EI00251~2023RFP EVENT MANAGEMENT

SCOPE DOCUMENT

RESPONSE DUE DATE – WEDNESDAY, AUGUST 23, 2023 (1 PM ET)
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1. General Overview

1.1 Project Overview and Objectives

E&I Cooperative Services, Inc. ("E&I") is requesting proposals for Event Management to result in a contracting solution for use by its Members. E&I is committed to utilizing purchasing and business practices in accordance with the National Association of Educational Procurement Code of Ethics.

The primary goals and objectives of E&I are to:
(1) assist our Members to obtain the absolute lowest cost and best value that exceeds other public sector consortia agreements,
(2) establish a strategic sourcing partnership with any selected manufacturer(s) and authorized dealers, and
(3) enhance our position as the premier Procurement Cooperative for Education.


2.1 RFP Deadline

E&I will accept proposals submitted in response to this RFP only on the Jaggaer tool until 1:00 PM EST, on August 23, 2023 (the “Submittal Deadline”). The timeline for the RFP can be found in Section 2.2.

2.2 Tentative Schedule of Key Events

The following is a tentative schedule of events for this RFP:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Planned Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Proposal issued (“Open Date”)</td>
<td>07/24/2023</td>
</tr>
<tr>
<td><strong>5 PM ET Deadline</strong> for submission of RFP–related written questions (“Q&amp;A Submission Close Date”)</td>
<td>08/14/2023</td>
</tr>
<tr>
<td>E&amp;I Response to RFP–related questions</td>
<td>08/15/2023</td>
</tr>
<tr>
<td><strong>1 PM ET Deadline for Receipt of Proposals (“Close Date”)</strong></td>
<td>08/23/2023</td>
</tr>
<tr>
<td>Evaluation and Supplier Clarifications Begin</td>
<td>08/24/2023</td>
</tr>
<tr>
<td>Negotiations Begin with Shortlisted Suppliers</td>
<td>09/26/2023</td>
</tr>
<tr>
<td>Anticipated Award(s)</td>
<td>10/18/2023</td>
</tr>
<tr>
<td>Acceptance and Execution of Agreement</td>
<td>11/01/2023</td>
</tr>
<tr>
<td>Implementation</td>
<td>11/08/2023</td>
</tr>
</tbody>
</table>

2.3 Evaluation Process and Criteria

Any contract(s) resulting from this Request for Proposal will be awarded in writing to responsive and responsible Respondents whose proposal, in the opinion of the evaluation team, offers the greatest benefit to our members when considering the total value including the quality, service levels, customer service and total cost (including any trade, prompt payment discounts, and other miscellaneous charges).

All proposals should be complete to be considered responsive.

As part of the evaluation process, E&I may require a demonstration/presentation before the award is made and the demonstration/presentation may be considered as an additional factor in the award. In addition, E&I may decide to make site visits, as needed, during the evaluation process which shall be coordinated with the respective Respondent(s).

The RFP evaluation team will review and evaluate RFP responses according to the following weighted criteria based on a total of 100 points.
<table>
<thead>
<tr>
<th>No.</th>
<th>Criteria</th>
<th>Criteria Overview</th>
<th>Points</th>
</tr>
</thead>
</table>
| 1   | Contract Alignment & Connection | - Contract connection process to Member  
- Contract channeling to E&I (direct, net new, etc.) | 10     |
| 2   | Supplier Diversity           | - Certifications and Designations  
- Company Program and Overall Commitment to Supplier Diversity  
- Reporting, Metrics, & KPI’s | 10     |
| 3   | Supplier Capability          | - Company Experience  
- Service Capability  
- E-Procurement  
- Performance Tracking & Reporting  
- Quality Management  
- Training, Support & Account Management  
- Compliance | 20     |
| 4   | Economic Value and Financial Overview | - Contract Administrative and Marketing Fee (CAF)  
- Financial Offer Requirements & Proposal  
- Financial Reporting Capabilities | 25     |
| 5   | RFP Exceptions               | - Supplier Performance Expectations  
- Compliance with RFP specifications  
- Compliance with Master Agreement terms & conditions  
- Compliance with Members’ institutional policies, federal, state, and local legal and regulatory requirements and policies | 10     |
| 6   | E&I Risk Profile             | - RFP response quality  
- Litigation  
- Financial Health  
- GSA, State or GPO Existing Contracts | 10     |
| 7   | Scope Questions – Event Management | - Questions related to the scope of the RFP | 15     |

### 2.4 Sole Point of Contact for the RFP

**Stephanie Moore**  
Sourcing Manager  
Educational and Institutional Cooperative Services, Inc.  
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Respondents to this RFP or persons acting on their behalf shall not contact any E&I employee, officer, or agent; any E&I Board of Directors; or any E&I Member concerning any aspect of this RFP, except in writing to the Sole Point of Contact, from the date of release of this RFP through the official award date. Violation of this provision may be grounds for rejecting a proposal response. See Section 2.7 in the Cover Letter on how to submit questions.
3. Scope of Products and Services

E&I is seeking proposals from qualified, experienced, financially sound, and responsible Event Management providers for the delivery of comprehensive event management solutions for its members including but not limited to Event setup, Registration, Ticketing, Workflow management, Event marketing, Post event activities, Billing, Analytics and Reporting and Support. E&I desires the broadest possible selection of services being offered over the largest possible geographic area and to the largest possible cross-section of E&I’s current and future Members. The intent of this solicitation is to provide E&I Members with a comprehensive offering of services to meet their various needs. Respondents are not expected to be able to provide all of the scope areas for this RFP and may provide a response for one or more of the following scope areas at their discretion.

3.1 Event Management Software

3.1.1 Event Setup

- Comprehensive event planning and organization tools, including features for floor plan management, session scheduling, and logistical arrangements
- Customizable event templates and workflows to streamline the planning process and ensure consistency across different types of events
- Integration with event calendar and scheduling systems, allowing for seamless coordination, and avoiding conflicts with other events

3.1.2 Registration and Ticketing

- User-friendly online registration platform that allows attendees to easily register for events, select ticket types, and provide necessary information
- Secure payment processing and ticketing system to ensure smooth and reliable transactions
- Ability to generate and manage attendee lists and badges, facilitating efficient check-in processes on the day of the event
- Multilingual support to cater to diverse attendees, providing assistance and information in multiple languages

3.1.3 Workflow Management

- Streamlined communication channels for event stakeholders, including event organizers, staff, speakers, sponsors, and attendees
- Task assignment and tracking features, enabling efficient delegation, and monitoring of event-related tasks
- Set timelines for approvals and notifications related to the event date
- Collaboration tools, such as shared calendars and document repositories, for seamless coordination among team members and external stakeholders

3.1.4 Event Marketing

- Integrated marketing campaigns across various channels, including email marketing, social media, and online advertisements
- Targeted promotion strategies to reach the desired audience, with features for segmenting and personalizing marketing messages
- Analytics tools to measure marketing campaign effectiveness, providing insights into open rates, click-through rates, and conversion rates

3.1.5 Audience Engagement Tools

- Interactive polling and live Q&A features to encourage attendee participation and gather real-time feedback during sessions and presentations.
- Social media integration to enable attendees to share their event experiences, photos, and insights on popular social platforms.
- Gamification elements such as quizzes, challenges, and leaderboards to incentivize attendee engagement and reward participation

3.1.6 Post Event Activities

- Surveys and feedback collection mechanisms to gather attendee feedback and evaluate event satisfaction
• Post-event data analysis and reporting to measure event success, identify areas for improvement, and track return on investment
• Follow-up communication and attendee engagement tools to maintain relationships and nurture leads generated from the event

3.1.7 Billing
• Automated invoicing and payment tracking to streamline financial transactions and reduce administrative overhead
• Integration with accounting systems to ensure accurate financial reporting and seamless reconciliation of event-related expenses and revenues

3.1.8 Analytics and Reporting
• Comprehensive reporting on event performance, attendance, and engagement metrics, providing insights into registration numbers, attendee demographics, session popularity, and more
• Real-time data visualization and analytics dashboards to monitor event progress and make informed decisions
• Customizable reports tailored to specific event requirements, allowing for easy sharing of key insights with stakeholders

3.1.9 Support
• Dedicated support channels, including email, phone, and chat, to address event management queries and provide timely assistance
• Training resources and documentation for users and administrators to ensure a smooth onboarding process and maximize utilization of the Event Management solution
• Timely and effective technical assistance for troubleshooting issues and resolving any system-related challenges that may arise during event planning or execution

3.1.10 Mobile Event Apps
• Development and customization of mobile event applications that provide attendees with access to event schedules, speaker bios, interactive maps, and networking features
• Push notifications and alerts to keep attendees informed of important updates, schedule changes, or special announcements

3.1.11 Virtual and Hybrid Event Solutions
• Provision of virtual event platforms that enable hosting fully online or hybrid events combining in-person and virtual elements

3.1.12 Data Privacy and Security
• Robust data privacy and security measures to protect attendee information, payment details, and sensitive event data
• Compliance with relevant data protection regulations and industry standards, ensuring the confidentiality and integrity of event-related information

3.2 Value Added Services
We welcome any additional value-added services you may provide, including but not limited to Event Budgeting and Space Management, Virtual Speed Networking.

3.2.1 Space Management
• Comprehensive tools and features to efficiently allocate, track, and optimize physical spaces with the universities enabling efficient space utilization
• Centralized platform for scheduling and managing space reservations within the university ensuring efficient coordination
• Detailed reports on space utilization, occupancy patterns and overall facility performance to make informed decisions

3.2.2 Event Budgeting
• Provide tools for creation of budget categories, expense allocation and tracking of actuals costs vs planned budget
3.2.3 Virtual Speed Networking

- Enable students, faculty, and alumni to network and build connections remotely through a user-friendly virtual speed networking platform, fostering collaboration and career opportunities.

3.3 No Exclusions

No products, or services provided by your company have been excluded from this RFP. All products, supplies and accessories carried in a Respondent’s catalog(s), price book(s) or otherwise available by special order are part of this solicitation.

4. Pricing

Supplier must complete the ‘Pricing Sheet’ and upload it on the Jaggaer tool. The first tab ‘Instructions’ in the ‘Pricing Sheet’ lists out the different sections and pricing requested by E&I. Please ensure to review the ‘Instructions’ tab before you start filling in the pricing.

5. Appendix

5.1 Definitions

The following are the definitions of general terms used in this RFP.

**DAYS**: All days specified are based on calendar days unless otherwise noted.

**EDUCATION**: The combination of Higher Education and K-12.

**GO TO MARKET**: Strategy or action plan specifying how the Respondent will utilize its inside and outside resources (e.g. sales force and distributors, marketing initiatives, etc.) to deliver its products and/or services to the Education market through an E&I contract.

**Contract Region Key**  **States**

Northeast  CT, MA, ME, NH, NY, RI, VT
Mid-Atlantic DC, DE, MD, NJ, PA, VA, WV
Southeast  AL, FL, GA, KY, MS, NC, SC, TN
Central    AR, IA, KS, LA, MN, MO, ND, NE, OK, SD, TX
Great Lakes IL, IN, MI, OH, WI
Western    AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY

**GREATEST BENEFIT**: The decision for award will be based on an overall combination of variables such as quality, price and various elements of required service that in total are optimal relative to the needs of the E&I Membership.

**HIGHER EDUCATION**: All Universities, Colleges, Healthcare Facilities (private and public), i.e., Associate, Bachelor, Master, and/or PhD in the United States, that provide for advanced learning and/or grant degrees. These Universities, Colleges and Healthcare Facilities may or may not be members of E&I.

**HUBS**: Historically Underutilized Businesses e.g., minority, women-owned businesses (for the State of Texas, Certified HUBS within the State of Texas).

**K-12**: All School Systems and Districts (private and public) in the United States that provide education for students in Kindergarten through 12th Grade. These School Systems and Districts may or may not be members of E&I.

**MANUFACTURER**: Indicates an entity that makes the products from raw materials outlined in this RFP, all of its agents, and employees.

**MAY**: Indicates something that is not mandatory but permissible/desirable.

**MEMBERS**: Includes Institutions, Universities, Colleges (private and public) and K-12 schools that are listed in the E&I record.

**MONTH END**: Shall mean the last calendar day of each month.

**MOST RESPONSIBLE**: A Respondent whose reputation, past performance, and business and financial capabilities are such that the Respondent would be deemed most capable of satisfying Member needs for a specific contract.

**MUST, SHALL, WILL**: The words “shall,” “must,” or “will” are equivalent and indicate mandatory requirements or conditions. E&I will not waive Responder’s material deviation from any of the mandatory requirements.

**RMWBE**: Minority, Woman-owned Business Enterprises.
**NATIONAL AGREEMENT:** E&I awards an Agreement which is available throughout the United States (including Alaska and Hawaii).

**REGIONAL AGREEMENT:** E&I may elect to award an Agreement by Geographical Areas of the United States. See table below for geographic breakdown:

**RESPONDENT:** Entity who submits a proposal to an RFP.

**RESPONSIBLE:** A Respondent is responsible if they are capable or qualified to perform the work.

**RESPONSIVE:** A proposal is responsive if it meets all of the requirements of the RFP.

**SHALL, MUST, WILL:** Indicates a mandatory requirement(s) that must be addressed. Failure to address these mandatory requirements will result in rejection of your proposal as non-responsive. E&I may, but is not required to, reserve the right to request additional information.

**SHOULD:** Indicates something that is recommended but not mandatory. If the Respondent fails to provide recommended information, E&I may, at its sole option, ask the Respondent to provide the information or evaluate the proposal without the information.

**SOLE POINT OF CONTACT:** The Contract Manager or designee to whom Respondents shall address any questions regarding the solicitation or award process. The sole point of contact shall be the arbitrator of any dispute concerning performance of the Contract.

**SUCCESSFUL RESPONDENT:** The Respondent(s) or individual(s) who are the recommended recipient(s) of the award of a contract under this RFP (also synonymous with “Payee,” “Offeror,” “Contractor,” “Vendor,” and “Supplier”). If a Respondent is a manufacturer, its certified dealers and resellers may also furnish products under the Contract; in choosing to do so, the dealers and resellers agree to honor the Contract and the term “contractor” shall be deemed to refer to them. Unless awarded the Contract as a direct Respondent, however, dealers and resellers are not parties to the Contract, and the Respondent that certifies them shall be responsible for their actions and omissions.

**SUPPLIER:** Indicates an entity that distributes/furnishes the products and or services of a company, all of its agents, and employees. For the purposes of this RFP, the terms Supplier and Respondent may be used interchangeably.