



REQUEST FOR PROPOSAL

RFP NUMBER: CSP903015
 INDEX NUMBER: BWC015
 UNSPSC CATEGORY: 80141900. 80141607

The state of Ohio, through the Department of Administrative Services, Office of Procurement Services, on behalf of the OHIO BUREAU OF WORKERS' COMPENSATION, is requesting Proposals for:

TITLE: EVENT LOGISTICS AND TRADE SHOW MANAGEMENT SOFTWARE AND SERVICES FOR THE OHIO SAFETY CONGRESS AND EXPO

OBJECTIVE: The Ohio Bureau of Workers' Compensation (BWC) seeks to acquire a contractor to provide event logistics and tradeshow management software and services to assume the overall responsibility for management and logistics; personnel support and provide tradeshow management software for the Ohio Safety Congress and Expo as indicated in this document.

RFP ISSUED: July 18, 2014
 INQUIRY PERIOD BEGINS: July 18, 2014
 INQUIRY PERIOD ENDS: August 8, 2014 at 8:00 AM
 PROPOSAL DUE DATE: August 15, 2014 by 1:00 PM

Proposals received after the due date and time will not be evaluated.

Submit Sealed Proposals to:

Department of Administrative Services
 Office of Procurement Services
 Attn: Bid Desk
 4200 Surface Road
 Columbus, OH 43228-1395

Note: Please review the [Proposal Instructions](#) on our Web site.

The Offeror must submit this cover page (signed) with its Technical Proposal.

<p>Offeror Name and Address:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>E-Mail Address: _____</p> <p>Phone Number: () _____ - _____, Ext. _____</p>	<p>Name/Title:</p> <p>_____</p> <p>_____</p> <p>Signature: _____</p> <p>By submitting a response to this RFP, and signing above, Offeror acknowledges, understands and agrees to comply with the RFP requirements and confirms all the instructions and links have been read and understood.</p>
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CALENDAR OF EVENTS The schedule for the Project is given below, and is subject to change. DAS may change this schedule at any time. If DAS changes the schedule before the Proposal due date, it will do so through an announcement on the State Procurement Web site area for this RFP and an addendum to this RFP, also available through the State Procurement Web site. After the Proposal due date and before the award of the Contract, DAS will make scheduled changes through the RFP addendum process. DAS will make changes in the Project schedule after the Contract award through the change order provisions located in the general terms and conditions of the Contract. It is each prospective Offeror's responsibility to check the Web site question and answer area for this RFP for current information regarding this RFP and its calendar of events through award of the Contract. No contact shall be made with agency/program staff until contract award is announced.

DATES:Firm Dates:

RFP Issued:	July 18, 2014
Inquiry Period Begins:	July 18, 2014
Inquiry Period Ends:	August 8, 2014, at 8:00 a.m.
Proposal Due Date:	August 15, 2014, by 1:00 p.m.

Estimated Dates:

Presentations (if necessary):	September 8–12, 2014
Contract Award Notification:	September 17, 2014
Contract Commences:	October 1, 2014

NOTE: The estimated dates are subject to change.

There are references in this RFP to the Proposal due date. Prospective Offerors must assume, unless it is clearly stated to the contrary, that any such reference means the date and time (Columbus, Ohio local time) that the Proposals are due.

Proposals received after 1:00 p.m. on the due date will not be evaluated.

RFP GLOSSARY OF TERMS

AA:	Affirmative Action
BWC:	Ohio Bureau of Workers' Compensation
CEU:	Continuing Education Unit
CFP:	Call for Presentations
Contractor:	Vendor after Award
CSP:	Competitive Sealed Proposal
DAS:	Ohio Department of Administrative Services
EOD:	Equal Opportunity Division
FEI:	Federal Employer Identification
Mandatory:	Must, Will, Shall
OAC:	Ohio Administrative Code
OAKS:	Ohio Administrative Knowledge System (Ohio's Accounting System)
OBG:	Ohio Business Gateway
Offeror:	Vendor Submitting Proposal
OPS:	Office of Procurement Services
ORC:	Ohio Revised Code
RFP:	Request for Proposal
SOS:	Secretary of State
UNSPSC:	The United Nations Standard Products and Services Code

1.0 EXECUTIVE SUMMARY

- 1.1 INTRODUCTION: This is a request for Competitive Sealed Proposals (CSP) (Proposals) and is being solicited through this Request for Proposal (RFP) under Section 125.071 of the Ohio Revised Code (ORC) and Section 123:5-1-08 of the Ohio Administrative Code (OAC). The Department of Administrative Services (DAS), Office of Procurement Services (OPS), on behalf of the Ohio Bureau of Worker's Compensation (BWC) (the Agency), is soliciting Proposals for Event Logistics and Tradeshow Management Software and Services for the Ohio Safety Congress and Expo. If a suitable offer is made in response to this RFP, the state of Ohio (State), through DAS, may enter into a contract (the Contract) to have the selected Offeror (the Contractor) perform all or part of the Project (the Work). This RFP provides details on what is required to submit a Proposal for the Work, how the State will evaluate the Proposals, and what will be required of the Contractor in performing the Work.

This RFP also gives the estimated dates on page one, for the various events in the submission process. While these dates are subject to change, prospective Offerors must be prepared to meet them as they currently stand.

- 1.2 CONTRACT PERIOD: Once awarded, the term of the Contract will be from the October 1, 2014 through September 30, 2016. The State may solely renew all or part of this Contract at the discretion of DAS on behalf of BWC for a period of one month and subject to the satisfactory performance of the Contractor and the needs of the Agency. Any other renewals will be by mutual agreement between the Contractor and DAS on behalf of BWC for any number of times and for any period of time. The cumulative time of all mutual renewals may not exceed three (3) years and are subject to and contingent upon the discretionary decision of the Ohio General Assembly to appropriate funds for this Contract in each new biennium.

- 1.3. BACKGROUND: Under the mandates of the Ohio Revised Code (ORC), the Ohio workers' compensation system is the largest exclusive state insurance fund system in the United States, with investment assets of \$24 billion as of November 30, 2013 and annual insurance premiums and assessments of approximately \$1.5 billion. The Ohio workers' compensation system consists of the Ohio Bureau of Workers' Compensation (BWC), responsible for administrative and insurance functions, and the Industrial Commission of Ohio (IC), responsible for claims adjudicative functions. BWC exercises fiduciary authority with respect to the SIF and related Specialty Funds. These BWC Trust Funds are held for the benefit of the injured workers and employers of Ohio. It is from these Trust Funds that all claims for both medical and compensation for disability benefits are paid with the exception of self-insured claims. Self-insuring employers have been granted the status of self-insurance by having proven ability to meet certain obligations set forth in ORC Section 4123.35. BWC monitors self-insuring employers, which administer their own workers' compensation claims. Presently, BWC processes claims, pays compensation and medical benefits to injured workers and underwrites workers' compensation coverage for employers doing business in Ohio. BWC also offers safety training and accident prevention programs to employers and helps injured employees return to work through rehabilitation programs. The BWC Board of Directors, as a fiduciary, oversees BWC's activities and functions.

BWC is seeking a Contractor to provide event logistics and tradeshow management software and services for the Ohio Safety Congress & Expo. The event is held in Ohio between mid-March and mid-April each year. The 2015 Ohio Safety Congress and Expo will be held beginning March 31 through April 2, 2015 at the Greater Columbus Convention Center in Columbus, Ohio.

The three to four day event offers three general sessions, approximately 185 educational sessions and 225 exhibiting organizations. Approximately 6,000 safety and health professionals and 500 exhibit personnel attend. The Safety Congress educates Ohio employers and employees in safety as well as health standards to prevent occupational accidents and illnesses in an effort to reduce workers' compensation claims. Attendee registration and admission is free of charge.

Individuals who attend the event have responsibility for the safety and health performance of their organization. Their job titles include: safety director, operations manager, human resource manager, occupational health nurse, risk manager, workers' compensation administrator and other related professions.

Exhibiting organizations represent manufacturers, distributors and suppliers of safety products and equipment, consultative services, safety training, rehabilitation, risk management and workers' compensation programs.

- 1.4. SCOPE OF WORK: The Ohio Bureau of Workers' Compensation seeks a contractor to provide state-of-the art software solutions for event logistics and to provide onsite personnel support. The Offeror, in its Technical Proposal must provide a complete explanation of its capability to satisfy BWC's requirements for the following aspects of the event as described in detail on pages 6 through 17 of this RFP below.

1. Event Program Committee Management Services
2. Event Speaker/Presenter Session Submission and Tracking Service
3. Event Speaker Management
4. Event Website and Development

5. Event Communication and Marketing Services
6. Attendee and Exhibitor Advance Registration
7. On-Site Event Registration
8. Educational Session Continuing Education Unit (CEU) Tracking and Reporting
9. Session Evaluation Tracking, Recording and Analysis
10. Session Wait List Management
11. Event Data Access and Reporting
12. Exhibitor Lead Retrieval Services
13. Exhibitor Task Management

The Offeror may propose the following optional or other relevant services at its option. If offered optional services will not be a part of the proposal technical, cost or overall evaluation. Optional services may however be considered by BWC after a Contractor has been selected subject to the availability of funding.

1. Event Mobile Device Application (App)
2. Prospectus and Interactive Floor Plan
3. Exhibitor Booth Sales Support
4. Other Proposed Optional Services

Offerors should review Appendix I on pages 25 and 26 for a more comprehensive explanation of Optional Services and how to include them in your proposal.

Offeror Qualifications: The Offeror must demonstrate consistently successful experience in providing event logistics software and onsite services for association and/or professional tradeshow and events with: attendance exceeding 3,000; exhibitors exceeding 100; concurrent educational sessions exceeding 100; session tracking and CEU reporting exceeding 500 occurrences; and onsite registration and session tracking equipment and personnel.

Offeror must provide references to demonstrate it meets or exceeds all requirements of experience, hardware and software capability and the ability to provide personnel as delineated in the mandatory requirements listed in Tab Section 2.1.

1. Offeror must provide at least three references of providing service to events consistent with the Offeror qualifications stated above, Reference statements for each event must include the following:
 - a. The name, location and last date you serviced the event
 - b. The number of attendees
 - c. The number of exhibitors
 - d. The number of concurrent sessions
 - e. The type and number of continuing education accreditations offered and tracked
 - f. The number of times/years you have provided services for the event
 - g. A complete description of the services you provided for the event
 - h. A primary and secondary client contact name, phone and email address for the event
 2. Use Form 5.2.5. and insure that all information required above is included on the form. DAS will contact named references to verify information submitted.
 3. Offeror must complete and submit all forms in Section 5.2 of this solicitation.
- 1.5 CONFIDENTIAL, PROPRIETARY OR TRADE SECRET INFORMATION: DAS procures goods and services through a RFP in a transparent manner and in accordance with the laws of the state of Ohio. All proposals provided to DAS in response to this RFP become records of DAS and as such, will be open to inspection by the public after award unless exempt from disclosure under the Ohio Revised Code or another provision of law. Refer to section 5.1.1 in the Instructions.
 - 1.6 REGISTRY OF OFFERORS: DAS will prepare a registry of Proposals received containing the name and address of each Offeror. The registry will be on the Office of Procurement Services Web site and available for public inspection after the Proposals are received.
 - 1.7 PROPOSAL SUBMITTAL: Offeror must submit both a "Technical Proposal" and a "Cost Proposal" as a part of its Proposal package. These are two separate components which shall be submitted in separate sealed envelopes/packages, clearly identified on the exterior as either "Technical Proposal" or "Cost Proposal" with CSP903015 and due date on each. Offeror must submit a signed cover page with its Technical Proposal. Offeror shall mark the correct CSP number on all envelopes/packages. Refer to section 5.1.1 in the Instructions for further detail.
 - 1.8 NUMBER OF PROPOSALS TO SUBMIT: Offeror must submit one (1) original, completed and signed in blue ink, and four (4) copies for a total of five (5) Proposal packages. The Offeror must also submit a complete copy of the

Proposals on a CD or USB flash drive in Microsoft Office (Word, Excel, or Project) 2003 or higher, format and/or PDF format as appropriate.

2.0 EVALUATION OF PROPOSALS

2.1 MANDATORY REQUIREMENTS: The following table contains items that are Mandatory Requirements for this RFP.

TABLE 1 - MANDATORY PROPOSAL REQUIREMENT

Mandatory Requirement	Yes	No
The Offeror shall provide attendee onsite registration, equipment, staff / personnel, installation, training of BWC staff, equipment dismantling and removal as described in Table 3 the Scope of Work Item # 7 and Appendix V of this RFP. Answer Yes or No.		

2.2 PROPOSAL EVALUATION CRITERIA: If the Offeror provides sufficient information to DAS in its Proposal, demonstrating it meets the Mandatory Requirements; the Offeror's Proposal will be included in the next step of the evaluation process which involves the scoring of the Proposal Technical Requirements (Table 3), followed by the scoring of the Cost Proposals. In the Proposal evaluation step, the evaluation committee rates the Proposals based on the following listed criteria and the weight assigned to each criterion. The possible points allowed in this RFP are distributed as indicated in the Table 2 - Scoring Breakdown.

2.3 TABLE 2 - SCORING BREAKDOWN:

Criteria	Maximum Allowable Points
Proposal Technical Requirements	1400 Points
Proposal Cost	450 Points
Presentations, Interviews, Demonstrations (if applicable)	150 Points
Total	1850 or 2000 Points

2.4 SCORE RATINGS: The scale below (0-5) will be used to rate each proposal on the criteria listed in the Technical Proposal Evaluation (Table 3).

DOES NOT MEET 0 POINTS	WEAK 1 POINT	WEAK TO MEETS 2 POINTS	MEETS 3 POINTS	MEETS TO STRONG 4 POINTS	STRONG 5 POINTS
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DAS will score the Proposals by multiplying the score received in each category by its assigned weight and adding all categories together for the Offeror's Total Technical Score in Table 3. Representative numerical values are defined as follows:

DOES NOT MEET (0 pts.): Response does not comply substantially with requirements or is not provided.

WEAK (1 pt.): Response was poor related to meeting the objectives.

WEAK TO MEETS (2 pts.): Response indicates the objectives will not be completely met or at a level that will be below average.

MEETS (3 pts.): Response generally meets the objectives (or expectations).

MEETS TO STRONG (4 pts.): Response indicates the objectives will be exceeded.

STRONG (5 pts.): Response significantly exceeds objectives (or expectations) in ways that provide tangible benefits or meets objectives (or expectations) and contains at least one enhancing feature that provides significant benefits.

2.5 TABLE 3 - TECHNICAL PROPOSAL EVALUATION:

Criterion	Weight	Rating (0 to 5)	Extended Score
Offeror Profile			
<p>1. Offeror Profile. Each Proposal must include a complete and detailed profile of the Offeror's history, capability, capacity and relative experience providing trade show event management and onsite services and software for events containing all the following characteristics: attendance exceeding 3,000, exhibitors exceeding 100, concurrent educational sessions exceeding 100, session tracking and CEU reporting exceeding 500 occurrences and onsite registration and session tracking equipment and personnel. Use Form 5.2.3. for this purpose.</p>	20		
<p>2. Offeror Previous Project Experience. The Offeror must include in its Proposal complete and comprehensive descriptions of at least three events of the same size and scope as the Ohio Safety Congress and Expo (as described) for which it has provided event management, software, equipment and onsite services within the last three years. Use Form 5.2.4. for this purpose.</p>	20		
<p>3. Offeror References. The Offeror must provide a minimum of three (3) references from previous events similar size and scope as the Ohio Safety Congress and Expo and must complete all sections of Form 5.2.5. for each of the three references provided. These references must relate to work that was completed within the last three years.</p>	20		
Staffing Plan			
<p>1. Offeror Staff Assignments and Credentials. The Offeror must identify the team of employees it proposes to work on this project, identify the work assignment of each, the amount of work and time each will perform, each's educational background and experience in performing the type of work assigned on projects of similar size and scope as the Ohio Safety Congress and Expo. The Offeror must complete all areas of Form 5.2.6.</p>	10		
<p>2. Offeror Project Manager. The Offeror must identify the Project Manager who will be assigned to this project/event. The Project Manager assigned must have managed projects on behalf of the Offeror on at least three (3) events similar in size and scope to the Ohio Safety Congress and Expo. Use Form 5.2.6. to provide the Project Manager's credentials.</p>	15		
<p>Scope of Work – The following is the work BWC desires with the Ohio Safety Congress and Expo. Offerors should include a complete description of their ability to perform each segment,</p>			
<p>1. <u>Event Program Committee Management Services</u>: Thirty-six volunteer program committees develop the 180 educational sessions for the Ohio Safety Congress & Expo. Each committee focuses on a specific industry in safety, health or workers' compensation. A committee is comprised of a BWC employee who acts as the liaison between the committee and event management, a chair, 1st vice chair, 2nd vice chair, 3rd vice chair and general members. The chair and vice chair positions rotate every year.</p>			

<p>The Offeror must provide a dedicated online database for individuals planning educational sessions for the Ohio Safety Congress & Expo. The database must include but is not limited to the items listed below.</p> <p>A. Deliverables:</p> <p>Describe your solution as it pertains to event program committee services, including but not limited to the items listed above and below. Offeror may propose multiple solutions in which case each solution must be fully outlined.</p> <ol style="list-style-type: none"> 1. Access to update contact information for all members of committees 2. Assign committee positions (chair, members, etc.) and rotate chair positions accordingly 3. Provide varying levels of access to the committee data depending on committee position 4. Provide description of each position's responsibilities 5. Ability to send and track correspondence to all members regarding planning meetings, deadlines and general event information. <p>Refer to Appendix V for the data format requirements for this requirement.</p>	15		
<p>2. <u>Event Speaker / Presenter Session Submission and Tracking Service:</u> Approximately 10 months before the event, BWC releases a Call for Presentations (CFP) to solicit and collect possible session topics and speakers for the upcoming event. The CFP is distributed via BWC's website, twitter, a monthly newsletter created by BWC called eNews and emails. After the CFP is closed, BWC provides all CFP submissions to the 36 program committees for review and possible selection.</p> <p>A. Deliverables: Describe your capability of providing an online speaker / presenter information database with the components and capabilities including but not limited to the items listed above and below.</p> <ol style="list-style-type: none"> 1. Creation of speaker account that has name, session title, date, and time 2. Has deadline for abstract and PowerPoint submission 3. Email sent to speaker notifying them that the account has been created 4. Automatically send copy of completed form to presenter when finished 5. Have a list of audio visual equipment available to select from 6. Abstract guidelines 7. Be able to upload speaker resume or curriculum vitae. 8. Allows speaker to upload abstract, submit learning objectives, and tell if there is a conflict of interest online 9. Assign multiple sessions to one speaker account to eliminate duplicates 10. Program committee member review and accept/reject of each CFP submission 11. Program committee assignment of date/time on agenda for accepted CFPs <p>Refer to Appendix V for the data format requirements for this requirement</p>	15		
<p>3. <u>Event Speaker Management:</u> Each year BWC has over 180 volunteer speakers at the Ohio Safety Congress & Expo. The speakers require different information than an attendee or exhibitor, which is where the need for speaker management comes into play. Once a username and password have been created for each speaker, they will be able to login to a speaker-only portal that allows them to update their bio or contact info, upload handouts and slides, view pre-registration session attendance, request and/or update audio visual needs, and see a checklist of items that they should complete before arriving onsite. The speaker portal is a critical piece to the speaker being well informed</p>			

<p>and the conference being an overall success.</p> <p>A. Deliverables: The Offeror must provide a dedicated speaker portal for individuals presenting educational sessions at the Ohio Safety Congress & Expo. The speaker portal must include but may not be limited to the items listed below.</p> <ol style="list-style-type: none"> 1. Email notification of a login name and password for speaker's personal account. 2. Calendar of events with deadlines; auto-generated alerts when a deadline approaches and when a deadline has passed. 3. Links to important information such as hotels, presentation guidelines, etc. 4. Upload capability for handout materials, such as PowerPoint presentations, word processing documents and .pdf files, biography, resume and photo 5. Session review and approvals by multiple parties 6. Download important event materials 7. Instantaneous update of speaker changes, after show management approval 8. Individual and group export of PowerPoint (PPT) presentations and uploaded files 9. Tracking of previous download of files 10. Ability to identify newly uploaded or replaced PPT presentations and files 11. Speaker responsibility contract 12. Ability for presenters to download important event materials 13. Ability for event management to import/upload sessions and presenters into module 14. Ability for event management to update/cancel a session or speaker 15. Upload capability for multiple handout materials, such as PowerPoint presentations, word processing documents, .wav files for embedded video, .pdf files, spreadsheets, biography, resume and .jpg photos 16. Ability for presenter to modify uploaded files or remove/replace uploaded files 17. Notification to event management that uploaded materials have been modified 18. Opt-out option for presenters not using presentation materials 19. Option for presenters who choose to submit materials via US Mail 20. Option for presenters to identify proprietary material 21. Option for presenter to request laptop provided by event management 22. Ability to disable certain functionalities based upon pre-determined dates, e.g. turn-off upload feature so PowerPoint files can be loaded to event laptops 23. Ability to identify presenter materials which have been exported/downloaded by show management 24. Ability for show management to capture notes/comments about presenters 25. 24/7 report capabilities and download features with presenters and sessions identified by session number 26. Data displayed by session number and sort capabilities by session title, presenter last name, task completion, etc. 27. Export/Download items must include session number in all file names 	<p>15</p>		
<p>4. <u>Event Website and Development:</u> In each event marketing piece or communication, BWC directs customers (attendees, speakers, exhibitors, etc.) to the event website. The website contains everything individuals or organizations planning to attend the conference should need including general session speakers, exhibitor prospectus and last year's exhibiting companies, hotel and travel accommodations, the 36 volunteer program committees, searchable lists of educational</p>			

<p>sessions and continuing education credits, and important announcements and updates. The information on the event webpage changes constantly throughout the production of the Ohio Safety Congress & Expo. Thus the ease and quickness of updates is vitally important. BWC desires a website platform to expedite and improve the information flow for the event.</p> <p>A. Deliverables: Offeror must completely explain your capability of providing webpage management systems software including but not limited to the items listed below.</p> <ol style="list-style-type: none"> 1. Link trails 2. Custom headers/tabs with event branding 3. Show management access to continual/consistent updates 4. Uploading capabilities/instant speaker uploads 5. Custom headers and graphics 6. Customizable reporting features 7. Multiple web pages 8. Click throughs / page visit measures / counts 9. Customizable URLs 10. Must be a Web-based service -- No hardware, software or installation required 11. Website has test pages before it goes live 12. Be able to create website with little to no experience in designing a webpage 13. Custom site with BWC logos and branding material 14. Create domain name 15. Secured with SSL – highest level of encryption 	15		
<p>5. <u>Event Communication and Marketing Services:</u> The Ohio Safety Congress & Expo sends marketing campaign pieces and regularly corresponds with customers throughout the event process. Most of the marketing pieces are email blasts sent to advise customers that registration is open, the Call for Presentation has been released, booth sales have begun, the classes and continuing education types being offered and other deadlines about the event. We also create a targeted market flyer for each one of the 36 program committees that lets customers interested in that area of safety know which sessions may be applicable to them. In addition to the electronic pieces, we create, print and mail a save the date post card, a more detailed tri-fold, and a 160 page event guide with all the information about the conference.</p> <p>A. Deliverables: Offeror must fully explain its capability to provide the items listed below associated with event communication and marketing services.</p> <ol style="list-style-type: none"> 1. Ability to send emails to attendees and exhibitors directly from an email address identified by event management 2. Ability to send targeted emails to send out to various groups and sub-groups 3. Auto email reply to new vendors 4. Ability to brand and personalize email messages 5. Ability to track responses to monitor effectiveness 6. Ability to manage all communication mediums from one site 7. Instantaneous updates across all communication mediums 8. Option to have custom HTML emails and marketing pieces that include graphics 9. Electronic versions of print campaign materials to send to customers 10. Ability to interact with customers through marketing pieces and/or have customers interact with each other. 	15		
<p>6. <u>Attendee and Exhibitor Advance Registration:</u> Attendees and exhibitors will register to attend the Ohio Safety Congress & Expo through the Awarded Contractor's web site beginning January 5, 2015. BWC will provide a link to the Vendor's web site from BWC's web site</p>			

<p>for this purpose. A separate registration process is required for attendees and exhibitors.</p> <p>Please review Appendix V for the Data Collection requirements for both Attendee and Exhibitor Advance Registration</p> <p>A. Data Collection: The field “BWC policy number” must be verified via a look-up table of valid policy numbers BWC will provide to the Vendor. The table of approximately 250,000 valid policy numbers will be provided. Additional records to append to the table (ranging in quantity from 500 to 5,000) will be provided every 14 days during advance registration. In addition, a unique identifier, such as a badge number or registration code, must be assigned to each attendee and exhibitor. All data fields collected via advance and onsite registration, including demographic questions, and BWC policy number must be included in the reports available to BWC during advance registration and at the conclusion of the event.</p> <p>B. Session Selection: Attendees must have the opportunity to select the sessions in which they prefer to attend. The display fields for this offering are identified in this bid document. Alerts for schedule conflicts and double-bookings must be provided. The following fields must be visible to allow session selection during advance registration:</p> <ol style="list-style-type: none"> 1. Session date and time 2. Session title 3. Session description and learning objectives 4. Session number 5. Skill level 6. Survey associated to tracking onsite activities <p>C. Confirmation of Registration: Vendor will propose a method for confirming immediate receipt of registration to the attendee and exhibitor in a timely and mutually agreed upon format. Confirmation must include, at minimum, contact information, session selections, instructional paragraphs provided by BWC, and password/login or instruction for updating the registration. BWC must be given an opportunity to provide and edit content.</p> <p>D. Update Capabilities: Vendor will propose a method by which advance registered attendees can view and edit their registration record. It is important to note that, under some circumstances, policy number and email address cannot be considered unique fields for the creation of a login name or password. Approximately 30 percent of attendees will not have a unique policy number; 20 percent will not have a unique email address. A combination of several fields may be considered in the creation of a unique login name.</p> <p>E. Badge Distribution: Vendor will propose a method for distributing badges to advance registrants, either in advance or onsite. It should be noted that pre-printing all advance badges for onsite pick-up has not proven to be an acceptable solution for this event due to the high quantity of badges and limited space for staging badges.</p> <p>F. Deliverables: Offeror must fully explain its capability for providing attendee and exhibitor advance registration services as listed above and below.</p> <ol style="list-style-type: none"> 1. Advance online registration process for event and educational sessions including mechanisms for creating a unique value (for example: badge number or registration code) for each registrant, preventing duplicate advance registrations, and validating BWC policy number against a policy list provided by BWC (appended bi-weekly) 	15		
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<ol style="list-style-type: none"> 2. Ability for registrant to select session attendance from a pre-determined list including functionality to prevent double-bookings and establish maximum seating capacity for educational session(s) 3. Ability for registrant to preview and update his/her registration information prior to the event 4. Method(s) of confirming advance registration to attendee and the ability to create a personalized agenda/itinerary, including session preferences, and update capabilities 5. Import or upload of VIP and staff registration data from BWC to the Contractor, including file formats, frequency, etc. 6. Method(s) of reporting advance registration activity to BWC, including the ability to capture all data required as outlined above 7. Ability to categorize attendees by badge type for the purpose of badge color and ribbon assignments (more than one category is necessary as an attendee may require multiple recognitions) 8. Schedule for routine data back-up and security of BWC data 9. Security measures and emergency procedures for protection of data and service interruption during advance registration 10. Although BWC does not currently charge admission for attendees to the Ohio Safety Congress and Expo, we may determine to do so in the future. Describe your solutions for collecting payment at the time of advance registration. Vendor must also comply with PCI DSS standards to ensure payment card data security. (BWC may determine to charge for show attendance at future events.) 			
<p>7. <u>On Site Event Registration:</u> Please review On Site Event Registration in Appendix V for estimated on-site registration activity during the event and the Event Badge Data Requirements. Nearly 70% of all registration activity occurs within the peak hours indicated in the On Site Registration Activity Table. The Vendor's ability to manage and control this flow, including advance and on-site registrants and badging, is critical to the success of the event. Maximum acceptable wait time for individuals registering onsite is 10 minutes; for advance-registered individuals is 5 minutes.</p> <p>BWC suggests eighteen data-entry terminals and badge printers are required to service peak demand for advance registered individuals and those who register onsite. Of the 18 data entry terminals,</p> <ul style="list-style-type: none"> 8 terminals for on-site registration 4 terminals for advance registration 4 terminals for exhibitor, speaker registration, and committee members 2 terminals for special requests, such as lost badges, spelling errors or other issues. <p>Advance registrants may be validated by proof of registration, such as a confirmation email with bar code, which can be scanned or exchanged for a badge.</p> <p>Registration for the event is free of charge, whereby approximately 20% of advance registrants choose not to attend the event. It is extremely important to BWC these non-participants be identified as such for attendance verification and reporting purposes. There is also the need to disallow multiple registrations by the same person in order to compile an accurate record of attendees. BWC may decide to charge a fee for registration at some point during the term of this contract.</p> <p>A. Requirements</p> <ol style="list-style-type: none"> 1. Onsite Registration Design and Layout: Offeror shall prepare and submit with its offer a suggested layout for the registration area at the event. Layout must be contained 	15		

<p>within a 45' x 100' column-free space and designed to maximize customer service and traffic flow. Layout and equipment must be sufficient to accommodate registrations during peak hours as previously provided in this bid request with a wait time of ten minutes or less during peak hours. Layout must identify quantity of data entry stations, badge pick-up stations, customer service area, etc. More than one layout may be submitted to cover a multitude of scenarios. It is understood that after award of the bid BWC will meet with the selected Vendor to further discuss event specifications and mutually revise the layout as needed,</p> <ol style="list-style-type: none"> 2. Equipment: Awarded Contractor will propose and provide the necessary number of data entry terminals, badge printers, associated servers, cables and equipment to support the registration operation at the event consistent with the registration activity described within this RFP. It should be noted that wireless equipment has not been effective within the convention facility. Only hard-wired solutions will be considered. BWC will consider any process by which attendees can manage some or all of the on-site registration process with minimal interaction with BWC staff, e.g. self-registration terminals, walk-up badge printing stations, etc. Please consider these options in preparation of your proposal. 3. Badging; Vendor must provide written description and sample badge with bold, easily readable fonts for the fields identified in this bid document. One- or two-color event logo should appear in the upper left corner of badge. Participant session schedule will print on reverse side of badge. Badges must be reviewed and approved by BWC. 4. Registration Personnel and Training: BWC will provide personnel to perform on-site registration data entry and badge distribution. Vendor will provide instruction, training and troubleshooting assistance to these personnel. 5. Contractor Personnel: A minimum of two (2) Contractor representatives are required to be present for the duration of the event for installation, testing, maintenance and removal of Contractor equipment.. BWC will provide personnel to perform on-site registration data entry and badge distribution. A designated Contractor representative must provide training to BWC personnel and be available 24 hours a day during the week of the event and capable of resolving equipment and programmatic malfunctions. This representative must be clearly identified to BWC prior to the event. 6. Attendance Verification: Contractor will propose a method for identifying advance registrants who choose not to attend the event. Additionally, mechanisms shall be in place to prevent duplicate registrations by the same person. 7. Financials: Registration for the Ohio Safety Congress & Expo is currently free of charge, therefore the Vendor is not required to accept monies or track financial activities related to registration for the event. However, it is possible that BWC may begin to charge a registration fee to participants during the term of this contract. In which case, Vendor must be prepared to provide advance and onsite functionality to do so. <p>B. Deliverables: Offeror shall propose how it will accomplish all items below subject to the information above.</p> <ol style="list-style-type: none"> 1. Onsite registration design and layout 2. Description of self-registration equipment and process (if applicable) 3. Capacity of equipment, i.e. computer models, features, number of registrants processed per hour, badges printed per hour 4. Detailed plan to manage the registration process during peak times with a wait time of 10 minutes or less 5. Ability to categorize attendees by badge type in multiple 			
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<p>categories, e.g. speaker, exhibitor, attendee, VIP, etc. and use these categories to assign appropriate ribbon for credentials</p> <ol style="list-style-type: none"> 6. Attendance verification procedures, including prevention of duplicate registrants and identification of advance registered no-shows 7. Sample pre-printed badge and available fonts with fields identified within this bid document 8. Badge type, e.g. bar code, magnetic stripe, etc., and benefits and costs of each method 9. Estimated time to install, test and deem functional all equipment prior to training BWC personnel 10. Training procedures for data entry personnel Require full functionality for staff training 11. Schedule for routine data back-up 12. Emergency and safety procedures in case of equipment malfunction and/or electrical failure 13. Process for providing lost badges, duplicate registrants, etc. 14. On-site storage needs 			
<p>8. <u>Educational Session Continuing Education Unit (CEU) Tracking and Reporting:</u> Approximately 170 to 175 educational sessions (up to 22 held concurrently) are offered at the Ohio Safety Congress & Expo. Attendance at these sessions can result in continuing education units (CEUs) for approximately fourteen professional certifications. BWC is required to track attendance at each educational session prior to awarding CEUs via a process that ensures attendees have attended the session in its entirety. This documentation is critical to BWC, as some CEUs result in discounted insurance premiums for attendees.</p> <p>The Anticipated Attendance Verification/CEU Activity table in Appendix V identifies the level of session tracking and CEU requests to expect at the event. The Anticipated CEU Types table in Appendix V identifies the types of CEU's offered. It is important to note that a maximum of 15 minutes is allotted between educational sessions. CEU demand at many sessions is quite significant, with hundreds of attendees requiring verification of their attendance at a single session. The Vendor's ability to facilitate quick movement of attendees between sessions is crucial to the event. Wireless scanning with real time updates has not been a successful solution due to the facility's wireless service and the time needed to scan each badge. Compounding the challenges of a quick and efficient attendance verification process, most session rooms also have multiple entry and exit points. A minimum of two badge scanners are required for each educational session, with some educational sessions and all general sessions requiring up to eight scanners.</p> <p>A. Usage and Confirmation of Attendance: Attendees receive verification of CEUs earned by receiving a printed certificate/letter. To minimize the use of paper, it is recommended that multiple sessions appear on the same certificate/letter. A sample of a previous certificate/letter is located in Appendix III of this RFP. Items required to appear on the printed certificate/letter include, but are not limited to:</p> <ol style="list-style-type: none"> 1. Event name 2. BWC name and contact information 3. Event date and location 4. Date, course number and title of each course attended, chronological order 5. Type and amount of credit earned 6. Narrative description of several credit types (dynamic based upon CEU types earned) 7. Attendee name, company and BWC policy number <p>In order to obtain CEU credit for a session the attendee must attend the full session and must complete and submit a session evaluation.</p>	<p>15</p>		

<p>B. Process: BWC is interested in a process that promotes attendee self-sufficiency, facilitates quick egress at the conclusion of sessions, and allows attendees to generate certificates/letters for proof of their attendance.</p> <p>C. Deliverables: Offeror must explain its capabilities associated with educational session continuing education unit tracking and reporting services, including but not limited to the items listed above and below.</p> <ol style="list-style-type: none"> 1. Verification of attendance at each educational session, e.g. confirmation tickets, scanner, etc. 2. Amount of time required to verify attendance for each attendee 3. Equipment requirements 4. Safeguards to protect the integrity of the accreditation process and to prevent the award of unearned CEUs 5. Methods to ensure only registered attendees who attend the event are able to receive confirmation of session attendance 6. Methods of providing confirmation/receipt to attendees at the conclusion of each session 7. Ability for attendees to generate their own certificate/letter 8. Ability to provide all required data on the certificate/letter, as described above, including paragraph required for each accreditation which appears only when that accreditation has been earned 9. Ability to incorporate functionality to require that a session evaluation be completed prior to receipt of CEU credit (see next section; <u>Session Evaluation Tracking Recording and Analysis</u>.) 10. Schedule for routine data back-up 11. Emergency procedures for equipment malfunction and/or electrical failure 12. On-site trouble-shooting and technical assistance 13. Pre-show and on-site training for BWC staff representatives on the accreditation process, materials, and/or equipment 14. Post-show reporting and data transfer to BWC 			
<p>9. <u>Session Evaluation Tracking, Recording and Analysis</u>: BWC maintains a highly rigorous CEU process. Attendees must complete a session evaluation to receive award of a CEU. Incorporating an evaluation component into the session tracking/continuing education process will fully comply with requirements put forth by BWC's accrediting agency.</p> <p>Evaluation questions are the same for all sessions, but the data reports must be individual to each session. Multiple choice evaluation questions are mandatory. Open-ended questions are optional. A sample session evaluation is located in the appendix section of this bid document.</p> <p>It is required that a session evaluation be completed for each session in which an attendee earns continuing education credit.</p> <p>A. Deliverables: Offeror must explain its capabilities associated with session evaluation tracking, recording and analysis including but not limited to the items listed below.</p> <ol style="list-style-type: none"> 1. Process by which session-specific feedback can be collected electronically; a requirement for receiving CEU documentation 2. Data reporting features and/or data transfer options for the export of data to BWC in a flat-file format 3. Post-show reporting of usage 4. Equipment requirements 5. Safeguards to protect the privacy of the customer when providing feedback 6. Emergency procedures in case of equipment malfunction and/or electrical failure (if applicable) 7. On-site trouble-shooting and technical assistance 8. Schedule for routine data back-up. 	<p>15</p>		

<p>10 <u>Session Wait List Management:</u> Offeror shall propose a solution for scenarios in which session interest exceeds session capacity.</p> <p>A. Deliverables:</p> <ol style="list-style-type: none"> 1. Ability for event management to designate a maximum number of seats per session. 2. Ability to display sessions as "Full" when registration meets the maximum number of designated seats per session. 3. Auto-notification of placement on a waiting list and auto notification of seating availability. 	15		
<p>11. <u>Event Data Access and Reporting:</u> Offeror shall provide BWC access to real-time registration data via a secure web-site with multiple reporting functions. All data elements collected must be presented in each report, and specifically, any field which is a unique value of the data represented in the report. For example, policy number and badge number (or registration code) must appear on each report which contains attendee data; session number must appear on each report which contains session data. Reports must be formatted for .pdf print and available via data export to MS Excel.</p> <p>A. Deliverables: Offeror shall submit a process by which BWC is provided 24-hour access to data for the following reports:</p> <ol style="list-style-type: none"> 1. Attendee Registration Report <ol style="list-style-type: none"> a. Hourly and daily registration activity for advance, onsite and final b. Registration type (attendee, exhibitor, committee member, etc.) c. Status: active/inactive/cancelled/no-show, etc. d. Demographics collected during registration such as Primary business of my organization, Number of people employed at my work location, Number of years in safety and health industry , Would you like to learn more about joining a programming committee, Permission to publicize email address/phone, etc. e. Date arrived onsite f. Duplicate registrations 2. Exhibitor Registration Report <ol style="list-style-type: none"> a. Hourly and daily registration activity for advance, onsite and final b. Registration type (attendee, exhibitor, committee member, etc.) c. Status: active/inactive/cancelled/no-show, etc. d. Date arrived onsite 3. Exhibitor Services Report <ol style="list-style-type: none"> a. Summary of materials and services provided to exhibitors throughout the event, such as quantity and order date of lead retrieval units b. Detail of quantity of leads collected by each exhibitor 4. Session Attendance Registration Report <ol style="list-style-type: none"> a. Summary of attendees registered for each session (advance) b. Detail of attendees registered for each session (advance) c. Summary of actual attendance at each session (final) d. Detail of actual attendance at each session (final) 5. Session Attendance CEU Tracking / Verification Report <ol style="list-style-type: none"> a. Summary of attendance at each session b. Detail of attendance at each session, including date/time stamp of attendance or alternative method for reporting attendance c. CEU credit by individual, including all data which appears on the CEU certificate /letter d. CEU credit by session, including all data which appears on the CEU certificate/letter 6. Session Evaluations Report 	15		

<ul style="list-style-type: none"> a. Summary of session evaluation responses by session number b. Detail of session evaluation responses by badge number (or registration code). 7. Financial reports; should BWC decide to collect a registration fee for attendees 8. Other Custom Reports as Requested 9. Follow-up technical assistance to facilitate data transfer and downloads. 			
<p>12. <u>Exhibitor Lead Retrieval Services:</u> Safety Congress exhibitors will use lead retrieval mechanisms to gather customer information quickly, concisely and affordably. This service must appeal to the budget of both large and small exhibitors. Approximately 200 businesses are expected to exhibit at the event, with approximately 35% using lead retrieval services. In a recent survey, cost was cited as the number one reason that exhibitors chose not to utilize lead retrieval services at the event.</p> <ul style="list-style-type: none"> A. Equipment: Up to two complimentary and customized lead retrieval units must be provided to BWC for use in show management booth. B. Communication: Lead retrieval order capability (.pdf and web-based) for the Ohio Safety Congress & Expo events must be provided to BWC by Jan. 14, 2015. To help educate exhibitors, it is important that literature, training, and on-site support be user-friendly and readily accessible before, during and after the event. C. Exhibitor Lead Retrieval Services will be a part of the technical evaluation of this proposal. However all costs associated with respect to lead retrieval services will be between the Contractor and individual exhibitors who choose to take advantage of such services. This being the case the cost of exhibitor lead retrieval services should be included in the offeror's technical proposal and are not a part of the Cost Proposal Evaluation of this RFP. However, DAS may consider proposed lead retrieval services costs as part of the overall technical evaluation for this mandatory requirement D. Deliverables: BWC desires a cost-effective solution utilizing technology for convenient, customer-friendly and cost effective lead retrieval services. Solutions must include but are not limited to: <ul style="list-style-type: none"> 1. Lead retrieval options including benefits and exhibitor rates for each method including payment methods for advance and on-site orders. 2. Description of lead retrieval device(s) 3. A description of the process by which the Offeror will advertise the availability of lead retrieval tools, e.g. telemarketing, literature, brochures, etc. and methods used to increase sales to exhibitors 4. Procedures for exhibitor pick-up/return of lead retrieval devices 5. Training for proper use of lead retrieval devices 6. Availability of technical assistance to exhibitors during move-in/show hours/move-out 7. Emergency procedures in case of equipment malfunction and/or electrical failure 8. Follow-up technical assistance to BWC and exhibitors to facilitate data transfer and access after the event 9. Reports available to BWC, i.e. activity per booth, leads per booth, number of exhibitors utilizing lead retrieval services, etc. 10. Offeror's lead retrieval services pricing to event exhibitors. 	15		

<p>13. <u>Exhibitor Task Management</u>: It is BWC's desire to provide a dedicated service center for exhibitors at the Ohio Safety Congress & Expo. BWC uses an in-house, custom application to receive and process exhibitor contracts and booth selection/assignment. The purpose of this site is to provide service to exhibitors after they complete the application process and receive a booth assignment.</p> <p>A. Deliverables: Offeror may propose multiple solutions to exhibitor task management services, in which case each solution must be fully outlined. Solution(s) shall include but not be limited to the items listed below.</p> <ol style="list-style-type: none"> 1. Ability for show management to provide links to contracted show management services such as expo decorator, booth staff badges, convention center utilizes, lead retrieval solutions, wireless services, etc. 2. Ability for exhibitors to upload documents and .jpg files for advertising purposes 3. Ability for exhibitors to review and edit product descriptions 4. Calendar of events with deadlines; auto-generated alerts when a deadline approaches and when a deadline has passed. 5. Ability to disable certain functionalities based upon pre-determined dates, e.g. turn-off product description review feature to accommodate print deadlines. 6. Upload logo/ad (on/off feature) multiple documents. 7. Update product description, company name, phone number, web address. 8. Ability for show management to import/upload exhibiting companies into module. 9. Ability for exhibitor to modify uploaded files or remove/replace uploaded files. 10. Notification to show management that uploaded materials have been modified. 	15		
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Total Technical Score: 1400

In this RFP, DAS asks for responses and submissions from Offerors, most of which represent components of the above criteria. While each criterion represents only a part of the total basis for a decision to award the Contract to an Offeror, a failure by an Offeror to make a required submission or meet a mandatory requirement will normally result in a rejection of that Offeror's Proposal. The value assigned above to each criterion is only a value used to determine which Proposal is the most advantageous to the State in relation to the other Proposals that DAS received.

Once the technical merits of a Proposal are evaluated, the costs of that Proposal will be considered. It is within DAS' discretion to wait to factor in a Proposal's cost until after the conclusion of any interviews, presentations, demonstrations or discussions. Also, before evaluating the technical merits of the Proposals, DAS may do an initial review of costs to determine if any Proposals should be rejected because of excessive cost. DAS may reconsider the excessiveness of any Proposal's cost at any time in the evaluation process.

2.6 PRESENTATIONS AND INTERVIEWS (if necessary): DAS may require top Offerors to be interviewed. Such interviews will provide an Offeror with an opportunity to present its Proposal and to ensure a mutual understanding of the Proposal's content. This will also allow DAS and the Agency an opportunity to test or probe the professionalism, qualifications, skills, and work knowledge of the proposed candidates. The interviews will be scheduled at the convenience and discretion of DAS and the Agency. DAS or the Agency may record any presentations and interviews. The one (1) to three (3) highest scoring Offerors; but no more than the top three (3) may be required to participate. Interviews will be scheduled to be held in Columbus, Ohio at the vendor's expense, if applicable.

Presentations, Interviews, Demonstrations: Based upon the Proposals Received, DAS may determine a need for face-to-face meeting(s) with one or more Offerors. If face to face meetings are scheduled, the point values below will be assigned. If DAS determines no need for meetings the point values below will not be used.	Weight	Rating (0 to 5)	Extended Score
1. Oral Presentation and Question and Answer Session (if applicable)	15		
2. Product or Software/Website Demonstration (if applicable)	15		

Total Presentation Score: 150

2.7 COST PROPOSAL POINTS: DAS will use the information the Offeror submits on the Cost Summary Form to calculate Cost Proposal Points. DAS will calculate the Offeror's Cost Proposal points after the Offeror's total technical points are determined, using the following method:

Cost points = (lowest Offeror's cost/Offeror's cost) x Maximum Allowable Cost Points as indicated in the "Scoring Breakdown" table. "Cost" = total fixed and variable costs identified in the Cost Summary section of Offeror's Proposal. In this method, the lowest cost proposed will receive the maximum allowable points.

The number of points assigned to the cost evaluation will be prorated, with the lowest accepted Cost Proposal given the maximum number of points possible for this criterion. Other acceptable Cost Proposals will be scored as the ratio of the lowest Cost Proposal to the Proposal being scored, multiplied by the maximum number of points possible for this criterion.

An example for calculating cost points, where Maximum Allowable Cost Points Value = 60 points, is the scenario where Offeror X has proposed a cost of \$100.00. Offeror Y has proposed a cost of \$110.00 and Offeror Z has proposed a cost of \$120.00. Offeror X, having the lowest cost, would get the maximum 60 cost points. Offeror Y's cost points would be calculated as \$100.00 (Offeror X's cost) divided by \$110.00 (Offeror Y's cost) equals 0.909 times 60 maximum points, or a total of 54.5 points. Offeror Z's cost points would be calculated as \$100.00 (Offeror X's cost) divided by \$120.00 (Offeror Z's cost) equals 0.833 times 60 maximum points, or a total of 50 points.

Cost Score: _____

2.8 FINAL STAGES OF EVALUATION: The Offeror with the highest point total from all phases of the evaluation (Technical Points + Cost Points) will be recommended for the next phase of the evaluation.

Technical Score: _____ + Cost Score: _____ = Total Score: _____

If DAS finds that one or more Proposals should be given further consideration, DAS may select one or more of the highest-ranking Proposals to move to the Presentation and Interview phase. DAS may alternatively choose to bypass any or all subsequent phases and make an award based solely on the Proposal evaluation phase.

2.9 REJECTION OF PROPOSALS: DAS may reject any Proposal that is not in the required format, does not address all the requirements of this RFP, or that DAS believes is excessive in price or otherwise not in the interest of the State to consider or to accept. In addition, DAS may cancel this RFP, reject all the Proposals, and seek to do the Work through a new RFP or by other means.

3.0 COST SUMMARY

- 3.1 SUBMISSION The Cost Summary shall be submitted with the Proposal (under separate cover labeled as the Cost Proposal). All prices, costs, and conditions outlined in the Proposal shall remain fixed and valid for acceptance for 120 days, starting on the due date for Proposals. No price change shall be effective without prior written consent from DAS, Office of Procurement Services.

The Offeror's total cost for the entire Work must be represented as firm, fixed costs and variable costs not to exceed the maximum offered. Event optional costs will not be evaluated as a part of the cost proposal. All costs for furnishing the services must be included in the Cost Proposal.

- 3.2 THE OFFEROR'S FEE STRUCTURE The Contractor will be paid as proposed on the Cost Summary after the Agency approves the receipt of product(s)/services and continued completion of all deliverables. All costs must be in U.S. Dollars.

- 3.3 REIMBURSABLE EXPENSES None; there will be no additional reimbursement for travel or other related expenses. The State will not be responsible for any costs not identified.

- 3.4 BILL TO ADDRESS Invoices are to be sent to:

BWC Invoice Processing
Ohio Shared Services
P.O. Box 182880
Columbus, OH 43218-2880

Or via email to: invoices@ohio.gov as a pdf file.

EVENT: LOGISTICS AND TRADE SHOW MANAGEMENT SOFTWARE AND SERVICES FOR THE OHIO SAFETY CONGRESS AND EXPO
 CSP903015
 UNSPSC CATEGORY CODE: 80141900, 80141607

OFFEROR: _____

Event Fixed Costs: Offeror shall complete the attached Cost Summary Table. Provide separate costs for developing the activity and administering the activity during the Ohio Safety Congress and Expo. If your company has no costs associated with developing the requirement, indicate \$ 0.00 on the development cost line.

Event Fixed Costs		
Description	2015 Cost	2016 Cost
Event Program Committee Management Services	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Event Speaker / Presenter Submission and Tracking Service	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Event Speaker Management	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Event Website and Development	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Event Communication and Marketing Services	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Attendee and Exhibitor Advance Registration	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
On-Site Event Registration	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Educational Session Continuing Education Unit (CEU) Tracking and Reporting	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Session Evaluation Tracking, Recording and Analysis	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Session Wait List Management	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Event Data Access and Reporting	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Exhibitor Lead Retrieval Services	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____
Exhibitor Task Management	Development Cost \$ _____ Event Cost \$ _____	Event Cost \$ _____

Event Optional Services Costs - See Proposal Appendix I on pages 25 and 26 (These costs will not be a part of the Proposal Technical or Cost Evaluation. Optional services however may be considered by BWC after award of a contract subject to the availability of funding).	
Description	2015 Cost
Event Mobile Device Application	\$
Prospectus and Interactive Floor Plan	\$
Online Exhibitor Booth Sales Support	\$
Contractor Website Optimization for Mobile Browsing	\$
Attendee Networking and Collaboration	\$
Attendee and Exhibitor Networking	\$
Other Optional Services as Offered	\$
	\$
	\$
	\$

All Offerors who seek to be considered for a contract award must submit the above information in the format specified. The Original Cost Summary must be included in a separate, sealed envelope/package labeled on the exterior as "Cost Proposal" with the RFP Number and due date.

4.0 AWARD OF THE CONTRACT

- 4.1 CONTRACT AWARD: DAS intends to award the Contract based on the schedule in the RFP, if DAS decides the Work is in the best interests of the State and has not changed the award date.

DAS expects the Contractor to commence the Work upon receipt of a state issued purchase order. If DAS awards a Contract pursuant to this RFP and the Contractor is unable or unwilling to commence the Work, DAS reserves the right to cancel the Contract and return to the original RFP process and evaluate any remaining Offeror's Proposals reasonably susceptible of being selected for award of the Contract. The evaluation process will resume with the next highest ranking, viable Proposal.

- 4.2 CONTRACT: If this RFP results in a Contract award, the Contract will consist of this RFP including the Terms and Conditions, all forms, written addenda to this RFP, the Contractor's accepted Proposal and written authorized addenda to the Contractor's Proposal. It will also include any materials incorporated by reference in the above documents and any purchase orders and amendments issued under the Contract. The general terms and conditions for the Contract are contained in the following link:

<https://procure.ohio.gov/Zip/5.3%20Terms%20and%20Conditions.pdf>

If there are conflicting provisions between the documents that make up the Contract, the order of precedence for the documents is as follows:

1. The one-page Contract Signature Page, Form 5.2.2
2. The RFP, as addended, including the Terms and Conditions;
3. The documents and materials incorporated by reference in the RFP;
4. The Executive Order. EO2011-12K incorporated by reference in the RFP;
5. The Contractor's Proposal, as amended, clarified, and accepted by the State; and
6. The documents and materials incorporated by reference in the Contractor's Proposal.

Notwithstanding the order listed above, amendments issued after the Contract is executed may expressly change the provisions of the Contract. If they do so expressly, then the most recent amendment will take precedence over anything else that is part of the Contract.

- 4.3 ECONOMIC PRICE ADJUSTMENT: The Contract prices(s) will remain firm throughout the initial term of the Contract. Thereafter, prior to Contract renewal, the Contractor may submit a request to adjust their price(s) to be effective on the effective date of the Contract's renewal. No price adjustment will be permitted prior to the effective date; on purchase orders that already being processed; or on purchase orders that have been filled.

Price increases must be supported by a general price increase in the cost of the materials/services rendered due to documented increases in the cost of related materials/services. Detailed documentation, to include a comparison list of the Contract items and proposed price adjustments must be submitted to support the requested adjustment. Supportive documentation should include, but is not limited to: copies of the old and the current price lists or similar documents which indicate the original base cost of the product to the Contractor and the corresponding adjustment, and/or copies of correspondence sent by the Contractor's supplier on the supplier's letterhead, which contain the above price information and explains the source of the adjusted costs in such areas as raw materials, freight, fuel or labor, etc.

Should there be a decrease in the cost of the finished product due to a general decline in the market or some other factor, the Contractor is responsible to notify DAS immediately. The price decrease adjustment will be incorporated into the Contract and will be effective on all purchase orders issued after the effective date of the decrease. If the price decrease is a temporary decrease, such should be noted on the invoice. In the event that the temporary decrease is revoked, the Contract pricing will be returned to the pricing in effect prior to the temporary decrease. Failure to comply with this provision will be considered as a default and will be subject to the Suspension and Termination section contained herein.

- 4.4 SPECIAL PROVISIONS: There are no Special Provisions

5.0 LINKS: To be applicable to all Proposals and subsequent award(s), including sections named below.

5.1 Instructions

- 5.1.1 Proposal Instructions
- 5.1.2 Evaluation of Proposals
- 5.1.3 Proposal Format & Documentation Required

5.2 Forms

- 5.2.1 Offeror Required Information
- 5.2.2 Contract Signature Page
- 5.2.3 Offeror Profile
- 5.2.4 Offeror Prior Projects
- 5.2.5 Offeror's Candidate References
- 5.2.6 Offeror's Candidate Education, Training, Experience
- 5.2.7 Offeror Performance Form
- 5.2.8 Contractor/Subcontractor Affirmation and Disclosure

5.3 Terms and Conditions

- 5.3.1 Performance and Payment
- 5.3.2 Work and Contract Administration
- 5.3.3 Ownership & Handling of Intellectual Property & Confidential Information
- 5.3.4 Representations, Warranties and Liabilities
- 5.3.5 Acceptance and Maintenance
- 5.3.6 Construction
- 5.3.7 Law & Courts

5.4 ADDITIONAL RESOURCES

EOD Reporting	http://eodreporting.oit.ohio.gov/searchEODReporting.aspx
Office of Budget and Management	http://obm.ohio.gov/LandingPages/Vendor/default.aspx
Office of Procurement Services	http://procure.ohio.gov/proc/index.asp
Ohio Shared Services	http://www.ohiosharedservices.ohio.gov/Home.aspx
Ohio Business Gateway	http://business.ohio.gov/
Ohio Secretary of State	http://www.sos.state.oh.us/SOS/Businesses.aspx

All links are subject to change in accordance with state of Ohio laws, Ohio Revised Code, Ohio Administrative Code, Executive Orders or any other updates issued by the state of Ohio, Department of Administrative Services, and the Office of Procurement Services. It is the Offeror's responsibility to read and be aware of any changes, corrections, updates or deletions to any information included in the link(s) above.

- 6.0 Guide for Proposal Submission This guide outlines steps for submission of a Proposal in response to the advertised Request for Proposal. This guide does not contain the complete instructions for preparing and submitting a Proposal and anything stated herein shall not be considered a term or condition of the Contract. The complete instructions can be found in section 5.1.1, Proposal Instructions.
- 6.1 _____ Read the entire document, including all Web site links. Note critical items such as: Mandatory Requirements; goods or services required, submittal date and time; number of copies to submit; contract requirements; reporting requirements; minimum qualifications; read and understand the terms and conditions.
- 6.2 _____ Take advantage of the “question and answer” period specified in the schedule of events. Questions must be submitted on-line in the Inquiry Process as explained in the Instructions. See section 5.1.1, Proposal Instructions.
- 6.3 _____ Follow the format required in the RFP Instructions when preparing the response in chronological order. Provide point-by-point responses to all sections in a clear and concise manner. See section 5.1.3, Proposal Format & Documentation Required.
- 6.4 _____ Use the forms provided; i.e. Signed RFP Cover Page, Offeror Required Information, Contract Signature Page, Offeror Profile and Prior Projects, Key Personnel forms, Disclosure Form, and Cost Summary Form, See section 5.2, Forms.
- 6.5 _____ Provide complete answers/descriptions. Do not assume the State or any evaluation committee member will know what the Offeror’s capabilities are or what items/services the Offeror can provide, even if previously contracted with the State. The Proposals are evaluated based solely on the information and materials provided in the Offeror’s response.
- 6.6 _____ Check the State’s Web site for RFP addenda. It is the responsibility of the Offeror to be aware of additional information posted on the Web.
- 6.7 _____ The following documents may be submitted with the Proposal or within five (5) business days of request from the Office of Procurement Services: Affirmative Action and proof of insurance. No award will be made without this documentation. Offeror’s Proposal may be eliminated from further consideration upon failure to submit within the specified time frame
- 6.8 _____ If not a current vendor of the state of Ohio, the Offeror will download both the W-9 and Vendor Information Form and submit to Ohio Shared Services (OSS) at vendor@ohio.gov. See section 5.4, Additional Resources.
- 6.9 _____ Review and read the RFP Document again to make sure that you have addressed all requirements. Read and understand Supplements, if applicable. Offeror’s original response and the requested copies must be identical and be complete. The copies are provided to the evaluation committee members and used to score the response.
- 6.10 _____ Offeror’s response must be submitted on time. Late Proposals are never accepted. Make sure the response is labeled on the exterior of the envelope/package with the RFP# and due date, and whether the packet is for the Technical Proposal or the Cost Proposal. Do not place the Cost Proposal in the Technical Proposal.

APPENDIX I – OPTIONAL SERVICES

Optional services, if offered will not be a part of the proposal technical or cost evaluations. As such optional services if offered should include a complete description of the Offeror's solution as well as all costs associated with the service. Listed below are some of the optional services contractors have offered in the past with the characteristics of each which may be desirable to BWC.

How to Propose Optional Services: If the Offeror determines to offer Optional Services as part of its proposal package, Optional Services shall be submitted in a separate sealed envelope/package, clearly identified on the exterior as "OPTIONAL SERVICES" with CSP903015 and due date, submitted as part of the overall proposal package.

Optional Service - Mobile Device Event Application: The Ohio Safety Congress & Expo first introduced a mobile application three years ago to help digital-savvy attendees navigate the conference while hopefully decreasing the amount of printed event guides that were ordered. Over the three years, the application has grown in popularity, but not to the point where BWC is reducing inventory. The mobile app is a mirror image of the event guide and includes session information, room locations, maps of the facility, exhibitors and booth numbers, special features BWC offers, information about hotels, brief surveys, and an overview of the conference.

Characteristics: Please provide any associated costs, as it pertains to your session tracking services, including but not limited to the items listed above and below. Offeror may propose multiple solutions to mobile application services, in which case each solution must be fully outlined and include all associated direct and indirect costs.

1. Native application
2. Ability to make updates in real time
3. Include custom lists to feature highlights of the conference
4. Have an interactive component where users can network with each other
5. Gamification
6. Include survey options to poll customer feedback
7. Be able to download reports of number of downloads, how many downloads per device, when downloads occurred
8. Include push notifications to attendees regarding last minute changes
9. Option to upload handouts, maps of the facility and other pdfs
10. Option to link to external webpages and/or forms
11. Ability to live poll an audience
12. Ability to answer customer questions expeditiously

Optional Service - Exhibitor Prospectus and Interactive Floor Plan: Six to eight months before the show, the BWC releases an exhibitor prospectus to the public and specifically to past exhibitors. The prospectus includes several important pieces of information, such as dates of the show, expo hours, background on the audience, booth and sponsorships pricing and descriptions, last year's exhibiting companies and a current floor plan. The floor plan is created by BWC's expo contractor and is currently not interactive.

Characteristics: Please provide any associated costs, as they pertain to event prospectus and floor plan, including but not limited to the items listed above and below. Offeror may propose multiple solutions to prospectus and floor plan services, in which case each solution must be fully outlined and include all associated direct and indirect costs.

1. See which booths are available
2. Booth that are purchased are immediately reflected on the floor plan
3. Email confirmation is sent
4. Real-time exhibitor list showing all exhibitors participating in the tradeshow
5. Search capabilities so customers can find specific vendors
6. Show pricing and discounts such as early bird rates
7. Have discount rate automatically expire and switch to higher prices
8. Ability to send exhibitors invoice for purchase of booth space
9. An interactive floor plan option with logo links and an exhibitor legend on the side
10. Preloaded/prescheduled email blast reminders of deadlines to whom they apply
11. Links page to list other appropriate websites

APPENDIX I – OPTIONAL SERVICES (Continued)**Optional Service - Online Exhibitor Booth Sales Support:**

Characteristics: Please provide any associated costs, as it pertains to your exhibitor booth sales and support capability, including but not limited to the items listed above and below. Offeror may propose multiple solutions to exhibitor booth sales support, in which case each solution must be fully outlined and include all associated direct and indirect costs:

1. Exhibitor booth space applications received by Ohio Safety Congress (OSC) staff submitted to vendor for account creation and application information upload for later payment processing
2. Create and distribute account passwords for applicants for ecommerce access; profile is only information that can be edited online by account holder, order information can only be edited by OSC staff
3. Exhibitor accounts to have access for booth space and advertising/promotional sales processing online. Credit cards can be utilized online and checks can be processed
4. Approved exhibitor applications will receive a service order kit with links to order forms to third party service vendors (e.g. Event decorator, convention center utilities, AV services) with payment processing capabilities
5. Process onsite service orders through exhibitor accounts for proper tracking and appropriate reports
6. Creation and distribution of sales confirmation letters
7. Exhibitor booth space payments to be direct deposited into Ohio Safety Congress account of assigned banking institution
8. Ability to process session sponsorship and general advertising payments

Optional Service - Mobile Event Web Site: Functionality what would optimize the Contractor's website for mobile device browsing.

Optional Service - Attendee Networking and Collaboration: Tools and services that can enhance the event experience by connecting those attendees who have similar interests, experience, education or needs.

Optional Service - Attendee and Exhibitor Networking: Tools and services that facilitate business-to-business interaction between exhibitors and attendees with common interests in the products and/or services marketed and/or sold by the exhibitor.

Optional Service - Miscellaneous Services: Please feel free to include in your proposal any services that may be helpful in the production of the Ohio Safety Congress & Expo. Please provide associated costs as it pertains to each optional service. Offeror may propose multiple services, in which case each service must be fully outlined and include all associated direct and indirect costs. Examples include customizable event web site, mobile applications, abstract review and selection tools, marketing solutions or other services.

APPENDIX II – SAMPLE EVENT SCHEDULE

OSC	Monday	Tuesday	Wednesday	Thursday	Friday
7:00 AM					
7:15 AM					
7:30 AM					
7:45 AM					
8:00 AM					
8:15 AM					
8:30 AM					
8:45 AM					
9:00 AM	9:00	9:00	8:00	8:00	8:00
9:15 AM			(10) Ed sessions	(10) Ed sessions	(3) Ed sessions
9:30 AM					
9:45 AM					
10:00 AM			Opening session	Opening session	(3) Ed sessions
10:15 AM					
10:30 AM					
10:45 AM			(10) Ed sessions	(10) Ed sessions	(3) Ed sessions
11:00 AM					
11:15 AM			(10) Ed sessions	(12) Ed sessions	(3) Ed sessions
11:30 AM	Registration install	Full day sessions			
11:45 AM			Expo	Expo	Registration
12:00 PM			On-Your-Own-Lunch	On-Your-Own-Lunch	On-Your-Own-Lunch
12:15 PM		Exhibitor install			
12:30 PM					
12:45 PM					
1:00 PM					
1:15 PM			(10) Ed sessions	(10) Ed sessions	(3) Ed sessions
1:30 PM					
1:45 PM			(10) Ed sessions	(12) Ed sessions	(3) Ed sessions
2:00 PM					
2:15 PM					
2:30 PM		Liaison Mtg	(10) Ed sessions	(12) Ed sessions	(3) Ed sessions
2:45 PM					
3:00 PM	2:30		(10) Ed sessions	(12) Ed sessions	(3) Ed sessions
3:15 PM					
3:30 PM	Reg Training #1		General session	Exhibitor dismantle	
3:45 PM					
4:00 PM					
4:15 PM					
4:30 PM					
4:45 PM					
5:00 PM					
5:15 PM					
5:30 PM					
5:45 PM					
6:00 PM					
7:00 PM					
8:00 PM					

APPENDIX III – SAMPLE CEU CERTIFICATE / LETTER

This certifies attendance by

THOMAS SMITH

ABC MFG. CO.

BWC Policy No. 123456

at the

Ohio Safety Congress & Expo

Greater Columbus Convention Center

Session	Date	Session No.	Credit
<<MERGE FIELD>>	<<MERGE FIELD>>	<<MF>>	<<MERGE FIELD>>
Safety management during the Gulf oil spill cleanup	March 27	#918	0.1 CEU; 1 HR; 2.5 CLE; 2.5 WW/DW; 2.5 SAN
The Latest Drug Trends That Impact Your Workplace	March 26	#183	0.1 CEU ; 1 HR; 1 RCH; 1 CPE

Attendance credits (CEU) – Continuing education units are awarded based upon the guidelines of the International Association for Continuing Education and Training (IACET). The Ohio Bureau of Workers' Compensation has been accredited as an IACET Authorized Provider (1004768). For tracking purposes, 60 minutes of education content is awarded 0.1 CEU. Please contact your accrediting organization to verify their acceptance of IACET CEUs.

100-Percent EM Cap and One Claim programs (CEU) – Participants can use Safety Congress attendance to meet program training requirements for program year 2013 or 2014, but not both years. Present this documentation to your BWC employer service specialist as verification of your attendance. For tracking purposes, 60 minutes of education content is awarded 0.1 CEU.

Group Rating and Industry-Specific Safety Program (CEU) – Participants can use Safety Congress attendance for two hours of training credit for Group Rating and three hours of training credit, equal to one activity credit, for the Industry-Specific Safety Program. For tracking purposes, 60 minutes of education content is awarded 0.1 CEU.

Safety council (CEU) – BWC recognizes safety congress attendance for a maximum of one external training credit, equivalent to 0.1 CEU, toward the Safety Council Rebate program. Safety council participants must submit this documentation to the local safety council by June 30, 2014 to ensure safety congress attendance is recognized as external training credit.

Commissions for rehabilitation professionals (CDMS, CRC) – BWC is a frequent sponsor of pre-approved continuing education for rehabilitation professionals. The appropriate commissions have authorized these sessions as qualified for certified disability management specialists (CDMS) under authorization number 59968329209 and certified rehabilitation counselors (CRC) 5996891087.

Commission for Case Manager Certification (CCM) – This program has been pre-approved by The Commission for Case Manager Certification to provide continuing education (CE) credit to CCM® board certified case managers. The course is approved for up to eight CE contact hours; activity code M0000465; approval number 20139130. To claim these CEs, log into your CE Center at www.ccmcertification.org.

Registered nurse (RN) – The Ohio Bureau of Workers' Compensation (OH-188/01-01-2016) is an approved provider of continuing nursing education by the Ohio Nurses Association (OBN-001-91), an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation.

Human resource (HR) – This program has been approved for up to 13.5 (general) recertification credit hours toward PHR, SPHR and GPHR recertification through the Human Resource Certification Institute. For more information about certification or recertification, please visit the HR Certification Institute website at www.hrci.org. Use of the HR Certification Institute seal is not an endorsement by the HR Certification Institute of the quality of the program. It means that this program has met the HR Certification Institute's criteria to be pre-approved for recertification credit.

Nursing home administrators (BELTSS, formerly BENHA) – BWC has been approved as a certified provider of the Board of Executives of Long-term Services and Supports credits for select sessions. These credits satisfy license renewal continuing education requirements for nursing home administrators.

Attorney, judge and legal professionals (CLE) – This course has been approved by the Supreme Court of Ohio Commission on continuing legal education for up to seven total CLE hours. BWC will report legal credits to the Ohio Supreme Court by April 25, 2014. The activity code for this CLE is available at the conclusion of your attendance at safety congress' CLE sessions.

Safety professional and industrial hygienist (CEU) – IACET CEUs are accepted by many safety boards and certification organizations. The American Board of Industrial Hygiene has previously awarded CM credit for this event. The current event can be claimed for CM credit.

Chemical dependency (RCH) – Ohio Mental Health and Addiction Services is approved by the Ohio Chemical Dependency Professionals Board to offer recognized clock hours for chemical dependency counselors and prevention professionals. The provider approval number is 09-1315-64PVN-PR for one RCH per session.

Sanitarian (SAN) – BWC's Division of Safety & Hygiene – Training Center is an authorized sanitarian training center and many OSC14 sessions offer continuing education credits to maintain a registered sanitarian license.

Drinking water and waste water plant operators (EPA) – BWC's Division of Safety & Hygiene – Training Center, is an approved contact hour training provider by the State of Ohio Environmental Protection Agency offering credits to drinking water and waste water plant operators.

- BWC discount program credit
- Case management
- Chemical dependency
- Disability management
- EMS/first responder
- EPA wastewater operator
- Human resource
- Industrial hygiene
- Legal
- Nursing
- Nursing home administrator
- Rehabilitation counselor
- Safety council
- Sanitarian
- Social work/counselor
- Other

APPENDIX IV – SAMPLE OHIO SAFETY CONGRESS SESSION EVALUATION**EDUCATIONAL SESSION EVALUATION**

This questionnaire is part of our effort to evaluate this educational session.

By completing this form, you will help us determine how well the session met its objectives.

Please circle your responses using the evaluation rating scale as follows:

1 Poor, 2 Fair; 3 Satisfactory; 4 Good; 5 Excellent

	Evaluation Rating
Overall Effectiveness	
1. How effective overall was the presentation for this session?	1 2 3 4 5
Learning Objective	
2. How effective was the presentation in providing an understanding of the topic to increase your effectiveness?	1 2 3 4 5
3. I am able to apply the information covered in this session?	1 2 3 4 5
Instructional Materials	
4. How would you rate the effectiveness of the session materials?	1 2 3 4 5
Presenter(s)	
5. The presenter(s) was knowledgeable about this subject?	1 2 3 4 5
6. Did they address your questions and provide feedback to make sure learning occurred?	1 2 3 4 5
Implementation	
7. What was the most useful aspect of this session for you?	
8. How will you use this information in your workplace?	
Suggestions	
9. What topics or presenters would you suggest for future safety congress events?	
Continuing Education	
10. What, if any, type of continuing education credits from this session will you use? Select all that apply.	

APPENDIX V – EVENT DATA COMPONENT REQUIREMENTS**EVENT PROGRAM COMMITTEE DATA COLLECTION REQUIREMENTS**

Field	Data type	Required	Unique	Comments
Committee Name	Alpha	Yes	No	Drop down list of program committees
Position	Alpha	Yes	No	Liaison, Co-Liaison, Chair, First Vice Chair, Second Vice Chair, Third Vice Chair, Member
First Name	Alpha	Yes	No	
Last Name	Alpha	Yes	No	
Nickname	Alpha	No	No	
Company	Alpha numeric	Yes	No	Auto-populate via look-up table of 250,000 valid policy numbers provided by BWC; can be edited by the attendee
Working Title	Alpha numeric	No	No	
Workers' Compensation Policy Number	Numeric, 2 to 9 digits	Yes	No	Verified via look-up table of 250,000 valid policy numbers provided by BWC; can be viewed, but not edited by the attendee
Street Address	Alpha numeric	Yes	No	
City	Alpha	Yes	No	
State	Alpha	Yes	No	
Zip+4	Alpha numeric	Yes	No	5 digit required, + 4 optional; capable of accepting Canadian postal codes
Country	Alpha	No	No	Default to United States
Phone	Numeric	Yes	No	
Cell Phone	Numeric	No	No	
E-mail	Alpha numeric	Yes	No	
Year Joined	Numeric	Yes	No	
Correspondence Tracking	Numeric	Yes	No	
Comments	Alpha Numeric	Yes	No	

APPENDIX V – EVENT DATA COMPONENT REQUIREMENTS (CONTINUED)**EVENT SPEAKER / PRESENTER DATA COLLECTION REQUIREMENTS**

Field	Data type	Required	Unique	Comments
Previously Contacted by a Program Committee	Yes/No	Yes	No	A yes answer disqualifies the participant from the survey
Session Form	Multiple choice	Yes	No	5 choices
Session Title	Alpha	Yes	No	100 character max
Session Description	Alpha	Yes	No	500 character max
Learning Objectives	Alpha	Yes	No	2 to 3 objectives per submission
Continuing Education possibilities	Multiple choice, all that apply	Yes	No	14 choices
Audience Skill Level	Multiple choice	Yes	No	Basic, Intermediate, Advance
Primary industries for the session	Multiple choice, all that apply	Yes	No	22 choices
First Name	Alpha	Yes	No	
Last Name	Alpha	Yes	No	
Company	Alpha numeric	Yes	No	Auto-populate via look-up table of 250,000 valid policy numbers provided by BWC; can be edited by the attendee
Working Title	Alpha numeric	No	No	
Street Address	Alpha numeric	Yes	No	
City	Alpha	Yes	No	
State	Alpha	Yes	No	
Zip+4	Alpha numeric	Yes	No	5 digit required, + 4 optional; capable of accepting Canadian postal codes
Country	Alpha	No	No	Default to United States
Phone	Numeric	Yes	No	
Cell Phone	Numeric	No	No	
E-mail	Alpha numeric	Yes	No	
Relevant Work Experience	Alpha or Upload	Yes	No	Enter information or upload bio/resume
No Compensation Given to Speakers	Yes/No	Yes	No	No answer disqualifies participant from survey
Session Must be Strictly Educational	Yes/No	Yes	No	No answer disqualifies participant from survey
Conflict of Interest	Yes/No	Yes	No	Yes answer must be explained
Additional Presenters	Yes/No	Yes	No	If yes, must gather same information as first presenter
Correspondence Tracking	Numeric	Yes	No	
Comments	Alpha Numeric	Yes		

APPENDIX V – EVENT DATA COMPONENT REQUIREMENTS (CONTINUED)**ATTENDEE REGISTRATION DATA COLLECTION REQUIREMENTS**

Field	Data Type	Required	Unique	Comments
First Name	Alpha	Yes	No	
Last Name	Alpha	Yes	No	
Company	Alpha numeric	Yes	No	Auto-populate via look-up table of 250,000 valid policy numbers provided by BWC; can be edited by the attendee
Working Title	Alpha numeric	No	No	
Workers' Compensation Policy Number	Numeric, 2 to 9 digits	Yes	No	Verified via look-up table of 250,000 valid policy numbers provided by BWC; can be viewed, but not edited by the attendee
Street Address	Alpha numeric	Yes	No	
City	Alpha	Yes	No	
State	Alpha	Yes	No	
Zip+4	Alpha numeric	Yes	No	5 digit required, + 4 optional; capable of accepting Canadian postal codes
Country	Alpha	No	No	Default to United States
Phone	Numeric	No	No	
Permission to publicize phone	Yes/No	Yes	No	
E-mail	Alpha numeric	Yes	No	
Permission to publicize email address	Yes/No	Yes	No	
Badge type	Multiple choice, all that apply	Yes	Yes	Attendee, committee member, speaker, press, VIP, BWC employee
Previous attendee	Yes/No	Yes		
Primary business of my organization	Multiple choice, select one	Yes		17 choices
Number of people employed at my work location	Multiple choice, select one	Yes		7 choices
Number of years in safety and health industry	Multiple choice, select one	Yes		5 choices
Identify the position which best describes your role	Multiple choice, select one	Yes		14 choices
My role in the purchase of safety and health products for my business	Multiple choice, select one	Yes		5 choices
Number of safety congress events attended in previous years	Multiple choice, select one	Yes		5 choices
Would you like to learn more about joining a programming committee	Yes/No	Yes		Default to no
Session selections -- general and educational sessions (see below))	Multiple choice, all that apply	No		Schedule conflict alerts or conflict resolution capabilities

APPENDIX V – EVENT DATA COMPONENT REQUIREMENTS (CONTINUED)**EXHIBITOR REGISTRATION DATA COLLECTION REQUIREMENTS**

Field	Data Type	Required	Comments
Federal tax identification number	Numeric, 9 digits	Yes	XX-XXXXXXX
Company	Alpha numeric	Yes	
Workers' Compensation Policy Number	Numeric, 2 to 9 digits	No	
Street Address	Alpha numeric	Yes	
City	Alpha	Yes	
State	Alpha	Yes	
Zip+4	Alpha numeric	Yes	5 digit required, + 4 optional; capable of accepting Canadian postal codes
Country	Alpha	No	Default to United States
First Name	Alpha	Yes	For each booth staff
Last Name	Alpha	Yes	For each booth staff
Working Title	Alpha	No	For each booth staff
Phone	Alpha	No	For each booth staff
Permission to publicize phone	Yes/No	Yes	For each booth staff
E-mail	Alpha	Yes / No	Required for main contact / Not required for each booth staff
Permission to publicize email	Yes/No	Yes	For each booth staff
Session selections (general and educational sessions)			To avoid confusion among exhibitors, session listings and selections should not be made available to exhibitors during exhibitor registration/badge request process

ONSITE REGISTRATION ANTICIPATED ACTIVITY TABLE

Event Day	On-site Registration	Advance Registration Validation	Total Registration	Peak Hours
Tuesday	170	1400	1570	8 to 9 a.m.
Wednesday	475	2200	2675	7 to 9:45 a.m.
Thursday	150	775	925	7:30 to 9:30 a.m.
Maximum acceptable wait time for badging	10 minutes	5 minutes	--	--

APPENDIX V – EVENT DATA COMPONENT REQUIREMENTS (CONTINUED)**EVENT BADGES – THE FOLLOWING FIELDS MUST APPEAR ON EACH BADGE**

Field	Data Type	Required	Comments
Badge number or registration code	Numeric	Yes	Unique identifier assigned by the Vendor
First Name or First Name + Last Name	Alpha	Yes	Large, bold font
Working Title	Alpha	No	
Company	Alpha numeric	Yes	
City	Alpha	Yes	Optional
State	Alpha	Yes	Optional
Badge type	Multiple choice, all that apply	Yes	Attendee, committee member, speaker, press, VIP, BWC employee
Session selections (1)	Alpha numeric		Date, start time, session name, room number
Bar code			

- (1) Session Selections may appear on a separate badge, badge stub, document or other.

ANTICIPATED ATTENDANCE VERIFICATION/CEU ACTIVITY

Session tracking/CEU activity	Quantity
Sessions offering CEUs:	170-175
Number of concurrent sessions	Up to 22
Most CEU requests at a session:	400
Fewest CEU requests at a session:	5
Average CEU requests per session:	45
Total CEU occurrences for event:	17,000
Maximum time between sessions:	15 minutes

APPENDIX V – EVENT DATA COMPONENT REQUIREMENTS (CONTINUED)**ANTICIPATED CEU TYPES**

CEU type	Value	Applicable sessions (estimated)
IACET	0.1 credit per hour	All
Case manager (CCM)	1 credit per hour	25
Human resource (HR)	1 credit per hour	115
Registered nurse (RN)	1 credit per hour	20
Attorney (CLE)	1 credit per hour	15
Sanitarian (SAN)	1 credit per hour	90
EMS	1 credit per hour	15
Wastewater/Drinking Water (EPA)	1 credit per hour	60
Rehab Counselor (CRC)	1 credit per hour	20
Safety council	1 credit per hour	All
Disability Management Specialist (CDMS)	1 credit per hour	20
Drug-free safety	1 credit per hour	All
Nursing home administrators	1 credit per hour	45
Chemical dependency	1 credit per hour	20
Physicians and clinicians (CME)	1 credit per hour	12