & Early Departures:

*[Clearly state the applicable policies and dates regarding the making, modifying or canceling of a room reservation. Note any fees charged for canceling, and when they will be charged. Indicate if the cancellation fee increases the closer a cancellation is made to the planned arrival date. Also, clearly outline any fees that will be charged if an attendee departs earlier than a reservation ends. State any policy regarding refunds if rooms are resold. Note any applicable housing facility cancellation policy. An example of language for this section is: Reservations may be changed or cancelled until <<Date>> without penalty. Changes, including shortened stays and substitutions, and cancellations received after <<Date>> will be assessed a <\$Amount>> processing fee. Your deposit will be forfeited if you do not cancel by <<Date>>. Use the XYZ Conference Housing Bureau for all changes and cancellation until <<Date>> by calling <<Phone>>. Do not contact the hotel directly until after <<Date>>.]*

Deadlines & Reminders:

*[Include event-specific information and reminders here (for example, "Don't forget to fill out your Event Registration Form!"). This section could include information on special air or car rental rates that have been negotiated for the event and how to get them, or a privacy statement here.]*

[Add Additional Event-Specific Sections to the Housing Procedures as Required.]

# APEX HOUSING FORM TEMPLATE

## [HEADER]

[At a minimum, the following information should be included at the top of every housing form:

- Event Name
- Event Dates in <<MonthName StartDate-EndDate, Year>> Format
- Name of Primary Event Facility
- Event City, State/Province, Country
- Deadline for Submitting the Housing Form & Receiving Event-Specific Rates

Additional form header content may include:

- Event Logo
- Event Organizer Logo
- Other pertinent information determined by the event organizer]

## CONTACT INFORMATION

\*These fields are required in order for this form to be processed.

Prefix (Mr., Ms., Dr., etc.): \_\_\_\_\_ Given Name/First Name: \_\_\_\_\_ MiddleName/Initial: \_\_\_\_\_

Family Name (as appears on passport): \_\_\_\_\_ Suffix(s) (Jr., MD, CPA, etc.): \_\_\_\_\_

Employer/Organization: \_\_\_\_\_

Preferred Mailing Address:

Address1: \_\_\_\_\_ Address2: \_\_\_\_\_  
City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Employer/Organization Mailing Address:  Same As Preferred Mailing Address

If different from preferred address, complete the following:

Address1: \_\_\_\_\_ Address2: \_\_\_\_\_  
City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Preferred Phone: \_\_\_\_\_ (Include appropriate country, city, and area codes)

Mobile Phone: \_\_\_\_\_ (Include appropriate country, city, and area codes)

Fax: \_\_\_\_\_ (Include appropriate country, city, and area codes)

Email: \_\_\_\_\_

Preferred Method for Receiving Acknowledgement of Reservation Request:  Email  Fax  Mail

[Event-Specific Attendee Information - Use this section to add additional questions of attendees that are specific to this event.]

## RESERVATION INFORMATION

Arrival (Day & Date): \_\_\_\_\_ (for example, Monday 12/31/2006) Departure (Day & Date): \_\_\_\_\_

Guest Type:  Attendee  Exhibitor  Additional Guest Types As Necessary

Housing Facility: [If only one option is available, the housing facility name, address and rates should be included directly on the Housing Form. If more than one option is available, all housing facility names, addresses, rates, and locations should be included in the Housing Procedures under the "Rates & Taxes" section. In this instance, this section should direct the attendee to list a specified number of housing facility choices in order of preference (entering the name of the preferred housing facility). A note should be made that preferences will be accommodated based on availability. The event organizer may want to include a question that asks "If hotel preferences are not available, do you prefer location or rate?"]

Room Type Requested:  Single   Double   Double/Double   Triple   Quad 


If you would like to request a suite, please contact <<name, phone number, fax number, email>> for more information.

Smoking  Non-Smoking

Bed Type Requested:  Bed Type 1 (defined by event organizer)  Bed Type 2 (defined by event organizer)

Additional Bed Types as Necessary

Do you have any special needs or requests:  Yes  No

If yes, please describe: \_\_\_\_\_ (for example, accessible accommodations , early/late arrival, non-feather pillows, bed size)

Please note:

- Room types and special requests are not guaranteed.
- The housing facility will assign specific room types at check in, based upon availability.
- Some requests such as rollaway beds, cribs or extra refrigerators may incur additional charges.

Rewards Program: \_\_\_\_\_ Rewards Program Number: \_\_\_\_\_

Are You Sharing Your Room With Other Occupants?  Yes  No

*If Yes, list all room occupants. Individuals listed here should not submit their own Housing Forms :*

1. Prefix: \_\_\_\_\_ Given Name/First Name: \_\_\_\_\_ MiddleName/Initial: \_\_\_\_\_ Family Name: \_\_\_\_\_ Suffix(s): \_\_\_\_\_  
Arrival Date: \_\_\_\_\_ Departure Date: \_\_\_\_\_
2. Prefix: \_\_\_\_\_ Given Name/First Name: \_\_\_\_\_ MiddleName/Initial: \_\_\_\_\_ Family Name: \_\_\_\_\_ Suffix(s): \_\_\_\_\_  
Arrival Date: \_\_\_\_\_ Departure Date: \_\_\_\_\_
3. *Additional Shares as Necessary*

### **\*PAYMENT INFORMATION**

*Please...only one form of payment per reservation!*

*[Include any special event-specific instructions (for example, A deposit in the amount of \$ must accompany a reservations request, Any housing form received without a valid deposit will not be processed). Indicate all methods of payment that are applicable to the event including, but not limited to:]*

Check  Money Order

If paying by check or money order, make it payable to <<Payee>> and mail with this form to: <<Payee>>, <<MailingAddress>>, <<City>>, <<State/Province>>, <<Postal/Zip Code>>, <<Country>>.

<<CardTypeAccepted1>>  <<CardTypeAccepted2>>  <<CardTypeAccepted3>>  *Additional card types as necessary*

Credit Card Number: \_\_\_\_\_  
Expiration Date: \_\_\_\_\_ *NOTE: All credit cards must be valid through the dates of the event.*  
Card's Security Code: \_\_\_\_\_  
Cardholder's Name: \_\_\_\_\_  
Cardholder's Signature: \_\_\_\_\_  
Today's Date: \_\_\_\_\_  
Billing Address (If Different from Preferred Mailing Address):  
Address1: \_\_\_\_\_ Address2: \_\_\_\_\_  
City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

*Additional Forms of Payment As Necessary (such as wire transfers or purchase orders)*

### **CHANGES,CANCELLATIONS, REFUNDS**

*[Reiterate all policies outlined in the Housing Procedures regarding payments, deposits, changes, cancellations, refunds, etc.]*

### **ACKNOWLEDGEMENTS**

*[Reiterate all policies outlined in the Housing Procedures regarding acknowledgements.]*

### **SEND COMPLETE HOUSING FORMS TO:**

*[Reiterate all methods by which reservations can be made outlined in the Housing Procedures.]*

## C. APEX Rooming List

### 1. ACCEPTED PRACTICES

- a. The APEX Rooming List is the industry accepted format by which event organizers and/or their designates should deliver multiple reservations to a housing facility.
- b. On the APEX Rooming List, any information enclosed in [brackets] is instruction to the person developing the form and should be deleted once the form has been developed and is ready for distribution.
- c. The \$ symbol is a currency placeholder only. There is no requirement that all funds be in dollars.
- d. The APEX Rooming List will be regularly updated based on the industry's collaborative feedback.

### 2. INSTRUCTIONS FOR EVENT ORGANIZERS

The APEX Rooming List is designed to simplify and standardize the process of assembling rooming lists for guest rooms within the Event-Contracted Block (ECB) *See also Part II, Section A-1*. Because items unique to individual events must be accounted for, the event organizer (or designate) using the form must initially perform a series of easy set-up steps so that the form reflects the event's particular character and needs.

- a. Advise the contract housing facility(s) that the APEX Rooming List format will be used for this event.
- b. Enter the event name in the space provided.
- c. Enter the event's earliest contracted arrival date and latest departure date in the spaces provided.
- d. Enter the event organizer/host name and contact information in the spaces provided.
- e. Enter the facility name in the area provided. If rooms are contracted at more than one facility, in automated versions of the APEX Rooming List, all facility names should be included in a drop-down list and the user should be able to select a facility from that list.
- f. Enter the currency type to be used. In automated versions of the APEX Rooming List, the event organizer should be able to select from a drop-down list of currency types.
- g. In the area provided, list all event-specific rate types (for example, Staff, Exhibitor, Speaker) by facility if there is more than one. In automated versions of the APEX Rooming List, this will populate a drop-down list for use as entries are made.
- h. In the areas provided, enter the room types that have been contracted for the event.
- i. FOR THE ORIGINAL ROOMING LIST: Upon completing the original rooming list, submit it to the housing facility according to the agreed upon method (for example, email, fax). Once the facility has entered the reservations, the facility's staff is responsible for reporting back according to the agreement (for example, confirmations back to the event organizer, to the individual attendees, a complete/updated rooming list back to the event organizer).
- j. SUBSEQUENT CHANGES AND CANCELLATIONS TO LIST: After the original rooming list has been sent, all additional reservations, changes and cancellations must be sent in a separate list and dated. If confirmation codes or numbers have been provided by the facility, include the confirmation codes with all reservations that are changing or being cancelled. All other reservations on the original list have not changed and do not need to be sent. Once the facility has entered the changes, the facility's staff is responsible for reporting back according to the contract for the event (for example, confirmations back to the event organizer, to the individual attendees, a complete/updated rooming list back to the event organizer, etc.).

When preparing subsequent lists for submission, the event organizer should select "Addition," "Modification" or "Cancellation" for each reservation on the list as appropriate. The "Date/Time" field should be completed. In automated versions of the APEX Rooming List, this field should automatically update to reflect the latest date/time the list was saved.

- k. See Part I, Section C-4 for Best Practices when working with Rooming Lists.

### 3. INSTRUCTIONS FOR HOUSING FACILITIES

- a. Recognize that the Rooming List process will follow APEX Rooming List accepted practices.
- b. Validate that data fields provided by the event organizer match contracted arrangements and actual inventory.
- c. Once the original rooming list is received, review for compliance with contractual terms including room block by room type and date. Adjust as necessary and advise event organizer.
- d. After initial list is received, expect additions, modifications and cancellations in separate dated lists.
- e. The facility will need to provide individual reservation confirmations back to the event organizer for each list received in date and time order.
- f. Rooming lists with credit cards are not secure. Lists should be secured properly.
- g. See Part I, Section C-4 for Best Practices when working with Rooming Lists.

### 4. BEST PRACTICES FOR EVENT ORGANIZERS AND HOUSING FACILITIES

- a. Always save every rooming list as a separate file. Do not overwrite lists so that historic information is preserved.
- b. Event organizers should date every rooming list that is sent to a housing facility. It helps with the reservation reconciliation process.
- c. Ensure that the rooming list has multiple sort conditions (for example, room type, arrival date).
- d. Shares (roommates) should only be associated with a primary guest reservation. It is not necessary to create individual reservations for shares, however, names should be captured and recorded for reference.
- e. Additions, modifications and cancellations should be compiled into daily lists and submitted in bulk (as opposed to delivering individual changes).
- f. Event organizers should always reconcile the rooming lists sent to a housing facility with the facility's actual manifest to ensure all data was entered correctly. This greatly reduces problems at check-in.
- g. For modified reservations, always identify the original data and what is changed. For example:
  - Guest Name Was: John Smith
  - Guest Name Now: Bill Miller
- h. Event organizers should not resend an entire original rooming list to a property with changes. Only send the additions, modifications and cancellations since the last time a list was sent.

# APEX ROOMING LIST TEMPLATE

<<Event Name>>  <<Event Organizer/Host>>  Dates: <<Earliest Arrival Date>> <<Latest Departure Date>>  Key Housing Contact: <<Prefix>> <<GivenName/Initial>> <<MiddleName/Initial>> <<FamilyName>> <<Suffix(s)>>  <<Address1>> <<Address2>> <<City>>, <<State/Province>> <<Postal/Zip Code>> <<Country>>  <<Phone>> <<Fax>> <<Email>>	Rooming List For: <<FacilityName>>  Report Created: <<Date/Time>>  Report Status: <span style="float: right;"><i>Drop Down Options:</i></span> <input type="checkbox"/> Original Rooming List <input type="checkbox"/> Additions <input type="checkbox"/> Modifications <input type="checkbox"/> Cancellations <input type="checkbox"/> Other: _____  Currency Type: <span style="float: right;"><i>Drop Down Options:</i></span> \$ (Default) <input type="checkbox"/> Currency <input type="checkbox"/> Currency <input type="checkbox"/> Currency <input type="checkbox"/> Etc.  Group Code: _____
---	---

Contact & Share-with Information	Reservation Information	Comments & Guarantee
<<FamilyName>>, <<Prefix>> <<GivenName/Initial>>, <<MiddleName/Initial>>, <<Suffix(s)>> <<Organization>> (Optional) <<Address1>> <<Address2>> <<City>>, <<State/Province>> <<Postal/Zip Code>> <<Country>> <<Email>> <<Phone with appropriate country, city, and area codes >> <<Fax with appropriate country, city, and area codes >>  <b>Share With:</b> 1. <<FamilyName>>, <<Prefix>> <<GivenName/Initial>>, <<MiddleName/Initial>>, <<Suffix(s)>>: <<ArrivalDate>> - <<DepartureDate>> 2. <<FamilyName>>, <<Prefix>> <<GivenName/Initial>>, <<MiddleName/Initial>>, <<Suffix(s)>>: <<ArrivalDate>> - <<DepartureDate>> 3. Repeat as needed for additional roommates	Stay Dates: <<Arrival Day>> <<ArrivalDate>> - <<DepartureDay>> <<DepartureDate>>  Nights: <<NumberOfNights>> (should be auto-calc based on stay dates)  Room <i>Drop Down Options:</i> Type: <i>*to be defined by event organizer</i> <input type="checkbox"/> Room Type <input type="checkbox"/> Room Type <input type="checkbox"/> Etc.  Bed Type: <i>Drop Down Options:</i> <i>*to be defined by event organizer</i> <input type="checkbox"/> Bed Type <input type="checkbox"/> Bed Type <input type="checkbox"/> Etc.  Special Needs & Requests: <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If Yes, Specify in Comments (This information can            be pulled from the APEX Housing Form).</i>  <input type="checkbox"/> Smoking Requested <input type="checkbox"/> Non-Smoking Requested <input type="checkbox"/> No Preference  Guest Status: <input type="checkbox"/> VIP  Confirmation Number: _____	Comments: _____ (indicate upgrades, early or late arrival, early or late departure, and other special notes)  Rewards Program/#: _____  Deposit: \$ _____  Guarantee*: Payment Type  Rate Type: <input type="checkbox"/> Rate Type 1 <input type="checkbox"/> Rate Type 2 <input type="checkbox"/> <i>Additional Rate Types as Necessary</i> <input type="checkbox"/> Staff: _____ (#) nights <input type="checkbox"/> Comp: _____ (#) nights

\*Note that to comply with credit card company requirements, the initial APEX rooming list will not require credit card guarantees.

# PART II: ACCEPTED PRACTICES

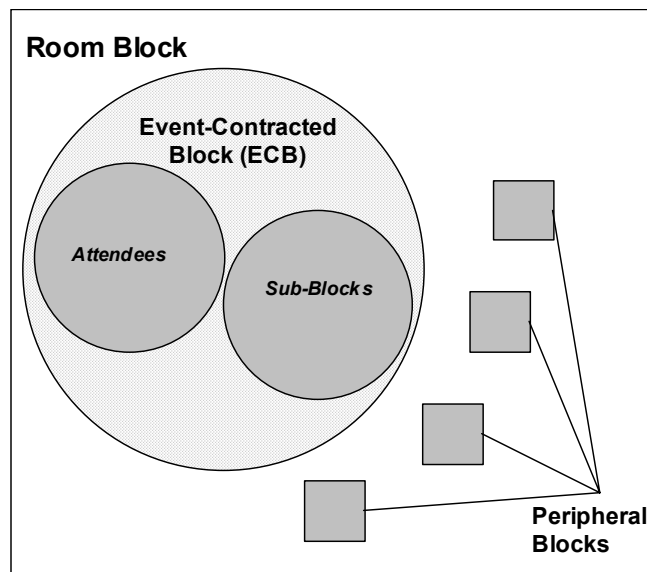
## A. Room Blocks

### 1. Definitions

- a. Room Block: Total number of sleeping rooms that are utilized and attributable to one event.
- b. Event-Contracted Block (ECB): The rooms that are contracted for by an event organizer with a housing facility(s) for a particular event (the Main Event).
- c. Sub-Block: Any group of rooms that is classified or separated differently than the general attendee block within the Event-Contracted Block (ECB).
- d. Peripheral Block: A group of rooms that is reserved by a party outside of the ECB but is present in the city as a result of the Main Event (for example, some exhibitors, some international tour groups).
  - A Peripheral Block's consumed room nights should be credited to the Main Event's total room nights for historical tracking purposes.
  - A Peripheral Block may be used to help offset attrition charges against the ECB.
  - A Peripheral Block usually negotiates its own terms (for example, 1/50, staff rate, etc.).

How do you identify Peripheral Blocks? Event organizers should require each contracted housing facility to report (to the event organizer) what groups are in-house at the same time as the Main Event. Each housing facility should include tour and travel, and wholesalers' reservations which were booked individually over the dates of the Main Event.

- e. Diagram of Block Structure



### 2. Managing Room Blocks

- a. Housing Facility/Event Communication
  - Conduct pre-event meetings in advance of opening housing with the contracted facility(s) to ensure understanding of and support for established housing procedures. Use these meetings to build relationships and promote the event organizer's support of the facility through its housing policies.

- b. Opening Housing Early
- (1) Keep in mind the nature of the event and its attendees when setting the opening date for accepting housing reservations.
  - (2) Make housing available early to capture the sub-blocks that want to make housing arrangements well in advance of the event. Without this alternative, sub-blocks might book directly with housing facilities. Make the process easy and convenient for sub-block contacts.
  - (3) For annual events, offer sub-blocks the opportunity to make future housing requests on-site at the current year's event.
- c. Deposits
- (1) A system of guarantees and, if necessary, deposits, (for example, a first-night deposit) may be required to reserve rooms. *See also Part II, Section B-1.*
  - (2) If deposit (or other) policies are stricter for sub-blocks than for general attendees, the event organizer can provide some benefit or additional service to the sub-block in order to offset and justify the additional restriction.
- d. Cancellation Policies
- (1) For cancellations made after the contracted cut-off date, deposits may be non-refundable or guarantees forfeited.
  - (2) Any non-refundable deposits that are collected should be credited to the event organizer's room block when determining actual pick-up, and to offset attrition liabilities, if applicable. The total deposit amount divided by the group room rate equals the number of rooms nights to be credited.
- e. Linking Housing and Registration
- If housing and registration are handled by separate entities, connect them using technology as much as possible. For example, link housing and registration websites and pre-populate an event attendee's data from one site to the other to create a seamless effect (for example, have a link so that an attendee has to enter name, address, telephone number, etc. only once). This can:
- Allow for easier comparison of housing and registration data.
  - Make it easier to identify people who have registered but not booked housing (and vice versa).
  - Require important data fields to be completed (for example, where attendees are staying).
  - Make the registration and housing processes easier for attendees by reducing required typing.
  - Be used to identify people who register, but do not go onto the official housing website. This can facilitate communications encouraging the use of the official room block.
- f. Giving Sub-Blocks On-Line Rooms Management Access
- Allowing individual sub-blocks to manage their rooms via secure Internet access can:
- Give sub-blocks more control over their rooms.
  - Give sub-blocks the ability to make reservations, changes and cancellations on-line.
  - Allocate inventory to the sub-block and provide secure access.
  - Eliminate the "middleman" and potential errors.
- g. Allowing Sub-Blocks to Contract Directly with a Housing Facility
- (1) Consider allowing sub-blocks the option of booking rooms directly with the housing facility, but require that the housing facility report this activity to the event organizer and/or housing bureau.
  - (2) Specify in housing facility contracts that the facility should report the sub-block pick-up figures to the event organizer and/or housing bureau.
- h. Managing Peripheral Blocks
- (1) Through the event registration process, require that all Peripheral Blocks provide information about where they have housing reservations. This is important because Peripheral Block information can be useful if attrition becomes an issue. Additionally, Peripheral Block pick-up may be important to overall room block performance relative to the cost of convention center use, subsidies, etc.

- (2) Consider specifying in housing facility contracts that peripheral block reservations taken over and above the ECB must be counted toward the ECB pick-up if there is any attrition liability to the event organizer at that housing facility.

i. Contracting

- (1) Event organizers should block and contract for rooms accurately, based on room block history.
- (2) Include verbiage in housing facility contracts regarding reservations taken directly through the housing facility. Sample verbiage is:  
*Hotel will not book organization affiliate or attendee housing directly, but will refer those requests to the Official Housing Bureau. If an affiliate or attendee has booked housing directly with the Hotel, appropriate credit for that assignment will be given to the event organizer as if it were part of the event contracted block, or an extension of that block, if the block is eventually filled.*
- (3) Include verbiage in housing facility contracts regarding rooms audits. An audit should compare the attendee registration list with the housing reservation list in order to identify attendees that went around the block. These should count in the final pick-up number reported. See also *Tracking Sub-Blocks in Part II, Section A-3*.
- (4) Include verbiage in housing facility contracts to specify pre- and post-event block requests such as "group room rates to apply 3 days prior and 3 days following the contracted event dates based upon group block availability."
- (5) Include verbiage in housing facility contracts that clearly specifies procedures for the booking of hospitality suites, and the event organizer's role in disallowing or approving such bookings.
- (6) Include verbiage in housing facility contracts that addresses whether individual deposits are refunded in the event the organization cancels.
- (7) Specify in housing facility contracts whether or not reservations taken over and above the ECB must be counted toward the ECB pick-up if there is any attrition liability to the event organizer at that housing facility.
- (8) Event organizers should provide a list of readily identifiable sub-blocks to each contracted housing facility.
- (9) Allow the review and adjustment of room blocks at designated benchmark dates in long-term contracts.

j. Continued Service After Cut-Off Date

At the official cut-off date (for example, 45-, 30-, or 21-days), rooms remaining in unused inventory should be returned to the housing facility for re-sale.

- (1) The housing facility and the event organizer and/or housing bureau should manage the remaining rooms in the ECB, processing and assigning reservations within the existing room block, based on rate availability. This should be done in order to provide service and track pick-up. This will include all changes, substitutions, cancellations and new reservations.
- (2) Any new reservations, cancellations, changes or substitutions for an event that are inadvertently accepted by a contracted housing facility, should be assigned/credited to the official ECB based on availability.
- (3) If possible, establish a wait list in order to fulfill room requests after cut-off.

k. Education & Marketing

Event organizers should make event attendees aware and knowledgeable of the housing process and the official, contracted housing facility(s). With knowledge, attendees may be more likely to book within the room block. Communication is key to success in this area and some recommended actions follow:

- Inform attendees that the event organizer has contractual obligations with specific housing facilities. Advise them that the organizer and its attendees have an obligation to fill the room block. Failure to do so may result in financial liabilities. Direct them to book through the official housing channels. This can be communicated in the promotional brochure, through correspondence accompanying housing forms and exhibitor manuals, and on event-related websites.
- Educate sub-blocks and individual attendees of the importance of providing accurate information about where they are staying during the event. The information is often needed in the event of an emergency, and to plan for shuttle transportation. Inaccurate shuttle estimates result in delayed transit and poor service levels.

- Inform attendees, along with sub-block and peripheral block contacts, that if they do not book in the ECB, the event organizer is less able to assist them should they need help with any housing issues. This can be communicated through correspondence accompanying housing forms and exhibitor manuals, and on any event-related websites. See additional information on incentives in Part II, Section A-2-I.
- Involve members, exhibitor advisory boards, etc. in supporting and encouraging booking within the ECB.
- Develop an exhibitor, or sub-block, focus group to identify concerns regarding established housing procedures, to develop solutions to those concerns, and incentives to book within the overall room block.
- Conduct surveys of individuals as well as sub-block and peripheral block contacts to determine where they have reserved accommodations, how they made their reservations, and, if they went around the block, the reasons for doing so.
  - Surveys may be done on-site at event registration or by email soon after the event concludes.
  - If the event organizer provides on-site Internet access for attendees, the completion of a housing survey could be required in order to gain access to that service.
- Encourage individuals and sub-blocks to use established housing procedures through:
  - Email – Send email notices to sub-block contacts leading up to the event.
    - Provide a direct link to the official housing and registration website(s).
    - Announce the opening of housing.
    - Contact individuals and sub-blocks that have registered and have not yet booked rooms.
    - Promote the event by targeting past sub-block contacts.
  - Telemarketing Prior to the Opening of Housing – Make phone calls to key sub-block and peripheral block contacts that have a history of booking outside of the block.
  - Telemarketing During Housing – Once housing has been open for a period of time, contact sub-blocks that have not yet made accommodations reservations within the block. Encourage them to make their reservations via the official housing procedures. If they have made reservations outside of the block, ask them the reasons for doing so, and where they have reserved accommodations.

#### I. Incentives to Book within the Block

Incentives can be offered to encourage attendees as well as sub-blocks and peripheral blocks to make reservations within the ECB. Some *recommended* incentives are:

- Offer a special “early-bird” rate. Consider negotiating an early-bird rate in the event contract (for example, rooms booked and pre-paid 60 days prior to the event will have a lower rate than all other rooms in the ECB). A discounted rate on housing and/or registration can be implemented to attract attendees and sub-blocks into the ECB and encourage them to book early.
- Offer sub-blocks complimentary rooms/suites and/or upgrades that would otherwise go to the main event organizer.
- Give sub-block contacts a free event registration, or discounted registration rate, for booking through the official housing procedures.
- Offer “value adds” (for example, free breakfast, complimentary fitness center access) for early-bird housing, or for anyone who books through the official housing procedures at any time.
- Provide positive incentives for sub-block pickup (for example, higher housing priority points for picking up a high percentage of the sub-block). Provide a post-event sub-block pick-up report so that sub-block contacts know their blocking activity is accurate and is being monitored by the event organizer.
- Require participation in the ECB in order to have access to shuttle transportation. This will help the event organizer gain control over room block pick-up and manage shuttle arrangements and costs.
  - Require peripheral blocks to pay a fee to the event organizer in order to use shuttle service. This may be effectively monitored through registration.
  - Provide a special badge or shuttle pass to the attendees who book within the ECB.

### 3. Tracking Sub-Blocks

- a. Avoiding Over-Blocking Sub-Blocks
  - (1) To avoid over-blocking and the resulting wash, room utilization by sub-blocks of 20 or more rooms should be tracked from year to year. Identify sub-blocks on the rooming list so that the housing facility can track actual pick-up figures.
  - (2) Actual pick-up figures should be used for future reference in allocating rooms to sub-blocks. Requests for rooms exceeding 10% over the prior year's pick-up should be thoroughly reviewed. The decision to grant or withhold approval should be made after consultation with the sub-block's contact, and take into account any special needs unique to the current year event (for example, an exhibitor launching a new product).
- b. Identifying Sub-Blocks
  - (1) When different policies are established for sub-blocks than for individual attendees, some sub-blocks may choose to book as individuals to avoid the policies. To stay informed of sub-block activity, monitor the registration lists by sorting the registrants by company, address, or credit card number rather than by individual name. It can help identify this type of booking activity.
  - (2) Clearly state in all housing materials that if such activity is identified, the offending group will be contacted and will be required to follow official housing policies for sub-blocks.

## B. Technology & the Internet

### 1. Credit Card and Deposit Guarantees

- a. Due to demand, location, requirements of events, policies of housing facilities, and the preferences of attendees, different methods should be allowed to guarantee housing reservations in a room block.
- b. It is important to communicate all options and policies with all parties (for example, event organizer, housing bureau, attendee, hotel) involved in the housing process.
- c. Policies regarding deposits and guarantees should be stipulated and mutually agreed upon within room block agreements or contracts and a process to communicate any changes to these policies should be in place.
- d. Systems and processes in exchanging commerce between all parties must be secure and comply with the latest standards of personal data encryption (for example, Visa CISP Program [http://usa.visa.com/business/accepting\\_visas\\_ops\\_risk\\_management/cisp.html](http://usa.visa.com/business/accepting_visas_ops_risk_management/cisp.html) ).
- e. In the event that a rooming list is processed with credit card data, there must be a secure and encrypted method of transferring valid data between parties. *Note: Please refer to your Housing Bureau or an Information Technology professional to ensure you are adhering to the latest data encryption standards.*
- f. The following are accepted methods by which a reservation for a group block can be properly guaranteed:
  - (1) Credit Card – This is the most common form of guaranteeing a reservation and is widely accepted by housing facilities. It is an accepted practice to utilize the latest technology to authenticate credit cards (for example, Verisign) prior to securely communicating this data from one party to another. (For example, make sure credit cards are not expired.)
  - (2) Deposits – Based upon what is mutually arranged between all parties, there may be multiple and varying deposit requirements for an ECB and its sub-blocks. Common deposit scenarios are:
    - First Night's Room & Tax – This process collects the individual's first night's room rate and tax at the time of reservation. Based upon the established policy this deposit can be collected via a credit card, check, wire transfer, or direct billing. *See also "Direct Billing," Part II, Section B-1-3.*
    - First & Last Nights' Room & Tax – This process collects the individual's first and last nights' room rate and tax at the time of reservation. Based upon the established policy this deposit can be collected via a credit card, check, wire transfer, or direct billing. *See also "Direct Billing," Part II, Section B-1-3.* This type of deposit is often effective for events where individuals (or sub-blocks) tend to check out early. Note that housing facilities have their own early departure fee policies and it is important to review those policies during the agreement process.

- Full Deposit – This process calculates and processes payment on the room rate and tax for the entire reservation of an attendee. Though not widely used, this is the most aggressive type of guarantee.
- (3) Direct Billing – In the event that the credit of an individual, an organization, or a sub-block is pre-approved, an event organizer can guarantee a reservation and invoice for payment at a later date. Direct billing approval policies must be communicated and mutually agreed upon by all parties involved in the housing process (for example, event organizer, housing bureau, attendee, hotel).

## 2. Reservations Process

- a. Prior to an ECB opening for reservations, the event organizer and the housing facility should review and agree upon all aspects of the housing process, including, but not limited to:
- the housing reservations method;
  - reservation form and/or rooming list format;
  - flow pattern;
  - room types held;
  - additional fees such as energy surcharges and resort fees;
  - rooms audit process and any related costs; and,
  - deposit, confirmation, cancellation, and early departure policies.

Although some of these items may be addressed in the contract, corporate and organizational policies change and therefore warrant an additional review.

- b. All policy changes should be reconfirmed in writing.
- c. Each housing facility involved in an event should review all communications (for example, housing forms, on-line information) that mention the housing facility to ensure accuracy prior to the event organizer promoting the event. *See also Security, Part II, Section B-6.*

## 3. Communications

- a. If the event organizer or a designated housing bureau controls the housing process, the organizer or housing bureau should share preliminary pick-up information with the contracted housing facility(s). This information should be shared as reservations begin to materialize. For example, room pick-up should be shared at designated "benchmark" dates of 120 days, 90 days, 60 days and 45 days from the start of the event.
- b. Registration numbers, not names (due to privacy concerns), should be shared by the event organizer, if requested by a contracted housing facility.
- c. If the event organizer and/or housing bureau has the technological capability, real-time housing and registration data should be made available on-line to contracted housing facilities on a "view only" , "password-protected basis.
- d. If the housing facility controls the housing process, the event organizer should have access to real time reservations and room pick-up data, including names and confirmation numbers on a "view only," password-protected basis.

## 4. Rooms Audit

- a. The housing facility should credit all qualified reservations to the appropriate ECB regardless of the rate, package, or method booked. Recoding of such reservations is not essential; however, credit for these rooms to the ECB is necessary, particularly if attrition penalties will be assessed.
- b. A rooms audit may be conducted post- and/or pre-event by the housing facility and/or the event organizer, determined by prior agreement in the contract (including process and costs), to the satisfaction of the event organizer while preserving the privacy and confidentiality of each housing facility guest. Post-event audits are the most accurate; however, a pre-event audit can be helpful in room block management.

## 5. Post-Event Reports (PERs)

APEX accepted practices regarding post-event reports are final. Those guidelines should be referenced for complete details and are available at [www.conventionindustry.org](http://www.conventionindustry.org). Key points include:

- a. A report of the details and activities of an event is called a "Post-Event Report" or PER.
- b. A face-to-face post-event meeting should be scheduled between the primary event organizer and each venue and facility involved in an event. That meeting should occur immediately following the end of the event and should focus on an evaluation of the success of the event as well as the completion of the Post-Event Report.
- c. The primary event organizer for an event, in partnership with the event's suppliers, should complete all applicable sections of the report within 60 days of the end of that event. Once complete, the primary event organizer should file a copy of the report with each entity, venue or facility that was used for the event (for example, Convention & Visitors Bureau, Hotel, Conference Center, etc.). The event organizer should also file the report internally for future reference.

## 6. Security

The Secure Sockets Layer (SSL) protocol is a set of rules governing server authentication, client authentication, and encrypted communication between servers and clients. SSL is widely used on the Internet, especially for interactions that involve exchanging confidential information such as credit card numbers.

All e-commerce transactions should utilize an encrypted SSL connection. An SSL connection requires all information sent between a client (for example, event organizer and/or attendee) and a server (for example, housing system) to be encrypted by the sending software and decrypted by the receiving software, thus providing a high degree of confidentiality.

Confidentiality is important for both parties to any private transaction. In addition, all data sent over an encrypted SSL connection is protected with a mechanism for detecting tampering – that is, for automatically determining whether the data has been altered in transit.