



RICK SNYDER  
GOVERNOR

STATE OF MICHIGAN  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY  
LANSING

EARL J. POLESKI  
EXECUTIVE DIRECTOR

June 14, 2017

**Q/A for RFP: Conference and Event Planning Services**

1. What is the budget for each event?

*Future budgets, including 2017/2018 are currently undetermined and unresolved.*

2. Will there be a committee for each event? Or is it one committee for all 5 events?

*Yes, there will be 5 committees; however, each committee will be comprised of a permanent "core", including changing committee participants relative to each event. This will ensure consistency while simultaneously ensuring program specialists and partners, Authority and non-Authority participants alike, are actively engaged in the planning process for each event.*

3. What are the proposed dates for each event?

*Current schedules are as follows:*

- a. The BMCC is scheduled for April 30 – May 2, 2018.*
- b. The Asset Management Conference is scheduled for August, 2017; it is unlikely that the selected contractor will participate in planning for this event and instead, should look to contribute to planning for the 2018 event.*
- c. The Homeless Summit is scheduled for October 9-10, 2017; it is unlikely that the selected contractor will participate in planning for this event and instead, should look to contribute to planning for the 2018 event. 2018 venue has already been secured.*
- d. Archaeology Day is next scheduled for October 28, 2017; traditionally, Archaeology Day is held in October in part to celebrate International Archaeology Month.*
- e. All Staff Meetings are variable.*

4. Will one contractor be chosen for all five events or could it be multiple contracts chosen? Will one contractor be chosen for all five events or could it be multiple contracts chosen?

*The Authority anticipates awarding a single contract; however, the Authority reserves the right to make multiple awards.*

5. On page 7 of 25, under 5. Event Planning Logistics, s. "x. Development of keynote speaker session online;" Can you please clarify the meaning of this?



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*This refers to inclusion of a description of the keynote speakers, including a brief bio and a picture.*

6. On page 7 of 25, under 6. Speaker and Sponsor Support, “d. Establish and maintain an online session manager;” Can you please clarify the meaning of this?

*The Authority is seeking to implement submission of session proposals online (e.g., for BMCC, using the established the BMCC website). It is anticipated that the online portal and accompanying software could then allow for certain planning committee members to review and accept or deny proposed sessions.*

7. On page 8 of 25, under 6. Speaker and Sponsor Support, “h. Development of Sponsor PowerPoint Presentation for General Sessions including all project management, design, photo enhancement, and production layout.” Can you share more information on this assignment? How long is the video, or is it several videos one for each sponsor that play at different times during the conference?

*At the BMCC, sponsors were offered either 30 second or 90 second videos, depending upon the level of sponsorship. The number vary from year to year. These sponsorship opportunities may be changed for the 2018 conference and/or could be applied to the other conferences described in the RFP. The Authority is also considering other options for videography.*

8. On page 12 of 25, under H. Project Personnel, “Bids must acknowledge and identify project personnel who will be performing services pursuant to an awarded contract and (a) sign the contract on behalf of the selected contractor and/or (b) are listed in the form attached and incorporated into this RFP as Exhibit D.” I understand that if I plan to use a subcontractor for some of the work, I would identify, but does this mean I should list each of our 5 OSI employees as what their internal responsibilities will be? Or can I be general and say “OSI’s Registration Manager”, or “OSI’s Accountant”? Do I need to apply names?

*Please provide names and titles of employees who will provide services pursuant to an awarded contract.*

9. The RFP mentions the duration of the term of the contract. What will be the term of this contract? One year or multiple years?

*It is anticipated that a 3-year contract may be awarded.*

10. Where will each event be located within the state of Michigan? Where were they [Events] held?



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*Archaeology Day and Building Michigan Communities Conference will be held in Lansing, Michigan.*

*With offices located in both Lansing and Detroit, the Authority is open to change from its traditional approaches: (a) Homeless Summit has traditionally rotated around different regions of Michigan; (b) Asset Management has traditionally been held in Lansing, Michigan; and (c) All Staff meeting has traditionally been held in Lansing but currently considering a location between offices.*

11. What were the costs of each previously held event?

- a. Archeology Day. \$7500.*
- b. Asset Management Conference. \$50,000*
- c. Authority All-Staff Meeting. \$20,000.*
- d. Building Michigan Communities Conference. Past expenses average just over \$300,000, not counting the contract expenses for the event planner.*
- e. Homeless Summit. Past expenses average \$60,000, covered principally from conference revenue.*

12. What contractor was used previously?

*Event planning has been conducted in-house; however, Association Management Resources was used for the BMCC.*

13. How many volunteers/staff levels for each?

*Levels have varied according to the size of the event, the changing needs for the event, and the availability of the selected contractor's employees.*

14. Will all events be held in 2018?

*The Authority is currently developing its upcoming budget; while it is anticipated that each individual event will be held in 2018, the Authority reserves the right to modify its plan.*

15. What was the total revenue realized from each event?

*The Authority's goal is to ensure revenue neutral and has largely achieved this goal for its events.*

16. Are promotional items (e.g., ink pens, tote bags, mugs, etc.) desirable?



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*Yes, if the event budget allows.*

*Archaeology Day – Yes; in cooperation with the Michigan History Center/Michiganology product line if possible.*

*BMCC - the planning committee provides a tote bag or similar item. Other items are provided by the sponsors and exhibitors.*

*Homeless Summit – Yes; traditionally provided inexpensive tote bags.*

17. What percentage of attendees arrive within the first hour of the events?
- 25%
  - 50% *Archaeology Day*
  - 75%
  - 100% *All Staff Meeting*

*We have otherwise not collected this information for the remaining events.*

18. Please describe the general attendee flow into the conferences/events.

*Archaeology Day - typically has a steady flow through the first 5 hours of the 6-hour event; attendees come and go as they please.*

*All Staff Meeting – typically single arrival for a pre-determined start time includes the entirety of Authority employees (~350 employees).*

*Homeless Summit – last year's attendance was over 400.*

*Asset Management – last year's attendance was approximately 350.*

*We have otherwise not collected this information for the remaining events.*

19. Do you wish to collect signatures for attendee check-ins? Do you wish to collect signatures for attendee's session(s) check-ins?

*For the BMCC, session participants seeking continuing education credits are required to sign in at the beginning of the session, and then again at the end of the session. No other sign-ins are required for the BMCC.*

*Archaeology Day, Asset Management and Homeless Summit – Yes; for staff, exhibitors, speakers and volunteers (to ensure all have arrived, and for catering).*



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*All Staff – yes; traditionally this has been handled in-house using Outlook calendars.*

20. Do you wish to track attendance for breakout sessions/workshops?

*Yes. Attendance is tracked in a number of ways including distributed number of name tags, as well as looking in the breakout rooms during the sessions and counting the number of attendees.*

21. Do you wish to allow attendees into sessions for which they have not registered? Yes; (note, no session registration for Archaeology Day).

22. Will there be concurrent sessions that you wish to track attendance for? Yes.

23. How many concurrent sessions do you anticipate at each event?

*This will vary depending on the evolving size of the event, etc. Using the BMCC as an example, BMCC has had as many as 12 sessions at once. The planning committee is tentatively planning on no more than 10 sessions at once for the 2018 conference. Juxtaposed against the BMCC, Archaeology Day plans on 6-8 concurrent sessions.*

24. For the largest session how many doors need to be covered for attendance tracking?

*This will vary depending on size and complexity of the event, as well as the selected venue. For Archaeology Day, 2 entries to the Michigan History Center would need coverage; however, for the BMCC, we do session counts by someone walking by and looking in during the session. No one needs to cover any doors.*

25. Are you interested in offering a lead retrieval solution for exhibitors so they can scan badges, capture contact details and download collected leads in real time?

*Unanticipated at this time but open to solutions.*

26. Would you like to display social content in real time?

*Unanticipated at this time but open to displays.*

27. Will you share the list of interested potential bidders?

*The Authority follows the Michigan Freedom of Information Act, 1976 PA 442.*



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28. The RFP lists six different conference and events, but no dates or project timeline are provided. This information will be useful in preparing a schedule for delivery of services as required for the proposal.

Please provide the project start and end dates and the approximate dates of the six events. If any of the events have a confirmed date and venue, can those be provided? Do any of the events have a firm date and venue in place?

*Current scheduling is as provided below. Because of the need for advance planning, it is anticipated that the selected contractor will “phase” in to assist with planning upcoming events, growing with its involvement in events scheduled later in 2017 and beyond.*

*Archaeology Day – Michigan History Center, October 28, 2017; 10am - 4pm*

*Homeless Summit – Grand Traverse Resort & Spa, October, 2017; Ypsilanti, MI, October, 2018*

*Asset Management Conference – Lansing, August, 2017*

*BMCC – April 30 – May 2, 2018*

29. Is the RFP for just one round of the conferences and events (e.g., 2018 programs), or is it a multi-year project?

*It is anticipated that a 3-year contract may be awarded.*

30. The RFP states that a line item budget must be submitted with the proposal, identifying all expenses related to the work to be performed. With regard to supplies, materials and other direct costs, is it correct to assume that these are only those which the contractor would purchase to perform the services? Or, will the contractor need to include budget estimates for items such as conference printing, nametag supplies, audiovisual equipment, signs and credit card fees, etc.?

Note: Section 5, #l-m lists some of these items, so clarification of the budget expectations for the proposal is appreciated.

*Using the BMCC as a model, the line item budget should include those items which the contractor will purchase to perform the services. For example, the selected contractor will work with the BMCC planning committee to develop a conference budget that will include but not be limited to speaker fees, exhibit hall rental, printing, meals, parking, video production, scholarships, etc.*



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31. It appears that MSHDA currently has an external web site in place that would be updated and used for the events in this RFP, but not a current registration system. Is this correct?

*Not entirely. Ideally, conference events will have their own external websites, planned through a collaborative effort with a number of both Authority members and non-Authority partners. The Authority has otherwise been inconsistent with the use of state-available conference registration systems and those provided by external contractors and/or partners.*

Can the web site be used for all events? *Ideally.*

Assuming this is correct, would the contractor be responsible for updating and maintaining the current web site and creating a new registration system?

*Yes, the contractor would be responsible for updating and maintaining it, including registration.*

32. The RFP states that the contractor will “support the Authority’s communication staff in pre- and post-conference media relations....” Please clarify the MSHDA staff’s communications, public relations and media relations capabilities and their specific responsibilities.

*The Authority has staff dedicated to communications, public relations and media relations; the Authority is also under contract with an advertising service provider who may be involved in whole or in part.*

33. Will the contractor truly be considered “support” only for all or some of the conferences?

*Undetermined; however, it is anticipated that the selected contractor will be used to its full capability as dictated by the complexity of the event, planned attendance, and selected venue.*

34. What are the core activities the contractor will be involved with in terms of public relations?

*At a minimum, these will include event promotion, event-day(s) media coverage, attendee feedback.*

35. Are there instances in which the contractor will be the lead, with opportunities to establish collaborative working relationships with the MSHDA staff?



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*Yes; it is the Authority's goal to establish such relationships to ensure successful events.*

36. Is the same MSHDA staff responsible for all of the events with regard to public and media relations, or does it differ by event?

*It is anticipated that the same public and media relations staff will be involved in each event; however, the Authority does collaborate with non-Authority partners which could differ event-to-event.*

37. Are you able to share the public relations budgets for the conferences at this point, or not until after a contract is awarded?

*The Authority is currently finalizing its budget for 2018; previous event budget/cost information is provided above.*

38. What are the target audiences for these events, particularly geographically? Is there interest in promoting one or more of these events to national industry publications and markets?

*The Authority is interested in all promotional opportunities such as they align with each particular event, the complexity of the event, and planned attendance.*

*BMCC, Asset Management and Homeless Summit - the target audience includes the stakeholders involved in the broader affordable housing industry in Michigan and the effort to end homelessness. This includes but is not limited to nonprofit and for-profit housing developers, homeless shelter and service providers, homeownership counselors, lenders, tax credit syndicators, government representatives (local, state, and federal), trade associations, and consultants.*

*Archaeology Day – the target audience is as diverse as possible, including all age groups with an emphasis on Michigan 3<sup>rd</sup>-12<sup>th</sup> graders, as well as college students.*

39. Will MSHDA staff coordinate the production of any related television or web-based promotional and interview videos? What would the contractor's role be in these instances?

*The need will vary and is undetermined at this time. At the time of this RFP, Authority staff or subcontractor will likely participate in the production of videos; however, in the case of the BMCC, the selected contractor would be expected to, at a minimum, produce videos of award winners, and to work with the venue to assure the keynote speeches are video recorded.*





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40. To what extent do these events rely on social media? Is digital/social media communications handled by MSHDA staff, with opportunities for contractor input?

*For all events, this continues to evolve. The Authority is interested in leveraging all mainstream social medial platforms and will be a collaborative effort among the Planning Committee, the selected contractor, and as appropriate, any non-Authority partners. By way of example, the BMCC has an external website, a Facebook page, and a Twitter presence. At a minimum, BMCC will require the selected contractor to provide similar presence.*

41. Is on-site media relations support required for any or all of the conferences?

Yes.

42. Are the various planning committees for each event responsible for all of the program development, or is the contractor expected to also help identify potential speakers and topics?

*Currently, these are generally handled in-house. Moving forward, it is anticipated that the planning committees will assist in program development as needed. The selected contractor will assist to identify speakers and topics; however, it is likely that the planning committees will periodically rely on the selected contractor's expertise and recommendations to assist in identifying and securing potential speakers, etc.*

43. What type of continuing education credits are required for the various events? (This may impact the evaluation aspects of the project as certain accrediting bodies require a specific type of evaluation process.)

*These are variable from event-to-event; for example, whereas BMCC Continuing Education Credits were offered for planning, social work, realtors, and MSHDA Housing Counselors, none are offered at Archaeology Day.*

44. Please clarify the budget and process for expense scholarships? (Page 4, 1-i) Are these for staff, speakers, sponsors, etc., or are scholarships offered to qualifying participants of the events? How are the costs of the scholarships covered—as part of the budget, via fundraising, etc.?

*Collected information only applies to the BMCC where a limited number of scholarships were offered by the planning committee and was part of the budget. They were for qualifying participants. The budget is typically between \$6,000 and \$7,000.*



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*Homeless Summit offers complimentary registration for presenters and, in some cases, travel reimbursement which are included in the conference budget.*

45. What is the role of MSHDA staff and planning committee on-site? Do they attend primarily as emcees, moderators, on-site liaison to keynote speakers, etc., or are there other roles and if so, what are they?

*This varies from conference-to-conference depending on complexity of the event, attendance and need. The Authority desires to use its available staff to the greatest extent and effectiveness as possible. Examples include: (1) Archaeology Day, Homeless Summit and Asset Management are principally planned in-house and staffed by Authority employees; (2) for the BMCC, MSHDA staff and representatives of the other planning committee member organizations serve as panelists, moderators, and in some cases as volunteers. The selected contractor serves as the on-site liaison to keynote speakers.*

46. The RFP states that a separate bank account must be established for each event. Does this mean that six bank accounts must be established, or can one be created as long as income and expenses for each event are tracked?

*To ensure no comingling of funds, it is desirable to create and maintain individual accounts for each individual event.*

47. Will a MSHDA representative be a co-signer on the bank account(s)?

*No; it is anticipated that the selected contractor will serve as fiduciary on behalf of the Authority for all event finances.*

48. Does MSHDA fund any or all of the events with its own budget or are all of the public events turn-key? Does MSHDA expect the events to produce a profit?

*Expenses are covered by registration fees, sponsorships, exhibitors, and some MSHDA funds. Events are not expected to produce a profit, though the goal is to generate sufficient revenue to cover all costs associated with the individual event.*

49. Will you provide budget reports for past conferences and events to the selected contractor? Yes.

50. Do all of the events, except perhaps the All Staff Meeting, require sponsorship services?



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*If opportunities are available, the Authority will consider sponsorship services for all proposed events. The BMCC has sponsors and exhibitors.*

51. What type of sponsorship support has been provided for these events in the past? What percentage of the event budgets do sponsorships account for, i.e., are any or all of the events dependent on sponsorships to be viable?

*This information has not been collected for all events; For the BMCC, sponsorships average 41% of the revenue, and exhibitors' average 7% of the revenue.*

52. Are businesses who do not fall under the categories of veteran owned, women-owned, minority owned, and small businesses encouraged to submit a proposal?

*Any business authorized to conduct business in Michigan is encouraged to apply.*

53. What type of continuing educations credits will be provided for the Building MI Communities Conference?

*Continuing Education Credits were offered for planning, social work, realtors, and MSHDA Housing Counselors.*

54. Approximately how many meeting rooms will be utilized for the Asset Management Conference, All-Staff Meeting, Building MI Communities Conference and the Homeless Summit?

*The BMCC has traditionally been held at the Lansing Center, and typically uses the entire facility. One large room handles plenary sessions and meals, one large room handles the Exhibit Hall, and the other rooms are used for breakout sessions (historically up to 12 breakout rooms at a time, though for 2018 this may be limited to 10).*

*All Staff Meeting typically only requires one large, general session room.*

*Homeless Summit typically requires one large, general session room with 5-6 breakout rooms, as well as an additional storage room.*

*Asset Management typically requires one large, general session room including classroom-style tables with A/V equipment with a "head table" for panels and side tables for water, training materials, etc.*

55. Will there be exhibitors at the BMCC or the homeless summit? If so, approximately how many at each are anticipated?



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*For the 2017 BMCC, there were 27 exhibitors and 31 sponsors. The number varies year to year.*

*Homeless Summit typically has 3-5 exhibitors but varies from year-to-year.*

56. Can you provide the registration fees for each event that the attendees and exhibitors will be charged for each event? If registration fees have not been determined for 2018, can you provide the fees currently being charged or a best guess for what will be charged?

*Archaeology Day is provided free to the public. No registration fees are associated with All Staff.*

*For the BMCC, registration fees for 2018 have not yet been determined. For 2017 they were as follows:*

- a. One-day Early Bird \$115*
- b. One-day after Early Bird \$150*
- c. Three-day Early Bird \$195*
- d. Three-day after Early Bird \$245*
- e. Three-day full-time university student Early Bird \$120*
- f. Three-day full-time university student after Early Bird \$150*

*Homeless Summit – Ranged from \$130 - \$185 depending on date of registration.*

*Asset Management - \$200.*

*For the BMCC, exhibitor fees for 2018 have not yet been determined. For 2017 the general fee for a booth was \$750 by the early bird date, and \$1,000 after that. Planning committee members were charged \$500. Sponsors received a booth with their sponsorship package.*

*Homeless Summit exhibitors generally pay a small fee, excluding State of Michigan partners who are offered gratis.*

57. Can you provide how approximately how many attendees pay by check and how many pay by credit card for the Asset Management Conference, All-Staff Meeting, Building MI Communities Conference and the Homeless Summit?

*This information has not been collected for each event; however, Homeless Summit has traditionally been 50/50 check to credit card payments.*

58. Can you provide an approximate number of speakers for each event?



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*Archaeology Day typically has four.*

*For the BMCC, there are typically three or four keynote speakers (including the opening plenary). For the 2017 event, there were 95 break-out sessions with approximately 170 different panelists (some participated in more than one session).*

*Homeless Summit generally includes 1-2 keynotes with presenters for up to 30 sessions.*

59. Approximately how many exhibitors are anticipated for the archaeology day?

30

60. Graphic Design Services: should we include any direct costs in our budget/quote for printing of items such as brochures, folders, booklets, etc, or are we only expected to include our hours designing and coordinating the printing?

“Advertisement Design. Each ad designed is anticipated to require an initial design fee with additional hours billed. Provide quote as part of the bid package.” Does “provide quote as part of the bid package,” mean to include the Initial design fee (if there is one), as well as the hours dedicated to each ad design?

*Yes; please provide a sample of proposed direct costs.*