



2025-2027 Better Building by Design Conference Event Planning & Management

RFP Release Date: 3/13/2024
Bidder Questions Due: 4/5/2024
Answers Posted: 4/12/2024
Proposals Due: 4/19/2024

Request for Proposal

Summary

Efficiency Vermont, a statewide Energy Efficiency Utility, is seeking proposals from professionals or organizations for event planning and management services for the 2025-2027 Better Building by Design conference. Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by **5 p.m. EDT on Friday April 19, 2024**. Efficiency Vermont will not accept responses submitted after **5 p.m. EDT**. Please submit your response electronically via e-mail to: afode@veic.org with **RFP Submittal for "BBD Event Planning and Management"** in the subject line.

VEIC will respond to individual questions regarding this RFP only as follows: VEIC will accept questions regarding requirements and scope of work up to **5 p.m. EDT Friday April 5th, 2024**, via e-mail only, to afode@veic.org with **"BBD Event Planning and Management Question" in the subject line**. When appropriate, please refer to the RFP page number and Section Heading for ease of navigation and response. Efficiency Vermont will post answers on the Efficiency Vermont website <https://www.veic.org/requests-for-proposals> no later than **Friday April 12th, 2024**. VEIC will not address questions submitted after **Friday April 5th, 2024**.

Background

Vermont Energy Investment Corporation

Vermont Energy Investment Corporation (VEIC) is a mission-driven, nonprofit organization dedicated to reducing the economic and environmental costs of energy use. It carries out its mission, in part, by designing and implementing innovative energy efficiency and renewable energy programs. Founded in 1986, VEIC is nationally and internationally recognized for

advancing energy efficiency, energy conservation, and renewable energy programs and projects across the United States, Canada, and Europe. VEIC employs 280 professionals and is headquartered in Winooski, Vermont. It has offices also in Washington, DC, and Ohio. For additional information, please see: VEIC Website: www.VEIC.org

VEIC is a **Just-labeled** organization, committing itself to corporate transparency on social justice and equity indicators. We've also adopted the **Social Vulnerability Index** across our entire organization to measure the impact our work has on underserved communities. With ongoing employee engagement in **social and energy justice principles**, justice and fairness are embedded in everything we do. We see opportunities everywhere to create new tools that can help us build the kind of company—and the kind of society—we want to see.

Efficiency Vermont

Launched January 1, 2000, Efficiency Vermont helps ratepayers reduce energy costs, strengthen the local economy, and protect the environment by making homes and business energy efficient. Efficiency Vermont provides technical assistance, rebates, and other financial incentives to help Vermont households, businesses and other institutions—such as K-12 schools—reduce their energy costs with energy-efficient equipment, lighting, and approaches to construction and major renovation. Efficiency Vermont partners extensively with contractors, suppliers, and retailers of efficient products and services throughout the state.

VEIC operates Efficiency Vermont under an Order of Appointment issued by the Vermont Public Service Board. For additional information, please see the Efficiency Vermont website: www.efficiencyvermont.com

Scope of Work and Schedule

RFP and Implementation Schedule

Table 1. Efficiency Vermont will attempt to adhere to the following schedule but reserves the right to adjust the below schedule as-needed.

RFP release	March 13, 2024
Bidders Questions Due	April 5, 2024
Answers posted	April 12, 2024
RFP responses due	April 19, 2024
Bidder selected	May 3, 2024
Contract negotiations and signature	May 31, 2024
Performance Period	July 1, 2024 to June 30, 2027

Performance Period and Location

Performance period is from July 2024 through June 2027. Conference planning will take place either virtually or at Efficiency Vermont offices at 20 Winooski Falls Way, 5th Floor, Winooski, VT 05404.

Scope of Work

Efficiency Vermont is seeking event planning and management services for the 2025, 2026 and 2027 Better Building by Design conference. The conference is the region's premier design and construction conference, which features interactive learning about building durability, efficiency, and value for both residential and commercial projects. Due to the Covid-19 pandemic, for the first time the 2021 conference was held virtually. The 2022 conference offered a modified hybrid format, and returned to an in-person only format for the 2023 conference. As the conference evolves to meet workforce need, adaptability to conference format should be anticipated and reflected in submitted proposals.

By submitting a response to this RFP, the Bidder acknowledges understanding and acceptance of this Scope of Work, and agrees to fulfill all of its terms in the event of a contract award. The Contractor will perform all of the services described in this Scope of Work, and provide all the deliverables specified below.

The Contractor will provide, at a minimum, the following services in support of the Better Building by Design Conference:

Event Planning and Management Services

- Pre-Conference Planning including assessment of virtual, in-person, or hybrid conference options
 - Serve as a member of the Coordinating Committee and attend all meetings by phone or in-person at Efficiency Vermont's main office in Winooski, VT;
 - Work collaboratively with VEIC's Contract Manager and members of the Coordinating Committee to develop plans and supporting materials as it relates to the Conference's schedule, agenda, and conference logistics including space planning and general flow;
 - Work collaboratively with VEIC's Contractor Manager and members of the Coordinating Committee to determine ways to reduce conference costs and identify efficiencies, where possible.
- Marketing Services and Project Management

- Contractor shall work with VEIC's Contract Manager to provide marketing, project management and production oversight services as it relates to all approved marketing materials supporting the Conference.
- Contractor shall work with VEIC's Contract Manager to review the list of all Conference marketing materials and deliverable timelines and oversee the timely and accurate production of all approved materials.
- Materials include and may not be limited to pre-conference postcard, sponsor brochure, email blasts (including call for presentations, attendee registration, and sponsor/exhibitor registration), Conference program, Continuing Education forms, event signage, and website updates
- Speaker Recruitment, Coordination, and General Support
 - Contractor shall assist VEIC's Contract Manager with recruiting, coordinating, and providing general support services to the estimated 75 or more guest speakers and conference presenters.
- Facility Planning and Management, provided conference is held in-person, or a combination of virtual and in-person,
 - Contractor shall work collaboratively with staff at selected hotel venue to plan and execute the Conference.
 - Work collaboratively with the hotel management and staff to develop and manage the Conference event plan.
- Virtual Platform Planning and Management, provided conference is held virtually, or combination of virtual and in-person,
 - Work with the Contract Manager to select virtual platform that meets the needs of event participants (speakers, attendees, sponsors and VEIC staff)
 - Develop virtual platform by serving as a liaison with virtual platform and VEIC.
 - Work collaboratively with the selected Platform vendor to develop and manage the Conference event plan.
- Decor Planning and Management
 - Contractor shall work with hotel conference decorator to create and execute a decoration plan

- Exhibitor, Sponsor, and Partner Recruitment, Planning and Management
 - The Contractor shall recruit, coordinate, and manage all activities in support of the Conference exhibitors, sponsors, and Conference partners
- Attendee Registration and Management
 - Contractor shall provide registration services for conference attendees including on-line registration, payment services and supporting tasks
- Financial Management
 - Contractor shall provide financial management and reporting services for the Conference.
 - Contractor shall negotiate with subcontractors for best services to meet conference needs at the most reasonable cost.
 - Contractor shall make recommendations to VEIC to adjust service requests to reduce expenses to optimize available funds for the highest value and impact needs.
- Post Conference Evaluation
 - The Contractor shall provide VEIC's Contract Manager with administrative support as it relates to the post conference evaluations and as it relates to Session evaluations, post-conference registration evaluation with attendees, and post-conference registration evaluation of sponsors and exhibitors.

Preparing and Delivering a Proposal

For ease and efficiency of review, Efficiency Vermont has specified the requirements for submitting a proposal to this RFP. Bidders must follow, and be responsive to, ALL requirements of this RFP. Proposals should be clear and concise, presented in the form of a written response with sections and sub-headings. Proposals that are not in the required format or are incomplete may be disqualified at Efficiency Vermont's sole discretion.

Bidders are required to propose, and will be scored upon, the individual criteria summarized in Table 2. **Every bidder is required to include a Bid Summary Table based on Table 2** below with the specific value or information they propose for each of the listed criteria. The Bid Summary Table shall be presented as part of the narrative summary.

Table 2: Response Summary, Evaluation Criteria and Points

Scoring Category/Criteria	Max Points
Responsiveness to RFP	20
Qualifications and experience in type of work	25
Cost of services	25
Vermont-based organization or individual	15
Completed Contract Compliance document	15
TOTAL POINTS AVAILABLE	
100	

Response Requirements

- A. **Company Info:** Name of the business, contact person, and contact information including full legal name, address, telephone, mobile telephone number, e-mail address, and website address, as applicable.
- B. **Company profile:** a brief company profile, not exceeding 500 words, including any subcontractors.
- C. **Statement of ownership:** the type of business entity (sole proprietorship, corporation, LLC, or other), and state of organization.
- D. **Narrative and Bid Summary Table:** A narrative outlining the bidder's approach to the Scope of Work, addressing the specific tasks. Please include proposed values or summary information for each of the scoring criteria listed in Table 2 above. (The values that the bidders provide in the bid summary table are its proposed values, which will not be binding on Efficiency Vermont. Efficiency Vermont in its sole discretion will determine the final values to be awarded to each bidder.)
- E. **Binding Transmittal Letter** (1 page maximum): Each proposal must include a binding transmittal letter signed by a party authorized to obligate the bidder to the services described in their proposal. The letter must clearly identify the person authorized to serve as the organization's representative for future communications regarding the response. **The letter must state that the proposal is valid for 60 days.**
- F. **Budget** (5 pages maximum): Each proposal must include a detailed budget. The budget for the Scope of Work shall not exceed fifty-five thousand dollars (\$55,000) per conference and will be based on time and materials. Bidders should include hourly labor rates in the proposal. Bidder must include in their proposal a description of any assumptions made regarding the Scope of Work that may have an impact on the budget. Labor rates may be attached as a separate appendix.

G. Qualifications and Team Experience: This section of the response must demonstrate the bidder’s team’s (including any subcontractors) knowledge, experience, and ability to successfully complete the Scope of Work. Bidder should include description of direct event planning and management services, including virtual and in-person event management as well as areas of expertise and industry experience and other pertinent qualifications. Resumes may be attached as a separate appendix.

H. Proposal Exceptions Summary Form. A Proposal Exception Summary Form (see below) with exceptions to items in any section of this RFP or to Efficiency Vermont’s Standard Contract terms and conditions (Appendix A). Failure to note exceptions on the Proposal Exception Summary Form will be deemed to be acceptance of the terms of this RFP and Efficiency Vermont’s Standard Contract terms and conditions in Appendix A. Efficiency Vermont will take these exceptions into consideration when evaluating responses. If exceptions are not noted in bidder’s proposal but raised during contract negotiations, Efficiency Vermont reserves the right to cancel the negotiations and award the project to other bidders. If Bidder would like to propose their contract template, a copy of the template should be attached as an appendix.

RFP/ Contract Reference	Bidder’s Proposal Reference	Brief Explanation of Exception
(Reference specific outline point to which exception is taken)	(Page, section, items in bidder’s proposal where exception is explained)	(Short description of requested exception)
1.		
2.		

I. Certificate of Insurance. Bidder must supply a current Certificate of Insurance showing evidence of General Liability. If awarded a Contract, bidder will also be required to provide a final certificate of insurance to show compliance with the minimum insurance requirements outlined in the successful bidder’s contract. Efficiency Vermont anticipates the minimum requirements to be as outlined below but will confirm final insurance requirements prior to issuance of a contract. The final certificate of insurance shall comply with the requirements outlined in Efficiency Vermont’s Standard Contract (**Appendix A**). Bidder must raise any questions about the insurance requirements by the

Questions & Answers deadline set forth above and must identify any exceptions to the anticipated minimum requirements in its response.

Insurance Policies	Limits
Commercial General Liability	\$1m per occurrence/\$2m aggregate
Automotive Liability	\$1m per occurrence single limit for bodily injuries and property damage
Crime Insurance	\$1m per occurrence for dishonest acts of Subcontractor's employees which result in a loss to the District or VEIC.
Workers' Compensation	Statutory mandates
Employer's Liability	\$500k per accident; \$500k per disease; \$500k policy disease limit
Cyber Liability Insurance	\$1m per occurrence/\$1m aggregate
Umbrella or Excess Liability Insurance	\$3m per occurrence/\$3m aggregate (subcontracts under \$100k will only be required to have \$1m/\$1m)

- J. Disclosure of any pertinent litigation
- K. A bidder must disclose any past or pending judgments, lawsuits, actions, bankruptcies or regulatory decisions or information that may adversely affect the bidder's ability to meet any requirements of this RFP, the subcontract or the bidder's proposal. A bidder agrees to provide a detailed description of any of the above events and the applicable case number in its proposal.
- L. This disclosure obligation is an on-going material obligation that applies from the date of proposal submission through the expiration of any resulting subcontract award. Failure to disclose pertinent litigation may result in the disqualification of Bidder's proposal.
- M. **Information Security Requirements:** Please review the Information Security Requirements listed in Appendix B and provide a complete Information Security Questionnaire (available at this [LINK](#)) no later than the RFP response due date listed above. Efficiency Vermont will not consider any exceptions or requests to negotiate

terms that were not called out as exceptions to the security requirements in the RFP response.

Limitation

This RFP does not commit Efficiency Vermont to award a contract or to pay any costs incurred in the preparation or submission of proposals. Efficiency Vermont reserves the right to reject any or all proposals received in response to this RFP, to negotiate with any qualified bidder or to cancel in part or in its entirety the RFP, if any of these actions is deemed by Efficiency Vermont in its sole discretion to be in Efficiency Vermont's best interest.