



## **Request for Proposal**

### **Project Management and Consulting Services**

**RFP Release Date: February 8, 2021**  
**Bidder Questions Due: February 12, 2021**  
**Answers Posted: February 17, 2021**  
**Proposals Due: February 24, 2021**

### **Summary**

Efficiency Vermont, the statewide Energy Efficiency Utility, is seeking proposals for event planning and management services for the 2022-2024 Better Buildings by Design conference. Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by February 24, 2021 by 5:00 p.m. EDT. VEIC will not accept responses submitted after 5:00 p.m. EDT. Please submit your response electronically via e-mail to: Sharon Bay, sbay@veic.org with RFP Submittal for Event Planning and Management in the subject line.

### **Scope of Work**

Efficiency Vermont is seeking event planning and management services for the 2022, 2023 and 2024 Better Buildings 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. Prior to the 2021 conference, the conference was held in person with over 800 attendees, sponsors and presenters.

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.

### **Performance Period and Location**

Performance period is from March 2021 through March 2024. Conference planning will take place at either virtually or at Efficiency Vermont offices at 20 Winooski Falls Way, 5<sup>th</sup> Floor, Winooski, VT 05404.

The Contractor will provide, at a minimum, the following services in support of the Better Buildings 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.
  - The 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 seventy-five 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.
- 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

## Schedule / Milestones

RFP release	February 8, 2021
Bidders Questions Due	February 12, 2021
Answers posted	February 17, 2021
RFP responses due to Efficiency Vermont	February 24, 2021
Selection review period ends	March 1, 2021
Selection and contract negotiations	March 12, 2021
Performance period begins	March 15, 2021
Project close-out	March 31, 2024

## Proposal Requirements

Proposals should be submitted electronically via email to Sharon Bay ([sbay@veic.org](mailto:sbay@veic.org)) and should follow these standards: 1-inch margins all around; 11-point or larger font size; use of a standard sans-serif font such as Calibri, Arial, or Helvetica, with normal spacing; total length not to exceed 10 pages, exclusive of Appendices.

- Narrative Proposal
  - Bidder should include a narrative outlining their approach to the Scope of Work for the Event Planning and Management services, addressing the specific tasks.



- Experience and Qualifications  
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 as well as other pertinent qualifications.
- Budget  
The budget for the Scope of Work is not to 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.
- Appendices  
Include resume(s), labor rate and other relevant bidder information

### Evaluation Criteria

The Evaluation Team will be comprised of representatives of the Project Management Office, Programs and Implementation department, and the Operations Management Team. The Evaluation team will consider the following criteria:

• Responsiveness to RFP	20
• Qualifications and experience in type of work	25
• Cost of services	25
• Vermont based organization/individual	15
• Completed Contract Compliance document	15
<b>Total points available</b>	<b>(100)</b>

### Limitation

This RFP does not commit VEIC to award a contract or to pay any costs incurred in the preparation or submission of proposals. VEIC 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 VEIC in its sole discretion to be in VEIC's best interest.

### Insurance Requirements

Before commencing work, the Contractor shall provide Certificates of Insurance to show that the following minimum coverages are in effect. If the bidder cannot meet the minimum coverages, indicate the coverages that are and are not attainable. Where applicable the Certificates of Insurance shall name VEIC as an Additionally Insured party. All policies shall be non-cancelable without 30 days' prior written



notice from the insurance carrier to VEIC. It is the responsibility of the Contractor to maintain current Certificates of Insurance on file with VEIC throughout the term of this Contract.

Workers' Compensation: With respect to all operations performed under this Contract, the Contractor shall carry, if applicable, workers' compensation insurance in accordance with the laws of the State and any other state in which it is performing the Contract Scope of Work.

General Liability and Property Insurance: With respect to all operations performed under this Contract, the Contractor shall carry general liability insurance having all major divisions of coverage including, but not limited to:

- Premises – Operations
- Independent Contractors' Protective
- Products and Completed Operations (where appropriate)
- Personal Injury Liability
- Contractual Liability

The policy shall be on an occurrence form and limits shall not be less than:

- \$1,000,000 per Occurrence
- \$1,000,000 General Aggregate
- \$1,000,000 Products / Completed Products Aggregate (where appropriate)
- \$50,000 Fire Legal Liability

Automotive Liability: The Contractor shall carry automotive liability insurance covering all motor vehicles, no matter the ownership status, used in connection with this Contract. Limits of coverage shall not be less the amount required by any applicable state law.



CERTIFICATE OF AGREEMENT AND COMPLIANCE

This form must be completed in its entirety and submitted along with the Bidder’s response to the RFP.

CONTRACT TERMS (please check appropriate box below):

The undersigned hereby acknowledges and agrees to the language and attachments of the VEIC Contract template as part of this RFP

OR

The undersigned identifies areas of conflict with the standard contract as presented and has provided a list of exceptions taken, each referenced by section and page number of the standard contract, as part of their response.

**INSURANCE:** Bidder certifies that the company / individual is in compliance with, or is prepared to comply with, the insurance requirements as detailed in this RFP and the standard contract. Certificates of Insurance must be provided prior to issuance of a contract.

Company Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_

City, State, ZIP Code: \_\_\_\_\_

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

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date



## **Vermont Energy Investment Corporation**

VEIC is a sustainable energy company on a mission to generate the energy solutions the world needs. For over 30 years VEIC has been working with governments, utilities, foundations and businesses across North America to develop and deploy clean energy services that provide immediate and lasting change. With expertise in energy efficiency, building and transportation electrification, and new approaches for a clean and flexible grid, VEIC brings innovative solutions to the market. VEIC is nationally recognized for developing pilots and programs that optimize energy use, reduce energy burdens for low-income customers, and advance new technologies. In addition to our full-service consulting business, VEIC administers three large-scale sustainable energy programs: Efficiency Vermont, Efficiency Smart, and the DC Sustainable Energy Utility (DCSEU). [veic.org](http://veic.org).

## **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.veic.org/efficiencyvermont.com](http://www.veic.org/efficiencyvermont.com)