

*experient*<sup>™</sup>  
**Book of Lists**  
**Supplier RFP Checklist**



# The Experient **Book of Lists**



## Supplier RFP Checklist

**The most important item in any checklist is the one you forget!**

**The Supplier RFP Checklist is a living document. Meeting professionals are encouraged to forward their own checklist items to: [meetingmentor@experient-inc.com](mailto:meetingmentor@experient-inc.com). Updates will be posted regularly at [experient-inc.com](http://experient-inc.com).**

**Have you ever had trouble preparing a Request for Proposal (RFP)? There are so many details and items to remember that the process can be overwhelming... but it doesn't have to be. The following checklist will help you determine those items to include in *all* supplier RFPs as well as those items that are specific to a supplier type.**

### COMMON DETAILS IN RFPs

#### BASIC INFORMATION ABOUT YOUR GROUP

- Organization name.
- Name of meeting.
- Dates of meeting. Be sure to point out if any of the dates are a holiday.
- Name, address, telephone and fax numbers, e-mail address of any third-party contacts as well as client information for contract purposes only.
- Location of meeting – city and facility or facilities.
- Headquarters hotel and/or room block by hotel, if applicable.
- Number of attendees.
- Attendee profile.
- Previous meeting locations.
- Deadline for proposal submissions.
- Budget or budget range.
- Date decision will be made.
- Future location – if requesting a multi-year proposal.

#### LIST OF ITEMS REQUIRING PRICING

- Provide as many details as possible regarding the services required.
- Clearly state how you require the information to be presented.
- Provide a template for the suppliers to make their job, and yours, easier.

#### REQUIRE THE FOLLOWING VENDOR INFORMATION

- A list of at least three references.
- A copy of the company's insurance policy.
- The age and history of the company.

- Payment/deposit and cancellation structure. Note client payment terms, if applicable.
- Discounts and complimentary items provided by vendor.
- Itemized list of labor costs associated with all facets of the program.
- Labor qualifications, technical training.
- Does the company own its own equipment (if applicable) or will it be rented?

### DETAILS BY SUPPLIER

#### AUDIO VISUAL

- Provide outline of conference program (include agenda-at-a-glance if available) including session quantities, room locations and audience size.
- Indicate meeting space specifications including move-in/out times, 24-hour holds, etc.
- Include general session information including move-in/out times, session times and dimensions of the room. Note whether the session will be audio or videotaped.
- Specify equipment needs per room. If you do not have the actual requirements, use last year's requirements.
- Note that backup equipment will be available at no additional cost.
- Provide details on exhibitor rentals from last year's event. Indicate if the group expects a credit/rebate based on a percentage of exhibitor revenue.
- Obtain standard printed price sheets and explanation of discounts being offered.
- Confirm number of days being charged rental fees. Are move-in/testing days included in the fee?
- Is the technician's per diem for meals included in the quoted price?
- What is the process of communication while on site – radios, pagers, cell phones?
- What is the ratio of technicians to session rooms during conference hours?
- Is the equipment owned or leased from another source?

#### AIRPORT TRANSPORTATION

- Major arrival and departure dates.
- Estimated number of attendees.
- Manifest requirements and due date.
- Pickup requirements – individual pickups or group pickups.

- Meet and greet staff required in baggage claim with client name on sign.
- Size and type of vehicles requested.
- Age and capacity of vehicles.
- Does the vendor own or lease the vehicles?
- Do the vehicles meet ADA standards?
- What is the maximum "wait time" per individual?
- Details on dispatch services, hours, etc.
- Where will the vehicles be staged?
- Proof of insurance coverage.
- What is the minimum hourly usage charge? When do overtime charges apply?
- Does the quoted price include gratuity, tolls and fuel surcharges?
- Does the company have local permits to work in areas such as airports?

## TOURS

- Dates and time frames for tours.
- Specific ideas or preferences on tour options.
- Include past tour options and the results – favorable or unfavorable.
- Provide final attendance figures from previous tours.
- Minimum number of attendees required to conduct tour.
- Maximum number of attendees allowed on tour.
- Are any meals, beverages or snacks included in tours or on transportation?
- Type of transportation (full-size coach, mini bus, school bus, etc.).
- Are taxes and gratuities included?
- Client liability if tours do not fill up?
- Will event guides be required on tour? If so, include rates.

## FLORAL

- Communicate clearly the purpose of the event (dinner, meeting, VIP function).
- Estimated number of attendees.
- Date of function(s).
- Room set (number of tables, rounds of 10, etc.).
- Floral requirements – centerpieces, stage, head table, etc.
- Themes – past themes used and preferences for this event (colors, logos, etc.).
- Provide list of preferred (and not preferred) plants or flowers.
- Provide floral locations with floor plans, staging and/or room dimensions to assist.
- Provide contact information if florist needs to review the space for proposal.
- Ask to see a prototype either by photo or in person.
- Do they offer linens or other services?
- Are florals/plants owned or rented?
- Setup and removal times.

## CHILD CARE PROVIDER

- What is the company's definition of discipline?
- How are employees selected? Are criminal and reference checks conducted?
- What is the company's insurance policy?

- How are medical emergencies handled? Are employees trained in general first aid and CPR?
- What security measures does the company follow?
- Ratio of staff to child?
- Ratio of space to child?
- What types of activities will be provided?
- Are children's meals provided? If so, for what ages? What ages require food from the parent?

## GENERAL SERVICE CONTRACTOR

- Number and size of booths.
- Number of entrance units.
- Additional information about the show including size of aisles, number and location of lounge areas, etc.
- Copy of last year's floor plan.
- Number of registration counters and furniture.
- Signage needs including aisle signs.
- Drayage requirements.
- Labor requirements.
- Exhibitor revenue from last year.
- On-site services provided, i.e. service desk hours.
- What is included in the exhibitor package?
- Include color preferences for drape and carpet (if available).

## DESTINATION MANAGEMENT COMPANY\*

- Determine what DMC services will be needed, including site selection, airport transportation, special events, team building, themes, entertainment and/or tours.
- Include information about program history, venues utilized for past programs, previous attendance numbers and attendee demographics.
- Determine the timing and duration of activities and services.

\* Details will be determined by actual services required.

## SELECTING SUPPLIERS

- Identify and pre-qualify potential vendors.
  - a. Obtain recommendations from the convention and visitors bureau, convention services or sales managers, your peers or through professional associations.
  - b. Include in-house contractors in the bid process.
- Send the RFP by e-mail, fax or mail to potential suppliers. Request an electronic submission from the vendor followed by two copies via mail, which should include photographs and other pertinent backup information that is not able to be distributed electronically.

**The Experient Book of Lists**  
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and Tourism Bureau

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