Request for Proposal
For
Conference Manager
And
Professional Conference Organizer
To support OCEANS Conference and Exposition

8 March, 2024

March 8, 2024

The nonprofit professional societies, Marine Technology Society (MTS) and the IEEE Oceanic Engineering Society (OES) (hereafter Societies) are looking to grow the OCEANS Conference and Exposition and are looking for a partner who can provide innovative solutions. The Societies are seeking a Conference Manager and a Professional Conference Organizer (PCO) for the OCEANS Conference and Exposition. The Conference Manager shall be independent of the PCO team. OCEANS Conference and Exposition is held annually in the fall in North America, and in the Spring/Early Summer in Asia and Europe in alternating years. The Societies are seeking a single Contactor to administer the North American, Asia, and European conferences. Teaming and or sub-contracting arrangements are permissible if there is a lead organization that will provide overall administration of the team and serve as the single point of contact for all OCEANS communications with the Societies.

The objective of this Request for Proposal (RFP) is a five-year proposal (with two options) for a Conference Manager and a separate team to provide Conference support to include Communications and Marketing, Sales, Event Management, and Logistics services for OCEANS Conference and Exposition.

Responses are due NO LATER THAN 2:00 P.M. Eastern Standard Time on April 24, 2024. Your response shall be submitted electronically to Kristina.norman@mtsociety.org.

Any questions related to this notice shall be submitted, via email, NO LATER THAN 2:00 P.M. Eastern Standard Time on March 20, 2024, to Kristina Norman, Kristina.norman@mtsociety.org, Answers will be posted on the MTS website, as soon as practical.

When responding, please include "OCEANS PCO" in the subject line. Proposals must be valid for 90 days from the date of submission. To verify receipt of your response, contact Kristina.norman@mtsociety.org.

We thank you for your consideration of submitting a response to this request.

Justin Manley (Mar 8, 2024 12:51 EST)

Brandy Armstrong (Mar 8, 2024 12:22 CST)

Justin Manley
President, MTS

Brandy Armstrong
President, IEEE-OES

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ACRONYM LIST

Acronym	Definition
CCE	Conferences, Events & Experiences @ IEEE
ECOP	Early Career Ocean Professional
F&B	Food and Beverage
IEEE	Institute of Electrical and Electronics Engineers, Inc
LOC	Local Organizing Committee
JCC	Joint Conferencing Committee
MTS	Marine Technology Society
OES	Oceanic Engineering Society
OCOP	OCEANS Conference Operational Policy Manual
PCO	Professional Conference Organizer
ROW	Rest of World
RFP	Request for Proposal
SPC	Student Poster Competition
WIE	Women in Engineering
YP	Young Professional

SECTION A

BACKGROUND

MARINE TECHNOLOGY SOCIETY

The Marine Technology Society (MTS), founded in 1963, is the leading international community of ocean engineers, technologists, policy-makers, and educators. MTS promotes awareness, understanding, advancement and application of marine technology and provides the ocean community with forums for the exchange of information, research, and ideas. For more information on MTS, please visit www.mtsociety.org.

IEEE – OCEANIC ENGINEERING SOCIETY

The Institute of Electrical and Electronics Engineers, Inc., (IEEE) Oceanic Engineering Society (IEEE-OES) started in 1968 as the Oceanography Coordinating Committee of IEEE. IEEE-OES strives for the advancement of the theory and practice of all aspects of science, engineering, and technology pertaining to all bodies of water. This includes the creation of new capabilities and technologies from concept design through prototypes, testing, and operation systems to sense, explore, understand, develop, use, and responsibly manage natural resources. or more information on IEEE-OES, please visit www.ieeeoes.org.

OCEANS CONFERENCE AND EXPOSITION OBJECTIVES

OCEANS is the event for global maritime professionals to learn, innovate, and lead in the protection and utilization of the world's largest natural resource – our Ocean. OCEANS is a nexus between government, industry, and academia. We blend a strong technical program with a robust exhibition. OCEANS is a major global forum where scientists, engineers, technologists, developers, and decision makers throughout the world meet, present, and discuss the latest research results, ideas, developments, and applications in all areas of oceanic engineering, science, and technology.

- OCEANS is a **leading influence** in the oceanic science and engineering community by fostering vibrant dialogues through the presentation of papers, town halls, panel discussions, career fairs, business to business and a robust exhibit.
- OCEANS is an **essential partner** to global programs, e. g. United Nations Oceans Decade, Global Ocean Observing System, and Ocean Tracking Network through expanded engagement and associating scientific meetings.
- OCEANS is an **innovative venue** that attracts the next generation of young professionals by offering tailored programs and networking opportunities to early career ocean professionals (ECOP), Young Professionals (YP), students and underrepresented groups to grow community cohesion.
- OCEANS is a **technology nexus** where new technology is showcased through technical papers, presentations in the exhibit floor, innovation theater and a robust exhibition.

CONFERENCE FREQUENCY AND LOCATION

There are two OCEANS Conferences and Expositions each year. OCEANS North America, is held annually the 4th full week of September. Currently the conference rotates on an ad hoc basis each year. For OCEANS North America, the Societies are considering naming a rotation of four standard locations with an optional fifth location identified at least two years prior and as beneficial

to OCEANS objectives. OCEANS Rest of World (ROW), rotates between Asia and Europe. In Asia, OCEANS is held the second week of April. In Europe, OCEANS is held the second week of June. Similarly, the locations in Asia and Europe are ad hoc and the Societies are considering moving to consistent locations. We are seeking input from the offerors on alternative rotations options. For more information on conference dates and locations see: https://oceansconference.org/.

Samples of Past and Future Conferences

Date/Year	Location	OCEANS Type
April 2016	Shanghai, China	ROW
September 2016	Monterey, California	North America
June 2017	Aberdeen, Scotland	ROW
September 2017	Anchorage, Alaska	North America
May 2018	Kobe, Japan	ROW
October 2018	Charleston, South Carolina	North America
June 2019	Marseille, France	ROW
October 2019	Seattle, Washington	North America
September 2020	Virtual Oceans (Singapore, Gulf Coast)	North America and ROW
September 2021	Hybrid (Seattle, Proto, Portugal)	North America and ROW
February 2022	Chennai, India	ROW
September 2022	Hampton Roads, Virginia	North America
June 2023	Limerick, Ireland	ROW
September 2023	Biloxi, Mississippi	North America
April 2024	Singapore	ROW
September 2024	Halifax, Canada	North America
June 2025	Brest, France	ROW
September 2025	Chicago, Illinois	North America
Summer 2026	Sanya, China	ROW
September 2026	Washington D.C.	North America

CONFERENCE FORMAT

OCEANS conference and exposition comprises both a technical conference and a state-of-the-art exhibition covering the fields of ocean science, engineering, and technologies. The technical conference consists of presentations (oral and posters) of peer reviewed abstracts, papers, panels, town halls and other special tracks and sessions. This is complemented by training, workshops, a SPC/ECOP/YP programing (e.g. breakfasts, MTS EMERGE), equity, diversity and inclusion programing, women's programing, awards ceremonies, tours, receptions, and other professional and social activities. The OCEANS conference planning and administration are governed by a policy manual OCEANS Conference Operational Policy Manual (OCOP), Hosting the OCEANS Conference - Operations Manual - OCEANS | Conference & Exposition. Previous OCEANS agendas/conferences are available here: https://oceansconference.org/.

- Duration of the OCEANS is normally four days (from Monday to Thursday) with Monday devoted to Tutorials, Workshops, SPC and other program orientations, and exhibit set-up and

Tuesday - Thursday devoted to technical sessions, exhibits, SPC, and other conference activities.

- Technical breakouts - 8 - 12 parallel sessions in 10 time slots. No technical sessions are held during the plenary session(s).
- 4-6 Town Hall, panel sessions.
- Technical papers - between 300 – 800.
- 1-2 Three Plenary Sessions – Tuesday/Wednesday/Thursday morning.
- Joint Society Awards Plenary held on Tuesday morning.
- ECOP/YP and Women in Engineering (WIE)/MTS Women's Initiative breakfasts on Wednesday and Thursday mornings respectfully.
- Lunch in the exhibit hall on Tuesday, Wednesday, and Thursday (the cost for this is included in the full conference registration fee).
- Networking evening function, typically Wednesday. The event is generally about 4 hours long and varies greatly in scope but typically some entertainment is included. Approximately 60 to 80% of the attendees attend. (the cost for this event is included in the full conference registration fee). Tickets can also be purchased separately.
- A welcoming reception, "Ice Breaker" allows registrants to pick up their registration packages - on Monday evening for approximately 2 to 3 hours. (the cost for this is included in the full conference registration fee). Exhibitor's Reception to support the Exhibitors on Tuesday evening for approximately 2 to 3 hours. (the cost for this event is included in the full conference registration fee). Tickets can also be purchased separately.
- Societies' Administrative meetings - approximately 10, scheduled throughout the conference, 5 - 50 attendees depending on the meeting. Paid for by the Societies and often planned by and held either in the venue or the conference hotel depending on cost.

GROWTH EXPECTATIONS

The Societies endeavor to increase conference attendance steadily each year. Over past 8 years OCEANS North America attendance was 1200-1600 with 80-120 exhibit booths. For OCEANS ROW the attendance was 600-900 with 40-60 exhibit booths.

The Society has set its growth goals to be achieved in the next 3-5 years of:

- Delegates: OCEANS North America - 3000; OCEANS ROW – 1500.
- Exhibits: OCEANS North America - 200-150; OCEANS ROW - 100.

The Societies are seeking a PCO that shares the same mission and proactively offer ideas to grow conference attendance and satisfaction, exhibitor satisfaction and international participation. The offerors should evaluate not only the appropriate ratio of exhibit booths to attendance but propose innovative ways to improve foot traffic and attendance by the appropriate levels of individuals that will improve the return on investment for the exhibitors.

Organization

The Conference Manager and the PCO will be under contract and be responsible to the Societies but will work alongside a Local Organizing Committee (LOC).

The LOC is comprised of professionals in relevant ocean science and engineering fields who assist with local arrangements and connections. The focus of the LOC is to conduct the technical program

and to provide local/regional expertise to the PCO. General Chair(s) are selected and serve as the main point(s)-of-contact with the PCO on all aspects of OCEANS. The Chairs typically have several committees supporting OCEANS and can delegate specific roles that may involve the PCO to committee Chairs. Most significant are the Technical Committee, SPC committee, and the Finance chair. The PCO will work with the committee chairs for the best conference experience possible.

SECTION B

STATEMENT OF WORK

Offerors are invited to respond for the provision of the following services. The list is not necessarily exhaustive and respondents are welcome to incorporate additional services as they believe would be required for the successful organization of the OCEANS conferences. The PCO must be able to support the planning for two conferences as year with a catalog three to four years out.

The list is intended to be indicative of the responsibilities of the Conference Manager, distinct from the POC, and the PCO as envisaged by the Societies. Where the offerors would team/sub-contract any such role this must be clearly stated.

1.0 MANAGEMENT

1.1 CONFERENCE MANAGER (KEY PERSONNEL)

The Societies are looking for a dedicated Conference manager, independent of the team provided as the PCO, to provide consistency across all OCEANS Conference and Exposition, be the main point of contact between the PCO team and the Societies, work with the Societies to establish good business practices around administering OCEANS, and work with the Societies to double the size of OCEANS in the next five years. Duties include:

- Work collaboratively with the Joint Conference Committee (JCC) to build the brand and overall operations of OCEANS.
- Update the OCOP as business practices evolve.
- Guide, with OCEANS Steering Committee's authority, a rolling timeline of OCEANS to ensure deadlines are met.
- Work with the LOC, the OES VP-Oceans, IEEE Conferences, Events & Experiences @ IEEE (CEE) Representative and MTS VP for Budget and Finance on drafting the Statements of Work for approved by IEEE CEE and the MTS President no later than 18 months ahead of the conference.
- Attend all LOC calls to provide continuity.
- Convene and provide administrative support the JCC.
- Identify other conferences and use the information to improve the OCEANS.
- Develop, with the JCC, strategies to increase attendance and new channels for content (e.g. job fairs, non-author tracks, industry outreach, etc.).
- Ensure OCEANS conference websites and planning documents are accurate and up to date
- Support future LOCs for initial paperwork requirements for OCEANS (e.g. IEEE Supports future LOCs in reporting information to the conference sponsors as necessary to comply with applicable organizational policies).
- Work with OES SPC Chair, MTS VP of Education, and other contributors and stakeholders to provide consistent guidance to LOC SPC chairs to ensure a smooth program.
- Work with the OES YP Coordinator and YP BOOST Laureates and the MTS ECOP section for programming at OCEANS.
- Collaborate with volunteer groups at both OES and MTS in pursuit of new OCEANS program elements, including, but not limited to OES YP and MTS ECOP, OES Women in Engineering (WIE), MTS Women Leadership in Technology and Science, as well as the Societies' efforts

on Equity, Diversity, Inclusion, Accessibility and Sustainability. Attend OCEANS to observe operations, logistics, programming quality, vender satisfaction and capture issues.
▪ Organize the OCEANS hot wash, document and implement lessons learned.

1.2 PROJECT MANAGEMENT
▪ Conference Planning (coordinate and participate in meetings with the Societies/LOC, planning of activities and updating of operations).
▪ Responsible for meeting deadlines specific to the PCO in the rolling timeline of OCEANS conferences.
▪ Work with the LOC for inclusion of regional/local knowledge to OCEANS.
▪ Coordinate with the official conference photographer and manage all requested photographs.
▪ Budgeting (management of the Conference budget), and post conference auditing.
▪ Negotiate vendor contracts; final approval of the selected vendor is with the LOC or the Societies depending on the dollar value.
▪ Venue Management (venue selection and negotiation of the contract)
    o Conduct pre-conference meetings with hotel/convention center to review and confirm conference details.
    o Negotiate any required amendments to existing contracts.
▪ Order all necessary signage including contracting the vendor, oversee production and printing including but not limited to breakout meetings, technical sessions, directions, social events, registration, and banners.
▪ Arrange for security personnel if necessary.
▪ Arrange for shipping and storage.
▪ Manage the technical program space. Work with the Technical Program Chairs in determining meeting room requirements, speaker ready room and room assignments.
▪ Financial Management (management of contracts, bank accounts, account-keeping, tax management, invoicing and payments, cash-flow control) in coordination with the LOC financial chair.
▪ Monitor and report on expenses and budget variances.
▪ Management of Suppliers (selection and contracts).
▪ Administration (management of all matters relating to the Conference).

1.3. FOOD AND BEVERAGE (F&B)
▪ Responsible for negotiating F&B as part of the venue contract, as well as F&B at other locations associated with the conference.
▪ Monitor food & beverage functions and advise on budget variances. Costs should be minimized but not to the point that diminishes the attendee experience.

1.4 DELEGATE REGISTRATION
▪ Definition of Registration Fees in coordination with the Societies.
▪ Processing of Registrations (on-line, paper, on-site, collection/invoicing of fees, statistical reports).
▪ Provide registration system that integrates with OCEANS standard technical program software, or propose a register system that can link to IEEE Xplore.

1.5 SOCIAL PROGRAM AND TOURS

- Proposal of Social Activities (Welcome reception, Networking Events etc.).
- Proposal of Tours and Pre- and Post- Conference Tours.

1.6 HOTEL ACCOMMODATION

- Hotel Reservation (block bookings, negotiation of hotel rates and contracts, payments, management of modifications, reporting, etc)
- Management of Hotel Accommodation (allocation of rooms to individual participants and/or groups).
- Act as close liaison with hotels to communicate changes in group requirements (block room, meeting space, food & beverage, upgrades, etc.).

1.7 TRANSPORT MANAGEMENT

- Scheduling and management of Transport services (hotel shuttle to conference events).

1.8 ON-SITE STAFF

- Enable enforcement of code of conduct guidelines as defined by the OCEANS steering committee.
- Selection, briefing and management of on-site staff (welcome desk, hotels, venue, tours, etc).
- Monitor and provide guidance for volunteers.
- Monitor conference social and hospitality functions,
- Manage crisis and emergency management in coordination with facility staff.
- Ensure all contract obligations are met by all parties.
- Serve as the property and vendor liaison.
- Track shipping for all known deliveries.
- Ensure correct signage and placement.

1.9 CONFERENCE TECHNOLOGY

- Implementation of Audiovisual Equipment, conference apps, use and content of social media, and on-site networking solutions, including Wifi.

2.0 SCIENTIFIC PROGRAM MANAGEMENT

The Societies will be responsible for the Scientific Program. Offerors should not include this section in their response.

3.0 MARKETING AND PROMOTION

The contractor is responsible for the overall marketing and communications for OCEANS.

- OCEANS Marketing and Promotional Strategy.
- Provide a plan for the growth of attendee and exhibitor attendance at OCEANS.
- Production of Promotional OCEANS Activities and Materials (website, announcements, programs, badges etc).
- Promote the conference based on technical content developed by the LOC.
- Maintain the https://oceansconference.org/ website.
- Mailing List Management and Maintenance.

- Provide marketing communications that can be distributed by partners and stakeholders.

4.0 SPONSORSHIP AND EXHIBITION

The Contractor shall work with the LOC on Exhibit Advance Planning, Exhibit Space Sales, Exhibit Management and Exhibit Finances and serve as the direct liaison with all vendors and exhibitors:

- Sponsorship Management (identification and development of sponsorship opportunities and guidelines, sales and marketing to potential sponsors and delivery)
- Exhibition management (selection of space, production of guidelines and floor plans, sales and allocation of spaces, stand services, contracts, invoicing, on-site management)
- Prepare Exhibitor Prospectus (Exhibitor Prospectus advertises the conference, describes the layout of exhibit and conference space, sets forth rules, provides fees and payment schedule, and provides the Exhibitors Contract.)
- Assist in preparation of exhibitor rules, fee schedules, and contract, as well as incentives to promote early exhibitor commitment.
- Provide the Exhibitor's Prospectus for the conference website and for email delivery to OCEANS vendors. Mail or email the Prospectus to recruit new vendors.
- Continual sales effort to sell exhibit space (sales calls, email follow up, etc).
  - Maintain records
  - Collect contracts and payments, invoice as necessary
  - Establish and maintain exhibitor prospect database
  - Provide weekly status reports
- Manage booth assignments.
- Monitor/supervise exhibit move in/move-out, onsite contact/onsite sales effort

SALES EXHIBITOR AND ATTENDEE DATA

All exhibitor and attendee data for OCEANS is the property of the Societies. The Contractor will provide all contact information to Societies in a data format to be determined.

PERIOD OF PERFORMANCE

The base period of performance of this contract is from July 1, 2024 through 31 March 2029. If an option is exercised, the period of performance shall be extended through the end of that option period.

The option periods that may be exercised are as follows:

Period	Start Date	End Date
Option 1	1 April, 2029	31 March 2032
Option 2	1 April 2032	31 March 2036

PLACE OF PERFORMANCE

This is entirely remote performance.

TRAVEL AND TRIP REPORTS

The contractor shall be required to travel to prospective venues and attend OCEANS. All travel required by the Societies will be reimbursed to the Contractor in accordance with MTS travel policies. The contractor will plan, coordinate, and obtain Societies' approval in advance, for all travel and shall provide the Societies' a trip report that has a narrative of the visit's important events.

SECTION C

PROPOSAL FORMAT

The electronic submission for each volume shall be prepared in Microsoft (MS) Office 2019 Suite or prior versions (MS Word or MS Excel where applicable) or searchable Adobe Acrobat (.pdf) format. Security permissions on the ".pdf," ".xlsx," and ".docx" files shall be set to allow the Societies to select, cut, paste, review, and print text and graphics without the need for a password. Each email shall be limited in size to 22MB or less. If multiple emails are required, the subject of the email shall specify the number and total of email submissions (e.g. 1 of 2, 2 of 2, etc.). Hard copy proposals will not be accepted.

Proposals shall not exceed 25 single-spaced pages. Pages over the maximum page limitation will be excluded from evaluation. The cover page, table of contents, reference letters, resumes, letters of commitment, acronym lists, and indexes are excluded from any page counts. However, page limits are inclusive of tables, diagrams, illustrations, or any other pictorial devices included in the Offeror's quotation submission. All pages of each volume shall be appropriately numbered and identified by the complete company name, and date, in either the header or footer. Proprietary information shall be clearly marked.

All narrative text contained in the proposal response must be formatted to 8 ½ x 11 paper with margins of at least 1" at the top, bottom, and both sides; Times New Roman 12 point font. For charts, tables, exhibits and figures, no less than 10 point font is acceptable. Narrative text of the proposal shall not be inserted into a chart, table, exhibit, or figure in order to circumvent the 12 point font requirement.

EVALUATION CRITERIA

- The offeror shall explain in their proposal how they will organize, staff, and manage the contract and the management means that will be used to accomplish the contract requirements. The offeror shall provide information to facilitate the Societies' consideration of technical capability and corporate experience. For corporate experience, the Societies are most interested in examples of real work with actual results of the offeror in performing requirements like those of this solicitation in terms of size, scope and complexity. The Societies are more interested in the quality and similarity of the corporate experience examples to the requirement than the quantity of examples. The contractor shall provide details regarding project size, scope, and complexity for its examples of corporate experience. Corporate experience shall be limited to work performed during the five-year period preceding the RFP release date.
- Ability – Offerors are required to demonstrate their ability to provide the required services as detailed in the 'Services to be provided' above.
- Staffing – Offerors are required to give an overview of their infrastructure including staffing, experience, and accreditation. Include resume and Letter of Commitment of Key Personnel.
- The Offerors shall, as a minimum, be capable of providing professional Conference managerial services for the Conference to international standards and best practices.
- Financial viability – Offerors are required to demonstrate their financial credibility.
- Proven track record – Offerors are required to demonstrate their experience as a Conference Manager and PCO by providing information on meetings they have managed - especially meetings of a similar size and complexity. Provide examples of shows that have grown exponentially under Contractor's management

- Financial Management - Offerors are required to demonstrate their competence in financial management including qualification of personnel in this respect.
- Management System Certification – Offerors are required to specify all management system certifications they have: e.g. ISO 20121 (Event Sustainability), ISO 9001 (Quality), ISO 14001 (Environmental), etc.

REFERENCES

Offerors are required to submit at least three referees who will be contacted by representatives of the Societies. Details required are name, contact information, meeting with which they were/are associated and position in relation to the organizers of that meeting. Additional letters of reference may also be attached.

FEES AND COST STRUCTURE

The offerors are required to clearly state fees to be charged for services. Offerors will discuss their traditional fee structure for conferences. Offerors shall ensure a detailed price estimate detailing all assumptions made for services outlined in Section B.

Offerors are asked to outline any other charges that may be made, such as mailings, telephone, e mail, IT, general stationery, additional staff costs etc. Any additional service charges on other budget items should be clearly stated.

SUBCONTRACTORS AND TEAMING ARRANGEMENTS

If the Contractor will be subcontracting or teaming as any part of the proposal, please clearly indicate what will be done by Contractor's organization, what will be subcontracted and how Contractor will manage it. Specifically, the working relationship Contractor has had with the sub and on which expos and tradeshows.

EVALUATION PROCESS

There will be two phases to the evaluation process.
- Phase 1: Written responses will be evaluated by a joint MTS and OES selection committee. The joint committee will determine the finalist who will be invited to provide a presentation.
- Phase 2: Finalists will be requested to provide a Presentation to the joint committee – PowerPoint (limit 60-minute brief includes Q&A).

AWARDING OF CONTRACT

It should be noted that the Appointment of the Conference Manager and PCO and the Awarding of this Contract will not be dependent only upon the fees quoted, but will be dependent upon the proven ability of the Contractor to have understood the requirements of OCEANS and their ability based on experience to deliver the event. Any appointment will be subject to successful contract negotiation.

The Societies reserve the right to not make any contract awards.

Oceans_Conf Manager_PCO_RFP_8 March

Final Audit Report   2024-03-08

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