

Better Building by Design Event Management RFP: Q&A

1. **Question: Would Efficiency Vermont/VEIC be willing to set up their own merchant account that we could connect to our registration system for collecting registration income? If yes, would crime insurance still be required by the bidder, and would it still be required to complete the information security form? It appears that the information security form applies mostly to how we protect your money but since we use Cvent and if we also use Efficiency Vermont's merchant account, that form would not really apply to us.**

Response: No, due to our current security structures and banking system policies Efficiency Vermont is unable to accommodate a merchant account at this time. Crime insurance and the Information Security Questionnaire remain requirements as described in the RFP.

2. **Question: What is the role of the Contractor in the "assessment of virtual, in-person, or hybrid conference format options"?**

Response: If requested by Efficiency Vermont the selected Contractor shall work with the Contract Manager and Conference Committee to identify and select a virtual platform that meets the needs of event participants (speakers, attendees, sponsors, and Efficiency Vermont staff). Support expected from the selected Contractor may include but not be limited to:

- 1) developing a list of necessary platform criteria;
- 2) researching platform options and collecting proposals;
- 3) participating in product demonstrations and trainings as needed; and
- 4) finalizing the selection of a platform and working with the Work Order Manager to execute a contract for the software as a service.

If a virtual or hybrid option is pursued, the Contractor may serve as the liaison between the platform company and Efficiency Vermont negotiating best pricing and package options, and coordinating implementation of tools, gauging functionality against expectations and needs, and coordinating invoice payments.

3. **Question: Can you provide some detail about what is envisioned for virtual and hybrid conference format options? For example, would you look to have a virtual option be interactive with live sessions that are streamed vs. content on demand?**

Response: Efficiency Vermont is open to recommendations for the best format to guarantee a positive experience for all users and to meet overall conference goals. One such goal when considering format is that regardless of conference format, virtual sessions will need to navigate continuing education credit approval successfully with format being of little to no hinderance on third party approval. Many of our attendees require professional education credits to maintain a variety of private certifications and publicly regulated licenses which have specific requirements for session delivery (i.e. track attendance, and potentially including a proficiency quiz among other criteria). It is necessary that our attendees can obtain these credits regardless of format in which the conference is delivered.

4. **Question: Is the Contractor expected to lead the marketing effort (e.g. providing marketing strategies and related services) or provide support to a person/team?**

Response: The selected Contractor is expected to provide support to Efficiency Vermont's copy, design and web development team to arrange for the development of content, design and production of conference printed and online materials. That said, the selected Contractor is expected to assist with distributing notifications for various stages of conference planning, including but not limited to, notice of call for proposals, stages of registration opening, sponsor/exhibitor brochure, etc. In these instances, the selected

Contractor is expected to develop draft messaging and imagery to provide professional and polished notices in digital and/or print media.

- 5. Question: Can you provide clarity for what is expected by way of project management – is the reference in the Scope of Work solely related to marketing services or to the overall management of the conference, including marketing services?**

Response: The selected Contractor shall develop and maintain a conference project management structure throughout the planning process, including marketing services. These services are expected as part of the overall contracted services to keep Conference Committee on track with tasks, roles, deadlines, and note blockers and anticipated or observed planning and coordinating trouble spots that need to be addressed.

- 6. Question: What kind of support from the Contractor is needed to recruit speakers?**

Response: The selected Contractor is expected to use the prospective guest speaker and presenter list as provided by the Efficiency Vermont Contract Manager to distribute solicitations and call for proposal notices. Additional outreach by phone or email may be needed to recruit and confirm speakers and presenters for the Conference, though that is not a primary role expected of the selected Contractor.

The selected Contractor is expected to serve as a key lead on development of an online abstract submission form for collecting presentation proposals and provide support to the program chair and committee with pulling reports, exporting submission data, building the presentation grid, and sending notifications or acceptance to speakers. The selected Contractor is also expected to provide support in the form of clear and concise details relating to registration fees and payment options, cancellation policy, and additional conference information or materials to support the speaker's participation, and other related tasks.

- 7. Question: If a respondent does not recruit exhibitors, sponsors and conference partners as part of its service offerings, is it a deal breaker for consideration to become the Contractor for the 2025-2027 Better Building by Design conference?**

Response: Efficiency Vermont staff will manage sponsor and exhibitor solicitation for the conference, and the selected Contractor is expected to manage registration, booth placement, event decoration needs relating to exhibitor experience, and serve as point of contact for ongoing communication.

- 8. Question: How many exhibitors, sponsors and conference partners are anticipated to participate in the conference?**

Response: Better Building by Design has featured between 60 and 65 sponsors and exhibitors at each of the past three conferences; we expect similar trends over the next three years. That said, interest in growing and we are seeing waitlists grow from groups that want to have a booth. Optimizing booth size and placement will be expected support from the selected Contractor as a means to increase revenues to offset conference expenses and increase diversity of vendors for attendees to visit.

- 9. Question: Do you anticipate contracting with an expo company to provide exhibition services?**

Response: For the past three years we have contracted with a full-service exposition contractor to set up and dismantle exhibit booth packages and registration area; they have also been responsible for various signage needs for the event. We plan on contracting with them again in 2025-2027. We expect our selected Contractor to engage in non-binding negotiations with the expo company to develop a contract, scope of work, and budget for the conference's decoration needs, which the selected Contractor will provide to

Efficiency Vermont for review, approval and execution.

10. Question: Will exhibits use tabletops or booths?

Response: Sponsors are offered booth options based on sponsor level, generally ranging between 8' x 8' and 10' x 20'. Tabletop options have been offered on the second floor near the majority of conference rooms in the venue that has historically been used for BBD.

11. Question: Does VEIC expect the detailed budget to include both the cost of services to be provided by the Contractor under the Scope of Work and conference expenses? If yes, is it a deal breaker for consideration to become the Contractor for the 2025-2027 Better Building by Design conference if conference expenses are not included in the detailed budget submitted with the proposal?

Response: The detailed budget should include only the cost of services to be provided by the Contractor. We encourage applicants responding to the RFP to include their major assumptions contributing to the budget calculations such as anticipated overall event costs especially when it relates to conference format. For example, the applicant may want to offer an estimated budget for in-person, as well as another budget if you're accounting for a virtual/hybrid event if costs are anticipated to have more than a de minimis difference in cost to execute successfully and with higher guarantee of positive experience.