

Question	Answer
Which sections apply to the Conference Manager and which sections apply to the PCO?	Section 1.1 applies to the conference manager. Sections 1.2-1.9, 3.0.4.0 applies to the PCO.
The objective for the RFP is a 5-year proposal with two options for a Conference Manager and a separate team to provide Conference support to include Communications and Marketing Sales, Event Management and Logistics. Can you explain what the (2) options would be?	The options would be to extend the conference manager and the separate team in two, three-year increments to cover additional OCEANS Conference and Exposition. A decision will be made at the end of the base period whether to exercise option 1 and at the end of the option 1 to exercise option 2.
Page ii- can you explain the difference between the ECOP & YP attendee category? And how many of each typically attend each conference?	ECOP is the Program within MTS and YP is the program within OES. The definition for ECOP is an individual within the 10 years of their last degree, https://www.mtsociety.org/ecops . The definition of YP is an IEEE/OES member who graduated with their first professional degree within the last 15 years. In addition, current IEEE/OES student members who completed their first professional degree more than 15 years ago are eligible to apply. https://ieeeyes.org/young-professionals/ . Between 20-50 (total) ECOP and YP attend each conference.
Page 1- can you tell me when the next open meeting year for hotel sourcing is for OCEANS North America? Which year is this? 2025? 2026? The RFP states the Societies are considering naming a rotation of 4 standard locations with an optional 5th location identified at least 2 years prior. How far out does the Society want to book the cities/hotels for OCEANS North America?	OCEANS North America is the first conference the new PCO will support. While the LOC has begun planning specific hotel sourcing has not begun. It is anticipated this will begin as soon as the PCO is on board. 2026. Ideally the Societies would like to book cities/hotels 3 years in advance of the conference.
Page 2- can you tell me when the next open meeting year for hotel sourcing is for OCEANS ROW? Both Asia and Europe? The RFP states the Societies are considering naming a rotation schedule for locations as well. How far out does the Society want to book the cities/hotels for OCEANS ROW?	The Societies would like the new PCO to begin with OCEANS ROW 2026, however depending on timing of the award of the contract this may be too late and a local PCO might have to be used. The next OCEANS ROW would be in Europe in June 2027. That location has not been identified. Ideally the Societies would like to book cities/hotels 3 years in advance of the conference.
Can you tell me the final guestroom/block pickup numbers per night/or cumulative for the following : OCEANS North America- Biloxi MS OCEANS North America- Hampton Roads, VA OCEANS ROW- Limerick, Ireland OCEANS ROW- Chennai, India	OCEANS North America- Biloxi MS - unknown but researching. Will update when the figure is know. OCEANS North America- Hampton Roads, VA - 1343 Room Nights (Total pickup. This conference was offered as hybrid, so not everyone was in person.) OCEANS ROW- Limerick, Ireland - unknown, housing was provided on campus OCEANS ROW- Chennai, India - unknown
Is it mandatory for your exhibitors to book a guestroom within your room block for all (3) conferences?	Currently it is not mandated for the exhibitors to book a guestroom within the room block. They are encouraged. The Societies requests the PCO provide their recommendations on how this should be handled within their response.
Do Exhibitor Rules change year to year?	No.
Page 3- the RFP states it's the Societies endeavor to increase conference attendance each year. Do you have a % or attendance number in mind?	Yes see "Growth Expectations" on page 3.

How many members do you have vs how many people attend the conferences?	Members attendance is between 10-20%.
Would you consider switching dates if better attendance was possible?	Yes.
Page 5- For the selected Conference Manager, which conference would he/she begin with? Sept 2024 with OCEANS North America?	The Societies desire that the Conference Manager begin as soon as the contract is awarded.
Would the Conference Manager be expected to attend all the site visits for the future cities/hotels being sourced?	No.
Page 6- Financial Management- it states the Conference Manager would be responsible for managing a bank account, tax management and cash-flow control. Can you please expand upon those responsibilities?	The PCO will be responsible for managing a bank account, tax management and cash-flow, not the conference manager. Only section 1.1 applies to the conference manager. Sections 1.2-1.9, 3.0, 4.0 applies to the PCO. This will be done in conjunction with IEEE, MTS, and the LOC. For NA conferences, MTS uses Wells Fargo. For ROW, unless local laws dictate differently, IEEE requires that someone from IEEE finance must be a signatory on ROW bank accounts. For NA conferences, the IEEE signatory is not needed if the account is owned by MTS.
How much of overall budget/hard costs is the Conference Manager responsible for?	None. The Budget for each conference is managed by the LOC and the PCO
Can you help us better understand the Conference Manager role? Would you be open to leads supporting the Conference Manager for event components like Communications/Marketing, Sales, Event management and Logistics?	The Societies prefer a single individual to support the requirements listed in Section 1.1 and a separate team to provide support to Sections 1.2-1.9, 3.0, 4.0
Page 7- Conference Technology- it states implementation of AV (I'm assuming this would be to source/manage the selected AV company per meeting.) Right?	Correct.
Page 7- Conference Technology- it states involvement with conference app- do you go out to bid each year/each meeting? OR do you have a multi-year agreement with a conference app?	The Societies would like the PCO to provide or outsource the conference app. The Societies do not have a contract in place for the conference app.
Do you have a conference app already in use, or would we source and support a new app?	The Societies would like the PCO to provide or outsource the conference app. The Societies do not have a contract in place for the conference app.
Page 7- Conference Technology- what are the expectations for the Conference Manager around using/management of social media?	Management of social media for the OCEANS Conference and Expo will be with the PCO to provide and implement the marketing plan across all OCEANS. This includes specific conference information e.g. abstract requests, registration as well as marketing for individual sessions at an OCEANS to attract attendance. The LOC will be responsible for the technical content, the PCO for format, layout and publishing of the material.
What social media platforms are you currently on?	LinkedIn, Twitter, Facebook
What level of support are you seeking, from complete content and posting management to designing assets? Or do you have internal staff to manage, and we will create a calendar and post templates?	Management of social media for the OCEANS Conference and Expo will be with the PCO to provide and implement the marketing plan across all OCEANS. This includes specific conference information e.g. abstract requests, registration as well as marketing for individual sessions at an OCEANS to attract attendance. The LOC will be responsible for the technical content, the PCO for format, layout, and publishing of the material.

Page 8- Period of Performance- the RFP states the contract shall begin on July 1, 2024. Does the Society expect the Conference Manager to perform any travel in 2024? Either pre-planning meetings or site visits?	If the award is made prior to September 2024, the Conference Manager would travel to OCEANS Halifax. The Conference Manager will be expected to attend OCEANS 2025 in Brest, France, and OCEANS 2025 Great Lakes.
Would the selected PCO/Conference Manager begin working with OCEANS starting with the September 2024 conference or the June 2025?	If the award is made prior to September 2024, the Conference Manager would travel to OCEANS Halifax. The Conference Manager will be expected to attend OCEANS 2025 in Brest, France, and OCEANS 2025 Great Lakes. The first full conference that the PCO would manage is OCEANS 2026 Washington DC.
Does the July 1, 2024 start date include supporting the September 2024 event in Canada? What's the first conference you envision this RFP thoroughly planning?	If the award is made prior to September 2024, the Conference Manager would travel to OCEANS Halifax. The Conference Manager will be expected to attend OCEANS 2025 in Brest, France, and OCEANS 2025 Great Lakes. The first full conference that the PCO would manage is OCEANS 2026 Washington DC.
On page 10 of the RFP, MTS/IEEE refers to "each volume" of our response. Our standard practice is to send one document, which does not typically exceed the 22MB limit. Does "volume" refer to responses that require multiple emails? If not, could MTS/IEEE provide clarification as to how they would like our response separated into volumes?	The word volume is not correct, it should have been replaced by the word proposal. We expect that the response will be a single document. The Societies are asking that the response not exceed 22 MB.
What is the MTS/IEEE's catalyst for RFP? Does the OCEANS conference have requirements that are not adequately addressed by your current service provider? If so, please describe the areas where MTS/IEEE seeks to improve the providers' service delivery. Current	Current PCO contract is expiring.
May we have a copy of the MTS travel policies?	MTS will provide a copy of our financial policy which includes our travel policies.
Can you provide a copy of the MTS travel policies?	MTS will provide a copy of our financial policy which includes our travel policies.
Is your expectation that the PCO and Conference Manager are both employed by the offeror? And, will the role of the PCO be strictly to work as a liaison between the Conference Manager and the Societies' committees? When the RFP references the "Conference Manager and a separate team" is this meant to be inclusive of the PCO?	Yes if possible. The role of the PCO is described in Section 1.1. The role of the PCO is described in Section Sections 1.2-1.9, 3.0, 4.0
As the Conference Manager is independent, would they be a full-time staff member of MTS/OES?	This could be either. It is up to the offeror to provide their recommendation.
How many hours would you expect of this person's average/week?	This is a full-time position.
For the input on naming the location rotation, would you like the offeror to respond to the two options outlined - keep current rotation or select standard rotations based on objectives - or is the preference for a completely new rotation option(s)?	The Societies are open to ideas from the offerors.
Are venue contracts already secured for 2025 and 2026? Should the venue only be contracted for the term of this contract (through 2029)? Or, based on the projected growth is there a preference for the numbers of years out the venues are contracted?	Venues are not contracted for either 2025 or 2026, but are in early stages of securing the space and date.

Do you have established relationships with general services contractors, customs brokers, language interpretation, and merchandise? If so, is there a cycle with these vendors and do they already have multi-year contracts in place?	No. The vendors have been local to the conference.
Are there any continuing education requirements for attendees? If so, will the offeror be expected to manage CE requirements and submission to governing bodies?	There are some conferences that offer minimal amounts of tutorials. CE requirements and submissions are managed by the attendee, not the conference.
What are the membership numbers for MTS and IEEE at this time? Are there projections for membership growth?	MTS membership is currently ~1900 with expectations of growth. There are ~1600 IEEE OES members.
In your marketing of your conferences, do you publicly publish the programming to entice attendees and sponsors?	The program and schedule are published to the website as soon as is reasonable and filled in as session details are secured.
Will we be handling and managing the buying of all media purchases, including digital, print, mailing, social media, etc	Yes.
Is there a sample conference budget inclusive of marketing spend that you could provide?	No. The Societies desire that all conferences have a minimum of 20% net, with growth expectations as outlined in the RFP.
The description of the marketing implies mostly owned and earned media channels. Is there any desire or budget towards paid advertising for growing the event attendance?	The Societies are open to innovation in this area.
Does your event budget scale to adapt to local currencies and costs? We know costs can vary significantly when comparing Biloxi, MS, to Chicago, IL.	Yes.
Do you plan to grow the operating or marketing budget of the conference to support the desired growth of the conference?	The Societies are looking to increase the overall revenue from the conference and are open to ideas on innovative marketing strategies.
Do you have a not-to-exceed budget in mind?	No, however the Societies desire that all conferences have a minimum of 20% net, with growth expectations as outlined in the RFP.
Is there a set budget for the contract?	No, however the Societies desire that all conferences have a minimum of 20% net, with growth expectations as outlined in the RFP.
What is the total budget, including hard costs + Conference Manager fees? If unknown, can you please share previous budget, including hard costs + Conference Manager fees?	Historical financials provided. The Conference Manager will be paid for by shared cost by MTS and OES.
What have you paid in the past for the services of a Conference Manager and Professional Conference Organizer?	This information cannot be provided.
Some costs will be defrayed through registration, receptions, meals. What other hard costs are covered- Production? Tours?	Costs are defrayed by registrations, sponsorships, exhibit sales.
How much on average does IEEE OES/ MTS spend on US conferences? An international conference will have more varied costs. The	The last two NA conference spent ~\$800,000.
Registration-wise, re developing fees "in coordination" with Societies-how much do they change or increase every year to cover more costs?	Registration fees generally increase at a minimal percentage to cover growing costs and inflation.
Do the fees for Conference Manager come from sponsorship effort?	No. The Conference Manager will be paid for by shared cost by MTS and OES.
Is there a rubric for scoring responses	No.
When will a decision be made about moving forward with a presentation to the joint committee?	We anticipate this to be within 3 weeks after the proposals are received.

Under 1.1 under Section B - can you elaborate on the 4th bullet point? We're unsure what is meant by "Statement of Work for approved by IEEE CEE and the MTS President no later than 18 months ahead of the conference"?	The current arrangement with the PCO is a master management agreement and each conference has its own statement of work that has to be approved by MTS and IEEE CEE. If that type of contracting arrangement is made with this PCO this is the timeline needed for approval.
Does your internal team handle speaker communications and programming? Do they also schedule sessions in provided spaces?	Speaker communications are handled through the abstract management system. Programming for the abstract submitters is done by the LOC. Spaces and overall schedule are managed by the PCO in conjunction with the program the LOC is creating.
The scientific program is managed in-house, but does this include keynotes?	Keynote speakers are chosen by the LOC. The PCO is involved with the overall scheduling.
Who generates the Invite List for participants/speakers/trainers in the past?	This list is generally curated by the LOC.
Who curates the programming? Have they ever been paid for by partners? If not, are you open to that model?	Programming for the abstract submissions is done by the LOC.
Do you accommodate multiple languages for the conference, particularly the ROW host country's language(s)?	All conferences are held in English.
Oceans North America: Have the 4 rotating cities been selected? If so, which ones? If not, would the RFP process need to be part of this contract?	The cities have not been selected and will likely be selected by the Societies OCEANS oversight committee and would welcome suggestions from the PCO.
ROW: Have the rotating cities been selected? If so, which ones? If not, would the RFP process need to be part of this contract?	The cities have not been selected and will likely be selected by the Societies OCEANS oversight committee and would welcome suggestions from the PCO.
Do you plan to continue using your existing registration platform?	The platform is sourced by the current PCO. The Societies are open to using a different platform.
How frequent are the LOC calls? Can you share the MTS travel policies?	LOC calls are generally monthly for each conference in planning that are two years out. MTS will provide a copy of our financial policy which includes our travel policies.
Would you be willing to contract the Conference Manager separately from the Professional Conference Organizer and Exposition team?	Yes.
Could the Conference Manager be a full-time member of our Conference Team (if they are available for and capable of all required meetings and tasks)?	Yes.
Is conference format based on the current attendance numbers, or does it have some capacity to change based on the growth expectations?	The format of the conference is based on history. The conference has its root in the published papers, but has begun evolving over the last five years to offer content such as panels, townhalls, ECOP/YP programming etc. The Societies are interested in innovating the conference and look forward to hear from potential PCOs on how this can be accomplished.
What has MTS/IEEE done to date to grow audiences? Which constituencies have you prioritized in years past? Where do you see growth coming from?	We have expanded programming to include more townhalls and workshops, training sessions, job fair, and programming for early career and young professionals.
What is the size of your mailing list?	Between 5-10K. While the list is maintained by the current PCO the societies own the list.
What prospects are you targeting for new exhibitors? Will you be able to share lists from past conferences?	Yes the Societies own the lists and we will share with the new PCO. The Ocean Enterprise is growing and we are targeting all companies within the Ocean Enterprise.

Does the conference have a unique brand/logo each year based on the location of the conference? Or do you desire a singular brand that can be updated year over year to stay consistent?	The logo has been branded across all conferences for consistency and brand recognition.
Where is the current website hosted?	Google Cloud
What platform is it built on?	Wordpress
What website service is the current host for the https://oceansconference.org/ website?	Google Cloud
What is the current Mailing List service?	Handled by current PCO, provider unknown at this time, but will try to provide an answer.
Are there any other existing marketing platforms/tools in use? If so, which ones are they?	Handled by current PCO, provider unknown at this time, but will try to provide an answer.
Staffing: Is there an expectation of a letter of commitment from one staff member to be the lead for all 5 years? Must all staff remain the same?	The Societies understand that a five-year guarantee is not possible. The Societies would like the turnover to be low but understand staff turnover. For the key individual, the Societies expect the contractor inform and work with the Societies if a change is made.
Financial Viability: What documentation is required for proof of financial viability?	Audited financial statements.
Who chooses trainings/workshops topics every year- Trainers or Attendees, or someone else?	Training topics are curated by the LOC, usually in response to polling potential attendees as to what they would like to see. Workshop and town hall topics are often suggested by the Societies and/or the LOC. Any attendee can put in an abstract to hold a workshop or town hall. The LOC makes the final decision on acceptance.
If you've analyzed attendees, what insight can you share about repeat attendees vs. new attendees?	We have not done this analysis.
How many VIPs or rock stars do you have to take care of every year, both with invites and speaking roles? Who are they- leadership, speakers, participant?	The society presidents are considered VIPs as well as some high-level speakers (1-2 per conference).
Sponsorship-wise, has the Oceans Conference always been managed by outside Conference Manager?	OCEANS has always been managed by an outside PCO.
Are there institutional partners or teams within IEEE OES/ MTS that raise funds to support this event every year?	No.
What best practices and examples of successful relationships with past partners can you share?	Communication is key with partners. The societies have engaged other societies to be co-sponsoring societies offering their members the special membership rates, marketing each other's events, and visibility on the websites.
What % of past sponsors participate year after year?	~20%, often dependent on location. Some sponsors are more likely to sponsor in areas they have a presence.
Can you tell me which conferences hotels have been booked/secured to date? <ul style="list-style-type: none"> •2025- ROW- •2025- North America- •2026- ROW- •2026- North America- •2027- I'm assuming destinations have not been confirmed, right? 	<ul style="list-style-type: none"> •2025- ROW- unknown, in progress by current PCO •2025- North America- unknown, in progress by current PCO •2026- ROW- Unknown, not secured •2026- North America- not started •2027- No conference locations have been selected yet