

Request for Proposal

Conference Planning Services – ERAPPA 2023

Todd K. Miller, CFP, NJAPPA President

This page is left blank

TABLE OF CONTENTS

<u>Section No.</u>	<u>Description</u>
I	Proposal Submittal Form
II	Request for Proposal A. Purpose B. Background C. Resources Available
III	Scope of Services
V	Proposal Requirements
VI	Evaluation and Award of Contracts

I. PROPOSAL SUBMITTAL FORM

Issue Date: January 15, 2020

Title: Conference Planning Services for ERAPPA 2023

To:

Mr. Todd K. Miller, CFP

NJAPPA

New Jersey Institute of Technology (NJIT)

323 Martin Luther King Blvd.

Newark, NJ 07102

The undersigned, having familiarized him/herself with the attached request and scope of work and all addenda, thereto, hereby proposes to furnish all technical expertise, and documentation required by said documents and addenda for Conference Planning Services for ERAPPA 2023 in **a New Jersey location to be determined.**

Acknowledgements:

The undersigned acknowledges that sealed packages containing two (2) copies of bound proposal and (1) electronic copy for furnishing the services described herein will be received at the address above until **2:00 PM local time on February 14, 2020** and that all proposals must reach the above address by the deadline stated in order to be considered. Proposals should also be emailed to **todd.k.miller@njit.edu**.

The undersigned acknowledges the following are attached to and included as part of this proposal:

Addenda:

The undersigned acknowledges receipt of the following Addenda to the Scope of Work:

No Addenda _____

Addenda #1 Dated _____

Addenda #2 Dated _____

Addenda #3 Dated _____



All inquiries for information should be directed, in writing, via e-mail to:

Todd K. Miller, CFP
NJAPPA
New Jersey Institute of Technology
323 Martin Luther King Blvd.
Newark, NJ 07102
Todd.k.miller@njit.edu

The undersigned hereby designates the address given below as the official address to which all future correspondence may be mailed and delivered.

Date: _____

Company Name: _____

Company Address: _____

_____ Zip: _____

Contact Name: _____ (signature in Ink)

Printed/Typed Name: _____

Telephone Number: _____

Facsimile Number: _____

E-mail Address: _____

End of Form

II. NJAPPA: REQUEST FOR PROPOSAL- CONFERENCE PLANNER FOR ERAPPA 2023

a. PURPOSE

NJAPPA (the New Jersey Chapter of APPA) is an organization of Higher Education Facilities Professionals comprised of representatives from Colleges, Universities, and Schools, both public and private in New Jersey. The NJAPPA Chapter is dedicated to promoting common interests in Facilities Management, fostering professional ideas and standards and creating educational opportunities for facilities professionals. We are an independent chapter of the Eastern Regional of APPA (ERAPPA) which serves to our parent organization, APPA.

The purpose of this RFP is to solicit proposals for a conference planning team to assist with the **2023** conference of the Eastern Region organization. This proposal will assist the selection committee in determining a conference planning team with experience in the development, planning, advertising, and executing conferences of similar size and scope.

Once a team is selected, NJAPPA will enter into a contract through competitive negotiations for the professional services of the lead firm.

The Conference Planning team shall provide all professional services necessary for the ERAPPA **2023** conference referenced in this RFP.

b. BACKGROUND

This annual event is typically attended by approximately 500 participants and is the main source of professional development for the regional chapter, a source of interface between the business partners and institutional members and a source of revenue for the local chapter. Through a strictly volunteer host committee's efforts, the conference consists of pre-conference meetings, pre-conference President's reception, a keynote speaker, hall of resources (business partner displays), professional development seminars, a main off-site social event, an on-site awards banquet/event, tours of significance to facility management professionals and an organized outdoor event and a plenary speaker. A mid-year planning meeting is held approximately 6 months prior to the main conference for approximately 50 participants.

c. RESOURCES AVAILABLE

It is expected that all submitting proposals will familiarize themselves with the annual meeting guide available at www.erappa.org. One may also view the website for this year's conference at www.erappa2020.org

III. SCOPE OF SERVICES

i. Site Selection Services:

1. Create a request for proposal and solicit proposals on behalf of NJAPPA from various venues capable of accommodating the conference **within New Jersey**
2. Negotiate block rental rates, guarantee numbers, complimentary rooms, hospitality suite, and mid-year meeting accommodations on behalf of NJAPPA and provide a summary of proposals to the Planning Committee;
3. Provide consulting support as it relates to the selection of the venue utilizing the experience of the planning partner to provide recommendations regarding the best overall value to the organization including the greatest opportunity for conference success;
4. Investigate and solicit possible site specific grant funding opportunities that might be available for consideration and utilization;

ii. Meeting Management Services:

1. Advise Convention co-chairs and Conference Planning Committee on program development and booking speakers, including, but not limited to, keynote and plenary sessions;
2. Meeting Planning
 - a. Provide consulting support as it relates to the program in the areas of menu selections, room layouts, program design, and audio-visual services.
 - b. Create a specification manual detailing assignment of meeting space, food and beverage requirements, room set ups for education sessions, registration services, exhibits;
 - c. Provide guarantees to hotel;
3. On-site Meeting Management
 - a. Oversee all arrangements and monitor the hotel staff and their duties relative to the conference meetings;
 - b. Be available to answer questions, assist with changes or deal with problems which may arise throughout the conference;
4. Schedule Planning
 - a. Assist in the creation of and provide an assessment of the best flow regarding breakouts, general session and food/beverage functions and placement in hotel meeting space;
5. Special Event and Program Planning
 - a. Provide support in obtaining décor, floral arrangements, entertainment, and planning functions for offsite functions;
6. Planning meetings

- a. Attend one kick-off meeting of two hours duration at one of the NJAPPA member school locations shortly after contract award. This meeting could also be conducted via Zoom, Skype, etc;
 - b. Attend up to eight, two-hour planning meetings at one of the NJAPPA member school locations;
 - c. Attend up to four, two-hour planning meetings at the selected **hotel in 2023:**
 - d. Be available for conference call updates with the Conference Co-Chairs on a monthly basis prior to each NJAPPA Board meeting. These meetings are typically scheduled for the second Friday of each month.
 7. Printing and Signage
 - a. Provide support in obtaining services for purposes of printing any and all conference materials and signs.
 8. Billing
 - a. All conference expenses shall be reviewed and evaluated. The invoices will only be handed over for payment after careful review to ensure errors have not been made and they are in accordance with contractual terms and conditions.
- iii. Registration Management Services:
1. Utilizing the APPA registration system, compile an attendees list and confirm data, payments, etc. are complete and provide the list to NJAPPA;
 - a. Time and coordination with APPA for the firm to educate itself with this system shall be included as part of this proposal;
 2. Generate reports reflecting attendance, counts for banquet functions, arrival/departure patterns, and finances; **reports should be in Microsoft Excel format**
 3. Provide support, receive, and assemble conference vendor or business partner giveaways to be distributed at registration;
 4. Pre-assemble registration packets with badge, meal and drink tickets, and appropriate identification ribbons;
 5. Provide on-site registration management, staffed appropriately to handle peak registration periods;
 6. Compile and send confirmation to all pre-registered attendees up to one (1) week prior to conference dates;
 7. Compile and provide list of attendees to all business partners in **Microsoft Excel format**, electronic format with hard copy available on request. Update throughout the conference and provide access to refreshed hard and electronic copies as requested;
 8. Coordinate collection of any unpaid registrations after the conference (the conference planner will only be responsible for three collection attempts and assumes no responsibility for unpaid registrants authorized by the client beyond those three attempts)
- iv. Exhibit Management Services:

1. Compose, design, layout, develop floor plan and coordinate printing and mailing of exhibitor prospectus;
2. Provide telecom support for questions from exhibitors;
3. Execute electronic mail and telemarketing campaign to increase exhibitor participation;
4. Maintain databases for all attendees and business partners
5. Manage and handle processing of applications and booth assignments;
6. Communicate all needs of exhibitors to the hotel and contractor to insure a positive experience and satisfaction;
7. Coordinate any required labor agreements with conference venue staff;
8. Send out confirmation to all exhibitors with details about set-up and breakdown;
9. Provide on-site support for set-up, breakdown, and show hours;
10. Process all fees paid by the exhibitors;

v. Conference Advertising Management:

1. Develop conference advertising program for attendees, sponsors, and vendors and manage fulfillment of all requirements of these services. These shall include, but not be limited to, the following:
 - a. "Save the Date" electronic mailings, generate "Save the Date" post cards / handouts to be distributed at ERAPPA 2021 & ERAPPA 2022;
 - b. Facebook, Twitter, and YouTube presence;
 - c. E-mail information to previous conference attendees, sponsors, and vendors;
2. Handle all calls and correspondence from sponsors/vendors and process applications;

vi. Pre-conference Planning and Observation:

1. Preparation of pre-conference marketing materials for ERAPPA **2021 and 2022:**
2. Assist in the creation of a short video montage describing the host city for the **2023** conference for presentation at the **2021 and 2022** ERAPPA conferences;
3. Assist in procurement of marketing items to promote the **2023** conference for distribution to attendees at the **2021 and 2022** ERAPPA conferences;
 - a. Assist and Observe at **ERAPPA 2022 in Turning Stone Resort Casino in Verona, New York.** It is expected that a conference planning team representative will travel with the Host Committee to the ERAPPA Conference the year before to observe and to assist with promotion and promotional items for ERAPPA **2023**. ERAPPA **2022** will be in **Verona, NY**, where the conference planner, with the assistance of the host committee, will staff a promotional

booth for institutional members and will solicit business partners for ERAPPA **2023**. (please note that ERAPPA **2021** is in **Valley Forge, PA** and though not a requirement may be useful to observe)

vii. General Administration and Post- Conference Services

1. Report to committee on regular basis to provide financial and general updates and seek all approvals as required;
2. Prepare, reconcile, and submit all forms/payment claims, etc. in a timely and professional manner for approval and payment by NJAPPA;
3. Follow up on all conference accounts receivable and accounts payable as required;
4. Complete all conference follow –up where required

IV. PROPOSAL REQUIREMENTS:

- a. Proposals shall include, at a minimum, the following information:
 - i. Organization Profile
 - ii. Examples of previous experience with organized conferences of similar size including references
 - iii. Office Staff, experience and Certification:
 1. Please include key members of the team specifically assigned to ERAPPA **2023**
 2. Include a schedule with percentage of their time dedicated to ERAPPA **2023**
 - iv. Experience with APPA Registration/Communication Systems
 - v. Strategic partnerships and experience in working with venues in the ***New Jersey***
 - vi. Financial Planning and Fiscal Responsibility process for conference of similar size
 - vii. Marketing and Promotion
 - viii. Address each point from Section III. Scope of Services
 - ix. Any additional notes and a brief description of what separates your firm
 - x. Fees
 1. Lump sum fee for base Scope of Services
 2. Hourly rates for approved additional services

V. EVALUATION AND AWARD OF CONTRACTS:

- a. The ERAPPA **2023** NJAPPA Host Committee Co-Chairs with assistance from members of the ERAPPA **2023** NJAPPA committee will evaluate the proposals.
- b. There may be the potential for an interview of the finalists, for which notification will be sent.
- c. NJAPPA anticipates awarding the contract on or about March 1, 2020.