



# NBAA

## 2024-2026 Request for Proposals

Registration  
Lead Retrieval  
Attendee/Session Tracking

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# Table of Contents

<b>1. Summary and Background</b>	<b>2</b>
<b>2. Proposal Guidelines</b>	<b>3</b>
<b>3. About the NBAA and General Project Background</b>	<b>5</b>
Registration Overview	5
Lead Retrieval Overview	6
Attendee/Session Tracking Overview	6
<b>4. Project Purpose</b>	<b>7</b>
<b>5. NBAA Current Event Portfolio</b>	<b>8</b>
Miami-Opa locka Regional Forum (2024 - 2026)	8
Schedulers and Dispatchers Conference (2024 - 2026)	9
Leadership Conference (2024 - 2026)	10
International Operators Conference (2024 - 2026)	10
Maintenance Conference (2024 - 2026)	11
White Plains Regional Forum (2024 - 2026)	11
NBAA-BACE (2024 - 2026)	12
EBACE (To be contracted/priced separately) (2024 - 2026)	13
<b>6. Request for Proposal and Project Timeline</b>	<b>14</b>
<b>7. Project Scope</b>	<b>15</b>
<b>8. Budget</b>	<b>16</b>
<b>9. Additional questions</b>	<b>17</b>
General Questions:	17
Account Management:	17
Technology:	17
<b>APPENDIX A: Vendor Information</b>	<b>18</b>
Additional Partner Information (If Included):	18
<b>APPENDIX B: Project Scope</b>	<b>19</b>
<b>APPENDIX C: Gap Analysis</b>	<b>20</b>
<b>APPENDIX D: Vendor Timeline and Key Milestones</b>	<b>21</b>
<b>APPENDIX E: REFERENCES</b>	<b>22</b>

# 1. Summary and Background

The National Business Aviation Association (NBAA) is currently accepting proposals for an Events Registration (Online and Onsite), Lead Retrieval, and Attendee/Session Tracking vendor and system to improve both the internal staff, and external customer, user experiences. The overall vision is to fix current issues, and to simplify, enhance and modernize the attendee experience. Since the NBAA possesses an experienced and technical registration staff, the ideal platforms will be those that have the ability to allow staff to be fully hands-on and self-sufficient without vendor involvement.

The purpose of this Request for Proposal (RFP) is to solicit proposals from various vendors and conduct an extensive and fair evaluation based on the requirements listed below.

## 2. Proposal Guidelines

The issue date of this Request for Proposal is January 18, 2023. If you would like to join in the RFP process, please send an email confirming your intent to respond to [registration\\_rfp@nbaa.org](mailto:registration_rfp@nbaa.org) by January 25, 2023.

If you have any questions, they may be submitted to Vishal Patel, Sr. Manager of Registration, until 5pm CT on Monday, January 30, 2023. All questions will be answered by Monday, February 6, 2023.

This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until 5 PM CT on Friday, February 17, 2023. Any proposals received after this date and time will not be considered. All proposals must be signed and submitted by an official agent or representative of the company submitting the proposal.

Final Systems Deliverables per the Request for Proposal Include:

1. Registration
2. Lead retrieval (submit bid as self or bid with partner)
3. Attendee/Session Tracking (submit bid as self or bid with partner)

While it is our strong preference to find a partner that can offer all of the above services and superior customer support, we recognize that a single vendor may not offer all services in-house, and thus encourage those vendors who focus on registration to include in their proposal any partners with whom they have already worked and whom they strongly recommend for lead retrieval, attendee/session tracking. The pricing and details for each of these supporting products/platforms should be included in the proposal submitted. This means that the total cost submitted should include all partners, not just the registration vendor. It should be clear in the proposal itself, which company will provide each service.

Total cost must be all-inclusive and itemized to include an explanation of all fees and costs. Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions will be subject to review by NBAA and will include scope, budget, schedule, and other necessary items pertaining to the project.

All vendors should provide the following items as part of their proposal for consideration (see below). All sections of this RFP that require a response should be addressed in the order that they are presented. Any incomplete proposal submissions may be ruled invalid.

1. Vendor Information:
  - a. Please include an Executive Summary with an overview of your company and key personnel bios.
  - b. Provide contact information for the representative to be contacted during the proposal process (**Appendix A**)
  - c. Listing of all services and related costs that the company can provide
2. Completed Registration Requirements Sheet (**Appendix B**): Update the addendum Excel spreadsheet columns as outlined in the Scope of Work section.
3. Requirements Gap Analysis (**Appendix C**): Provide a high-level gap analysis of any items you would identify as a “missed” requirement or features/tools not specifically mentioned in the requirement.
4. Third-Party Integrations: Provide a list of applications and other third-party vendors with whom you have built and currently maintain integrations. Also include explanations of any API access that can be used by NBAA or third-party vendors to consume data from the vendor platform.
5. Vendor Timeline & Key Milestones (**Appendix D**): Provide a high-level timeline of your own for standing up this platform, noting key process steps and any due-by dates.
6. Budget/Vendor Cost: All proposals must include all-inclusive and itemized proposed costs per event to complete the tasks described in the project scope.
7. Additional Questions: Please be sure to include answers to the additional questions in dedicated section of the proposal
8. References (**Appendix E**): References should be provided for primary vendor and any supporting partner vendors whose systems, support, and costs may be represented as part of this proposal)
9. Sandbox Environment Access (Optional) - In order to demonstrate the system capabilities and functionality for NBAA staff autonomy, you may provide access to a sandbox environment for NBAA to use during the initial evaluation process

All vendors selected for the second round will be responsible for preparing a registration site mock-up for NBAA-BACE, and prepare a demo based on a demo script that will be sent out after second round vendors are identified. In addition, if not already provided in the first round, access to a sandbox environment will be required for NBAA staff to utilize and evaluate for usability and confirmation of system requirements.

### 3. About the NBAA and General Project Background

Founded in 1947 and based in Washington, DC, the National Business Aviation Association (NBAA) is the leading organization for companies that rely on general aviation aircraft to help make their businesses more efficient, productive and successful. The association represents more than 11,000 companies and professionals, and provides more than 100 products and services to the business aviation community, including the NBAA Business Aviation Convention & Exhibition (NBAA-BACE), the world's largest civil aviation trade show.

#### Registration Overview

Registration for in-person events ranges between conferences that are small in size (100-500 attendees) and fairly simple (2-3 pricing options/tiers, no add-on ticketed items, simple agenda with no sessions) to events that are quite large (15,000+) and fairly complex - (multiple pricing options and pass types, numerous different types of discount/invitation codes, multiple different add-on items, multiple concurrent sessions, exhibitor bulk registrations) is presently handled through an external registration provider.

For the larger in-person meetings, NBAA requires in-person registration support on-site at the meeting venue.

At our largest events (NBAA-BACE & EBACE) we typically have 10-20 full-service registration workstations, with 30-60 express badge pickup counters. On-site events require vendor support at the meeting venue as well as input in training for temp staff, and co-supervision with the Registration Manager on site. For midsize events 1,000-5,000, the registration footprint is naturally smaller and equipment and staffing needs scaled appropriately, but with similar equipment and set up and support expectations. For small events (under 500), NBAA staff usually handles on-site registration/badging/check-in at a single desk using vendor equipment with remote support.

NBAA expects some level of on-site reporting capabilities to provide the latest registration data to leadership at a moment's notice. This would include total number of registrants, a breakdown by badge type (attendee, staff, exhibitors, service providers, etc), and total checked in vs registered. NBAA would also like to report on registrant standard demographics like geographic location and online vs onsite registration, as well as custom demographic/survey questions created for the event.

## Lead Retrieval Overview

Lead retrieval for current in-person events are supported and managed by the current registration vendor. Exhibitors have a link in the exhibitor registration portal through which they may order hand-held lead retrieval tracking equipment or a mobile lead retrieval application. All reporting is accessible to the exhibiting company in real-time throughout the duration of the event and post event for 90 days post-event. Both the physical device and application offers the ability for exhibitors to add custom tags and handwritten notes. The expectation from exhibiting companies is intuitive, user-friendly and accurate lead retrieval equipment, real-time data reporting, and the capability to integrate registration data and attendee demographics (as permitted/defined by NBAA) with lead retrieval data.

## Attendee/Session Tracking Overview

Attendee/Session tracking for current in-person events are supported and managed by the current registration vendor. Equipment options include both hand held and self-serve tabletop devices which can be programmed with a schedule of sessions so that the session being scanned will automatically change. All reporting is accessible real-time throughout the duration of the event, and the data is integrated into the registration/attendee data. Ideally the system would allow for assigning credit hours to each session and devices will be able to update/synchronize with changes that may occur to the sessions (Additions, edits, cancellations, etc).

## 4. Project Purpose

The NBAA's decision to go out for RFP is multi-fold:

The primary goals of improving our registration, lead retrieval, and attendee/session tracking platform include:

1. Putting the attendee experience first with fully modern, innovative, user-friendly, self-service registration and attendee dashboard(s) for ease of initial registration, updates, cancellation, refunds, etc.
2. Improving back-end NBAA staff experience of building, customizing, managing, and reporting on registration
3. Working with a registration partner to simplify and streamline staff processes from planning to implementation of online registration to onsite event management and data collection to post-event reporting through improved technology being used to support NBAA events
4. Robust, real-time, customizable data analytics and reporting for registration and attendee/session tracking
5. Open APIs for integration with Fonteva (Salesforce), PayPal PayFlow Pro, Stripe, OnPeak (Housing), Bear Analytics, Map Your Show, Marketing Cloud, and potentially other platforms within NBAA's extensive tech stack

## 5. NBAA Current Event Portfolio

Proposals will include

### Miami-Opa locka Regional Forum (2024 - 2026)

Date	January
Location	Miami-Opa locka
Attendance	2500+
Advanced Vs Onsite Reg	Primarily in advance but significant onsite registration as well
Exhibits	Yes with 100+ Exhibitors
Lead Retrieval	Yes
Attendee/Session Tracking	No
Onsite Registration	<p>2 Day Event            Day 1 Setup day and exhibitor reg opening by 3pm, Open 1 NBAA Staff operated satellite stations with vendor equipment for session            Day 2 Full day registration and begin teardown at 4pm.</p> <p>1 Registration Location: 4-6 Full Service stations, 6-8 Express Badge Pickup</p>

## Schedulers and Dispatchers Conference (2024 - 2026)

Date	January
Location	Varies (Held within the continental US)
Attendance	2700+
Advanced Vs Onsite Reg	Primarily in advance but significant onsite registration as well
Exhibits	Yes with 400+ Exhibitors
Lead Retrieval	Yes
Attendee/Session Tracking	Possibly
Onsite Registration	<p>4 Day Event</p> <p>Day 1 Setup day for main registration, Open 1 NBAA Staff operated stations with vendor equipment for session</p> <p>Day 2 Full day registration</p> <p>Day 3 Full day registration</p> <p>Day 4 Full day registration and begin teardown at 4pm.</p> <p>1 Registration Location: 4-6 Full Service stations, 6-8 Express Badge Pickup</p>

## Leadership Conference (2024 - 2026)

Date	February
Location	Varies (Held within the continental US)
Attendance	400+
Advanced Vs Onsite Reg	Primarily in advance
Exhibits	No
Lead Retrieval	No
Attendee/Session Tracking	No
Onsite Registration	NBAA Staff operated 1-2 stations vendor equipment with remote support

## International Operators Conference (2024 - 2026)

Date	April
Location	Varies (Held within the continental US)
Attendance	400+
Advanced Vs Onsite Reg	Primarily in advance
Exhibits	No
Lead Retrieval	No
Attendee/Session Tracking	No
Onsite Registration	NBAA Staff operated 1-2 stations vendor equipment with remote support

## Maintenance Conference (2024 - 2026)

Date	May
Location	Varies (Held within the continental US)
Attendance	1200+
Advanced Vs Onsite Reg	Primarily in advance but significant onsite registration as well
Exhibits	Yes with 150+ Exhibitors
Lead Retrieval	Yes
Attendee/Session Tracking	Yes, Session scanning for attendance, tied to Certificates
Onsite Registration	<p>4 Day Event</p> <p>Day 1 Setup day for main registration, Open 1 NBAA Staff operated stations with vendor equipment for session</p> <p>Day 2 Full day registration</p> <p>Day 3 Full day registration</p> <p>Day 4 Full day registration and begin teardown at 4pm.</p> <p>1 Registration Location: 4-6 Full Service stations, 6-8 Express Badge Pickup</p>

## White Plains Regional Forum (2024 - 2026)

Date	June/July
Location	White Plains, NY
Attendance	3000+
Advanced Vs Onsite Reg	Primarily in advance but significant onsite registration as well
Exhibits	Yes with 100+ exhibits
Lead Retrieval	Yes
Attendee/Session Tracking	No
Onsite Registration	<p>2 Day Event</p> <p>Day 1 Setup day and exhibitor reg opening by 3pm, Open 1 NBAA Staff operated satellite stations with vendor equipment for session</p> <p>Day 2 Full day registration and begin teardown at 4pm.</p> <p>1 Registration Location: 6 Full Service stations, 8 Express Badge Pickup</p>

## NBAA-BACE (2024 - 2026)

Date	October
Location	Las Vegas, NV
Attendance	23,000+
Advanced Vs Onsite Reg	Primarily in advance but significant onsite registration as well
Exhibits	Yes with 1000+ Exhibitors
Lead Retrieval	Yes
Attendee/Session Tracking	Yes
Onsite Registration	<p>8 Day Event</p> <p>Day 1 - Setup Day @ Main</p> <p>Day 2 - Setup Day @ Main</p> <p>Day 3 Exh Reg Open @ Main, Full Day, Setup @ Aircraft Display</p> <p>Day 4 Full day Exh Reg</p> <p>Day 5 Full day Exh Reg &amp; Press Reg Open</p> <p>Day 6 Full day All Reg, Att Open</p> <p>Day 7 Full day All Reg</p> <p>Day 8 Full day All Reg, begin teardown at 4pm</p> <p>2 Registration Locations</p> <p>Primary at Convention Center</p> <p>20 Full Service stations</p> <p>48 Express Badge Pickup</p> <p>Secondary at Aircraft Display Airport</p> <p>6 Full Service stations</p> <p>6-8 Express Badge Pickup</p>

## EBACE (To be contracted/priced separately) (2024 - 2026)

Date	May
Location	Geneva, Switzerland
Attendance	10,000+
Advanced Vs Onsite Reg	Primarily in advance but significant onsite registration as well
Exhibit Hall	Yes with 400+ Exhibitors
Lead Retrieval	Yes
Attendee/Session Tracking	No
Onsite Registration	<p>8 Day Event            Day 1 - Setup Day            Day 2 - Setup Day            Day 3 Exh Reg Open            Day 4 Full day Exh Reg            Day 5 Full day Exh Reg &amp; Press Reg Open            Day 6 Full day All Reg, Att Open            Day 7 Full day All Reg            Day 8 Full day All Reg, begin teardown at 4pm</p> <p>1 Registration Location: 20 Full Service stations, 24 Express Badge Pickup</p>

## 6. Request for Proposal and Project Timeline

All responses to this Request for Proposal are due no later than 5:00 PM CT on Monday, February 6, 2023, and should be submitted via Email to the Sr Manager of Registration, Vishal Patel, at [vpatel+regfrp@nbaa.org](mailto:vpatel+regfrp@nbaa.org).

Evaluation of the proposals will be conducted immediately following the submission deadline. Based upon the review of the requirements and vendor rankings, the NBAA will establish a short list of vendors to move forward in the selection process. Vendors moving forward in the process will be invited to interview with a group of core NBAA stakeholders and provide a demonstration of their product(s) and walkthrough of a mocked up registration site and related data/reporting dashboard. The demonstration will be outlined by the NBAA to ensure the most important requirements are demonstrated.

Competitive candidates are those who follow the plan outlined and are able to clearly demonstrate the ability to meet the NBAA's needs most completely using standard, "out-of-the-box" software. NBAA Intends to make a vendor selection decision on or about April 30, 2023. Upon notification, contract negotiation will begin immediately.

### Project Timeline – RFP to Launch of Registration for First Event

- 01/18/23 – RFP issue date
- 01/25/23 – Confirmation of vendor intent to respond due by 5pm CT
- 01/30/23 – Vendor questions due by 5pm CT
- 02/06/23 – Questions answered by NBAA by 5pm CT
- 02/17/23 – Proposals due by 5pm CT
- 02/24/23 – NBAA reviews responses and makes selections for the 2nd round. Demos, Interviews, and Site Mock-ups, demo outline to be provided
- 03/13/23-03/24/23 – Scripted demos and site mock-up walk-throughs from all accepted vendors
- 04/30/23 – NBAA Vendor Selection and Notification
- 05/31/23 – Contract(s) Signed (Negotiations Complete)
- 06/01/23-09/05/23 – Implementation, configuration, and integration work
  - Please flesh out your implementation steps in the Vendor Timeline
  - Please include any onboarding steps and training for the NBAA Team
  - Please include timeline for creating templates, skins, and css
  - 08/05/23 – NBAA Target to start building new pages for first events to be hosted in the new registration site, starting with registration for smaller events that take place in January 2024 (SDC2024 and the 2024 Miami-Opa locka Regional Forum) and our premier event, the 2024 NBAA-BACE, that takes place in October 2024.
- 11/1/2023 - Registration for SDC2024 and the 2024 Miami-Opa locka Regional Forum open

In **Appendix C**, provide a high-level timeline of your own for standing up this platform, noting key process steps and any due-by dates. The end of this timeline should coincide with the end of the NBAA's timeline.

## 7. Project Scope

Please complete the attached System Requirements spreadsheet as outlined in **Appendix B**.

Please ensure that you update the following columns in that spreadsheet:

- Vendor Ranking - Vendor selects appropriate ranking based on understanding of the requirement:
  - 4 - Meets requirement fully out-of-the-box
  - 3 - Meets requirement with configuration
  - 2 - Partially meets requirement
  - 1 - Meets requirement with customization
  - 0 - Does not meet requirement
- Vendor Notes - Competitive candidates will provide a note for each requirement explaining why they selected the ranking indicated. Competitive candidates will also note any areas where they recommend NBAA work with a partner to fulfill the requirement.
- Vendor Assumptions - Vendor describes any assumptions they are making in order to properly rank the item.

Any requirement that is not ranked will receive a 0 as a default score.

In **Appendix C**, provide a high-level gap analysis of any items you would identify as a “missed” requirement or features/tools not specifically mentioned in the requirements which might be useful to accomplish the NBAA’s goal for this platform.

## 8. Budget

All proposals must include all-inclusive and itemized proposed costs per event to complete the tasks described in the project scope.

Please bear in mind that NBAA's preference is to receive proposals and costs for requested systems per event and cross event costs such as integration setup should be in their own grouping.

Our ideal partner will offer all services in house, but we welcome submissions where vendors who focus on registration include in their proposal partners with whom they have already worked and strongly recommend for lead retrieval and attendee/session tracking. The pricing details of each supporting product/platform should be included in the total cost.

Costs should be detailed as much as possible and broken down to identify fixed vs variable costs, as well as actual vs estimated values.

## 9. Additional questions

### General Questions:

1. How long have you been in business?
2. What other shows have you done? Locations? Size and Scope?
3. Please outline your office locations and capabilities to manage registration for shows taking place domestically and internationally.
4. What can you bring to the table that other companies cannot?
5. Describe your company structure.
6. Describe your internal working environment and culture.
7. Describe your ideal environment for working with clients.
8. What level of PCI compliance do you offer?
9. Are you GDPR compliant?

### Account Management:

1. Who will be our main contact(s) with whom to communicate during pre-planning, show site, and final invoicing?
2. Describe how your team would be organized. Please provide name, title, and short bio for each person.
3. How many on-site staff would you need for a show of this size/scope?
4. We prefer to always have the same group of staff working with us, is there a way to ensure our account representatives and onsite technical staff would remain the same?
5. What is the response time for staff requests?

### Technology:

1. How does your company ensure that it stays on the forefront of technology?
2. What are you doing that is new and different than your competitors?
3. Describe any “out of the box” processes or procedures you have tried with other events. Were they successful?
4. Do you have technology to manage badge swapping? Please explain.
5. What type of badge options are available?

## APPENDIX A: Vendor Information

Business Name	
Representative Name	
Contact Number	
Email Address	
Physical Address	

### Additional Partner Information (If Included):

Business Name	
Representative Name	
Contact Number	
Email Address	
Physical Address	

## APPENDIX B: Project Scope

Please note the System Requirements attached as a separate Spreadsheet will serve as the potential project scope.

Please ensure that you update the following columns in that spreadsheet:

- Vendor Ranking - Vendor selects appropriate ranking based on understanding of the requirement:
  - 4 - Meets requirement fully out-of-the-box
  - 3 - Meets requirement with configuration
  - 2 - Partially meets requirement
  - 1 - Meets requirement with customization
  - 0 - Does not meet requirement
  
- Vendor Notes - Competitive candidates will provide a note for each requirement explaining why they selected the ranking indicated. Competitive candidates will also note any areas where they recommend NBAA work with a partner to fulfill the requirement.
- Vendor Assumptions - Vendor describes any assumptions they are making in order to properly rank the item.

Any requirement that is not ranked will receive a 0 as a default score.

Vendors may also choose to respond to questions within the System Requirements in an additional supporting Word document should the response require more space than the System Requirements document allows. Please be clear in identifying the section and specific requirement line item to which you are referring by using the Reference ID in any additional documentation you may decide to submit along with other proposal documents.





# APPENDIX E: REFERENCES

Please provide at least three (3) references for services that are similar to the size and scope of work outlined in this RFP that proposer has provided within the past three (3) years. At minimum, the proposal must include 3 references for registration services.

If the vendor provided lead retrieval, attendee/session tracking services in addition to registration services for same references, outline summary of all services provided.

If a partner vendor provided housing/lead retrieval/attendee tracking services, please provide partner vendor name and relevant references and service details.

Please use the following format in submitting the required references:

Reference 1:	
<b>Name of Company/Association:</b>	
<b>Phone:</b>	
<b>Address:</b>	
<b>Project Manager/Contact:</b>	
<b>Title:</b>	
<b>Phone:</b>	
<b>Email:</b>	
<b>Dates Services Were Provided:</b>	
<b>Summary of Services Provided:</b>	

Reference 2:	
<b>Name of Company/Association:</b>	
<b>Phone:</b>	
<b>Address:</b>	
<b>Project Manager/Contact:</b>	
<b>Title:</b>	
<b>Phone:</b>	
<b>Email:</b>	
<b>Dates Services Were Provided:</b>	
<b>Summary of Services Provided:</b>	

<b>Reference 3:</b>	
<b>Name of Company/Association:</b>	
<b>Phone:</b>	
<b>Address:</b>	
<b>Project Manager/Contact:</b>	
<b>Title:</b>	
<b>Phone:</b>	
<b>Email:</b>	
<b>Dates Services Were Provided:</b>	
<b>Summary of Services Provided:</b>	