



Request for Proposal

For

Conference Planning

RFP Number: 2013-01

Date Issued: March 25, 2013

## **INTRODUCTION**

OASIS (Ontario Agencies Supporting Individuals with Special Needs) is a not-for profit umbrella organization of 165 agencies across Ontario that provide supports and services to individuals with developmental disabilities.

OASIS is seeking competitive proposals for conference planners to oversee the organizing of our annual conferences working with and reporting to host organizing committees. The contract would be for a 3-year term commencing with our 2015 annual conference. Activities will include:

- Participate in conference committee planning meetings
- Venue search
- Registration management
- Program development
- Venue liaison and on-site management of event
- Golf tournament and other recreational activities
- Pre-conference reception planning
- Assistance in identifying keynote speakers, workshop presenters and sponsorships
- Preparation of all conference marketing and advertising materials

## **BACKGROUND**

OASIS was founded in 1996 and the first annual conference was held in 1998. Since then, individual member agencies or groups of member agencies have taken turns hosting the event. A conference planner has been used for the last two conferences. The host / lead agency is identified by the OASIS Board of Directors approximately 2-3 years in advance of the conference to allow sufficient time to book a facility, keynote speakers, etc. The conference must be held during the first or second week of May and runs from Wednesday to Friday. A pre-conference board meeting is held on the Tuesday.

A hospitality reception is held at the conference the year prior to hosting the event to promote the next year's conference. This event is held on the Thursday of the conference prior to the banquet.

When planning the OASIS conference the following guiding principles are to be adhered to:

- Provides information regarding best practices, emerging issues and current trends through research and other activities
- Diversity to expand our knowledge beyond our provincial boundaries or the developmental services sector
- Promotes and develops our working relationship with the Government and Ministry

- Promotes the collective interests of OASIS member agencies by helping to improve and extend responsiveness and cost effectiveness in the developmental services sector
- Primarily focused on education for management and board levels of OASIS member agencies with various streams of interest such as Human Resources, Finance, Governance and Management Skills
- Presentations are information based and not solicitations to purchase a presenter's services.

## **NATURE AND SCOPE OF WORK**

### **1. Venue search**

- Prepare a request for proposal for space for the conference including
  - Venue, dates available, room rate, meeting space, meeting room rental fees, complimentary items such as internet access, rooms, prize for silent auction, etc., proximity to golf courses and other activities
- Determine with the conference committee potential locations that have venues to support the size of conference
- Accessibility of the venue needs to be considered

### **Venue requirements**

#### ***Banquet facilities***

- Seating should accommodate at least 375 to 400 people for keynote speakers and OASIS banquet
- Dining space is required Tuesday evening for the board and conference committee with the capacity of approximately 40 people
- Banquet space is required for Wednesday dinner, Thursday for breakfast, lunch and dinner, and Friday breakfast
- Small meeting and lunch space needed for the Board on Friday at noon

#### ***Meeting Rooms***

- One (1) meeting room for the OASIS Board on Tuesday with the capacity of 30 people
- Four (4) to six (6) rooms with the capacity of 50 to 80 people per sessions are required for Thursday

#### ***Exhibit Hall***

- Space is needed to accommodate 40 tradeshow exhibitors and the silent auction
- Each tradeshow space is 8 x 10 and access available for internet and electricity
- Set up of the tradeshow occurs on Wednesday evening
- Tradeshow runs during the day on Thursday

- Silent Auction is run during the day and closes during the dinner banquet Thursday evening

### ***Accommodations***

- A block of a minimum of 200 rooms needs to be available (Tuesday, Wednesday, and Thursday nights)
- Rooms should be both single and multiple occupancy and at minimum have 2 double beds or 1 queen size bed
- Internet access is required for delegates and may be an additional charge

## **2. Registration Management**

- As previously noted, source/negotiate/contract with on-line registration supplier and manage set-up requirements
- Develop registration process protocol and receive registrations and payment status from designated client authority or on-line registration service (fees for on-line registration paid by the conference committee)
- Prepare reports as required from database or excel spreadsheet provided by committee or on-line registration service
- Develop and send confirmation packages to all registered delegates
- Prepare on-site name badges and custom delegate itinerary indicating workshop selection; provide special diet tickets, etc.
- Act as main contact for event registration and respond to enquiries from phone, fax or email
- Registration Manager on-site for duration of event managing registration – including computer and printer on-site to manage any changes/new delegates, etc.
- Work with designated agency to prepare reports and backup documentation for possible audit
- Test on-line registration from website to ensure effective operation

## **3. Speaker Management**

- Send detailed confirmation letters to speakers outlining their date and time of presentation
- Follow up with presenters regarding their bios and session descriptions for the registration brochure
- Follow up with the presenters regarding their travel, accommodation and audio visual needs
- Follow up with the speakers regarding obtaining their PowerPoint presentations for copying or CD-ROM production and to burn to a master CD for onsite at the event.
- Prepare and send speaker thank you letters after the event

## **4. Marketing Material Preparation**

- Hire graphic artist and printer (within assigned budget) or work with designated client supplier

- Work with graphic artist for teaser flyer, registration brochure and on-site brochure preparation
- Prepare master PowerPoint slides for on-site promoting client, sponsors, etc.
- Preparation of in-house signs and/or ordering of professionally printed signs

#### **5. Venue Liaison and On-Site Management**

- Prepare meeting specifications document outlining room set ups, audio visual requirements, breakout rooms, catering, etc. with venue
- Attend tie-down meeting with hotel to review order
- Review and sign off banquet event orders with venue
- Review the final invoice from venue for sign off before payment by client
- Provide a Senior Meeting Planner on-site for duration of conference to manage the event which includes liaison with banquet captain for catering, checking room set ups, working with A/V provider for equipment testing, organization of presenters, cueing of emcee, signage, etc.
- Assistance with delegates special needs

#### **6. Supplier Management**

- Seek quotes for signs, audio visual equipment, name badges, décor and entertainment, transportation if needed

#### **7. Script**

- Preparation of the on-site event script for emcee to include timing, housekeeping notes, introductions for speakers, recognition of sponsors, etc, technical cues for audio visual technician
- Prepare technical script for A/V supplier

#### **8. Program Development**

- Assist committee in the development of the program to ensure the best possible experience for all participants (i.e. education flow, dedicated exhibit time, etc.)
- Assist committee in the creative development of themes and format of sub-events
- Attend numerous committee meetings as needed to plan details, including face to face meetings possibly supplemented through the use of video conferencing and conference calls
- Assist with agenda preparation and minute taking for committee meetings

#### **9. Critical Path Development**

- develop a critical path which outlines tasks, timelines and responsibilities
- update the critical path on a regular basis
- ensure completion of tasks within timeframes identified

### **10. Sponsorship Program**

- Lead role in soliciting sponsors and exhibitors on committee's behalf
- Develop a sponsorship and tradeshow prospectus for committee to sell
- Manage sold sponsors (send confirmations, collect ads, logos)
- Manage sold exhibitors (send confirmation letters, manage tradeshow set up and tear down)

### **11. Pre-conference Reception Planning**

- Assist committee in planning and executing the Hospitality Reception promotion at the conference the year prior to hosting

### **12. Golf Tournament and Other Activities**

- Source out and book golf venue in close proximity to conference venue including lunch during the tournament
- Tournament is usually 60 to 80 players
- Organize other activities (spa, etc.)
- Work with committee to organize golf foursomes

## **BUDGET**

While OASIS is looking to extend the contract to cover 3 annual conferences, the budget should reflect each conference as a separate event. Every proposal must be accompanied by a detailed budget. The proposed budget should be realistic, based on the costs involved in implementing the project, backed up by appropriate estimated allocations. Terms and timelines for payment will be negotiated in the contract for services, but based on receipt of written invoices from the Conference Planner for services completed.

## **REQUIREMENTS**

Event planner to provide a copy of their own comprehensive liability insurance.

Identify clearly what Event Planner fees will not cover.

## **PROPOSAL RESPONSE GUIDELINES**

To ensure a proposal is considered for evaluation it should include all the information requested and be presented in the order described below:

- A covering letter, dated and signed by a person authorized to negotiate, make commitments, and provide any clarifications with respect to the proposal on

behalf of the bidding Conference Planner or firm. Provide a statement indicating your organization's understanding of the proposed project and the deliverables required. Provide an indication of any proposed deviations or exceptions to the terms and conditions outlined in this RFP document.

- A proposed project plan, with timelines, that indicates the number of meetings, etc. and a proposed work plan and budget.

## **PROJECT RESOURCES**

### Project Team

Identify the lead conference planner and provide a breakdown of qualification for each member of the project team including:

- Name
- Role
- Responsibility
- Location
- Estimated amount of time each resource will be dedicated to the project
- Resume showing education, professional certifications and length and type of experience

Please supply three client references for your organization or lead Conference Planner, including the name and address of the reference and the name, title, and phone number of the contact person. Describe how the services provided to these references are similar to the service proposed in this RFP.

## **SUBMISSION DEADLINES**

Each candidate must submit an original and an electronic version of the proposal in Microsoft Word version no later than 4:00 p.m. on May 6, 2013 indicating the RFP Reference as follows:

Allan Mills, Vice President OASIS  
c/o Christian Horizons  
25 Sportsworld Crossing Road,  
Kitchener, ON N2P 0A5  
RE: RFP OASIS Conference Planning

Email Address: [amills@christian-horizons.org](mailto:amills@christian-horizons.org)

OASIS is not responsible for delays or losses caused by Canada Post or any other carrier or delivery service. OASIS reserves the right to accept proposals after the date specified.

## **REVIEW SCHEDULE**

RFP Release Date: March 26, 2013

Last Day for Written Questions: May 1, 2013

Closing Date: May 6, 2013; 4:00 p.m.

Tentative Review and Selection of Conference Planner: May 10, 2013

## **INQUIRIES**

Inquiries, interpretations, and questions regarding this RFP are to be directed to Allan Mills, in writing, at [amills@christian-horizons.org](mailto:amills@christian-horizons.org). Written e-mail questions may be received up to May 1, 2013.