

CMHACY

Annual Conference Planning & Implementation

Request for Proposal

July 15, 2017

OVERVIEW/BACKGROUND

California Mental Health Advocates for Children & Youth (CMHACY) is a not-for-profit advocacy organization, headquartered in Sacramento and run by a volunteer Board of Directors.

The signature activity of CMHACY is the annual conference which has been held at the Asilomar Conference Grounds in Pacific Grove California since 1980. Unique in the country and attended by as many as 600 stakeholders – parents, youth, providers, school representatives, County agency leaders, state department officials, and legislative staff – the conference has provided a forum for policy development, spawned collaboration and partnerships among counties and providers, incubated state-wide parent and youth organizations, hosted nationally recognized speakers, and showcased cutting-edge clinical advances in work with youth and families. It is the “go to” conference in California for all those interested in behavioral health services for children, youth and their families.

Meeting monthly to plan the conference and develop policy and advocacy positions, the Board of Directors of 12 members is reflective of conference attendees who comprise the membership of CMHACY. Since 1994 The Coordinators – Ronald & Sandralee Jones – have handled conference logistics and provided support to the Board for conference planning and execution. The Jones’ are retiring in 2018.

CONFERENCE DESCRIPTION

The annual CMHACY conference takes place in mid-May at the Asilomar Conference Grounds in Pacific Grove, California. It runs from a Wednesday afternoon to Friday at noon and includes several pre-conference tracks which begin on Tuesday. There are typically six plenary sessions and up to 36 workshops – 12 simultaneous in three 90 minute slots on Thursday. (The attached “Conference at a Glance” shows the schedule and complexity of the event.) The Board develops a conference theme in early fall and issues a request for workshop proposals in November/December. Workshops are selected in February and a conference brochure and registration packet is issued in March. We expect between 500 and 600 attendees annually. See our Website for more information: www.cmhacy.org

SCOPE OF WORK

Project Description

CMHACY is seeking a conference event planner / coordinator to “run” our Annual Conference beginning in May 2019. The successful bidder will be required to “shadow” the current conference coordinators during the 2018 conference cycle beginning in October of 2017. Shadowing activities are negotiable depending on the experience of the successful bidder, though attendance at the 2018 conference is required.

Scope of Consulting/Contracted Services

The intended role of contracted services will include but are not limited to:

- on-line and print marketing materials and event day program
- creative marketing strategies
- registration services – on-line and on-site
- working with Asilomar Conference Grounds for scheduling workshop rooms , lodging and meals
- arranging lodging for guest speakers when necessary
- providing on-site technical and logistical support during the conference
- concluding work with all vendors
- preparing a post-conference report for the Board.

RFP Timeline

ACTIVITY	DATE
RFP Issued	7/15/17
Questions accepted (submit to selson@casapacifica.org)	7/25/17
Answers posted on www.cmhacy.org	7/26/2017
Deadline for Submission of Proposals	8/18/17
Proposals Reviewed/Scored	8/31/17
References Contacted	9/8/17
Contract Awarded	9/18/17
Work Commences, PHASE 1: Shadow current conference coordinators	10/5/17
2018 Conference	May, 2018
PHASE 2: Independent coordination of 2019 conference	Fall, 2018
2019 Conference	May, 2019
Contract Concludes	6/30/2019

TASKS

General Duties and Administration

1. Create and oversee the Event planning timeline
2. Develop and manage the Event budget
3. Attend in Sacramento at least four monthly planning meetings (Board retreat mandatory – October 5 & 6, 2017), prepare meeting notes that include assigned tasks to Board members
4. Follow-up and “bird dog” assigned tasks as necessary
5. Keep Board President and/or assigned Board liaison apprised of all progress/issues and potential problems
6. Collect and review invoices, then forward to Board liaison for payment
7. Assist Board with identifying volunteers to work during the Event
8. Manage sponsors once confirmed by Board members
9. Manage volunteers during event

Preparation for the Call for Papers (Workshop Proposals) (CFP) (October / November)

10. Produce Call for Papers after conference theme and desired topics are established by the Board (October/November) – draft to be reviewed by Board Committee
11. Edit master mailing list – CFP Postal Mailing List
12. Prepare on-line Call for Papers

13. Issue Call for Papers on-line and in print – *functions as a Save-the-Date flyer as well*

Asilomar Contract Review (November / December)

14. Review upcoming conference contract, make adjustments as necessary (lodging rooms, meeting rooms, location and times of catered events, timeline for reductions or increases in lodging reservation, cancellations, etc.)
15. Review the Asilomar contract – two years out – for 2021. Notify designated Board contact of any discrepancies/issues.
16. Attend one pre-event site inspection and coordinate all logistical details
17. Work with Board liaison to select appropriate menus for the event, including dietary restrictions, volunteer and Speaker meals, etc.
18. Work with Board liaison to select and coordinate with translation services, if necessary

The Marketing Packet (MP) (January / February)

19. Organize Call for Papers responses for Board review and workshop selection
20. Collect all conference content – theme, plenary session speakers, workshops, panels, pre-conferences, awardees and schedule – and deliver to graphic designer
21. Notify contact person for all submitted workshops as to the results of the selection process.
22. Provide instructions to selected workshop presenters -- summary for conference program, bios of presenters, AV equipment needed for presentation, etc.
23. Deliver final MP to printer and prepare for electronic distribution
24. Prune master mailing list
25. Issue MP online and in-print (mail)
26. Prepare conference description for CMHACY website (content will be uploaded by our CMHACY webmaster)

Registration (March / May)

27. Obtain from Board or Board liaison pricing and discounts (early bird/ students) and all information about sign-ups, workshop selections, data to be collected from registrants, etc.
 28. Set up Invoicing and collection process for pay-by-check attendees, and files for tracking cancellations and refunds – include information about Continuing Education Units (CEUs)
 29. Open online Registration
 30. Prepare registration content for CMHACY website (content will be uploaded by our CMHACY webmaster)
 31. Oversee and manage entire Registration process (online and mailed) for up to 600 attendees, including:
 - a. Collect necessary information from registrants (workshop selections, dietary restrictions, etc.)
 - b. Manage registration for Sponsors, Speakers, complimentary tickets, etc.
 - c. Respond to phone and email inquiries
 - d. Issue registration refunds and attendee substitutions
- NOTE:** Attendees come to Asilomar in waves – pre-conference beginning Tuesday & Wednesday and conference beginning Wednesday afternoon.
32. Handle all inquiries and special requests from registrants
 33. Create, prepare and organize name badges for event attendees
 34. Procure PowerPoints and / or handouts from plenary session and workshop presenters to be uploaded to CMHACY website

On-Site

35. Produce "Show Flow" to include a minute-by-minute to-do list and specific tasks for all staff and volunteers
36. Setup registration area and all sponsor tables
37. Arrange for onsite registration and payment
38. Staff hospitality / registration counter and manage on-site registrations and Continuing Education Units (CEUs)
39. Assure that all Conference rooms are setup properly
40. Liaison with Asilomar staff
41. Handle all issues / problems during conference

Post-Event

42. Prepare demographic data analysis of attendees from registration materials
43. Prepare and tally Event-day survey of Attendees to assess the event and provide suggestions for next time
44. Prepare post-Event Wrap Report, including documenting suggestions for the next event
45. Plan post-Event thank you and wrap meeting
46. Serve as liaison to venue and vendors to finalize payments
47. Prepare financial report -- final budget to actual revenue and expenses

QUALIFICATIONS

Selected consultant/contractor will possess/demonstrate the following:

- Financial/Contract Management Skills
- Project Management
- Demonstrate excellent communication and customer service skills via email, phone, and in-person.
- Ability to be proactive: seeks out missing information when necessary
- Highly organized and detail oriented
- Ability to create event timelines and meet deadlines
- Prior work for a medium-large nonprofit
- In business for at least 3 years
- Experience in conference planning and implementing
- Prior work with Asilomar Conference Center preferred

BUDGET

CMHACY anticipates a budget of \$40,000 - \$60,000 for the total two-year engagement. All travel expenses and "out of pocket" expenses will be reimbursed, including airfare, hotel and a per-diem for meals. Though important, price is not the primary determining factor for selecting the bidder.

Contract fees will be paid in installments:

- 10% - September 20, 2017 (upon contract signing)
- 10% - June 1, 2018 (upon conclusion of 2018 Conference)
- 20% - October 1, 2018 (commencement of 2019 conference planning)
- 25% - January 1, 2019
- 25% - March 1, 2019
- 10% - June 1, 2019 (upon delivery of the 2019 conference summary to the Board)

The proposal should include proposed potential vendors for graphic design, printing, and mailing of all printed material. Vendor pricing must be submitted to the Board liaison for approval and fees will be paid by CMHACY as pre-approved invoices are submitted to the Board liaison.

PROPOSALS

Those wishing to submit proposals for this Consultant/Contract should carefully review and submit the following information:

General Information

- Name of Individual/Organization
- Contact Person & Title
- Mailing Address
- Telephone Number
- E-mail
- Website

Organizational Overview

- Describe your organization, history and scope of practice
- Provide brief biographies of proposed team (w/ resumes attached)
- Briefly explain why you/your firm is a good fit with our organization and this project
- More specifically, describe how you/your firm meet the required qualifications outlined above

Proposed Work Plan & Timeline

- Description of proposed process to be used to fulfill the Scope of Work/Project Deliverables noted above
- Outline of key steps, persons responsible and proposed timelines to complete each item

Client Management Services & Fees

- Process for managing project, including communications with CMHACY
- Reports to be used to keep project on track and demonstrate fulfillment of expected deliverables
- Proposed project budget aligned with activities in Scope of Work
- Budget narrative, justification and methods of calculation

References

- List of clients (name only) for whom you/your company have provided similar consulting services
- Contact information for three (3) specific professional references

Questions

NOTE: Questions about the RFP are to be submitted to selson@casapacifica.org by July 25, 2017. Answers will be posted July 26 on www.cmhacy.org.

ADDITIONAL TERMS

Applicant Rights

All materials submitted in response to this RFP become the property of CMHACY upon delivery and shall be appended to any formal documentation, which would further define or expand the contractual relationship between CMHACY and the Consultant/Contractor. Each applicant, as an express condition for CMHACY's consideration of such proposal, agrees that the contents of every other proposal submitted by other applicants with respect to this RFP are confidential, proprietary and trade secret information in all technical areas and waives any right to access such proposals during the RFP process. No submissions or supporting documentation will be returned to the submitting applicant. Neither party shall be liable for disclosures that are required by law.

Conflict of Interest

Proposing companies/entities are asked to identify any conflicts of interest in serving CMHACY and to clarify, if applicable, how conflicts will be managed/mitigated to ensure the best interests of CMHACY are met.

Reservation of Rights

This RFP does not commit CMHACY to award a contract, to pay any costs incurred in the preparation of the proposal to this request, or to contract for services. CMHACY reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with any qualified persons or organizations, or to cancel in part or in its entirety this RFP if, at the sole discretion of CMHACY, the organization determines that it is in its best interest to do so.

PROPOSAL SUBMISSION

Submit proposals electronically to selson@casapacifica.org. Mail one hard copy to:

Steve Elson, PhD, Treasurer
C/O Casa Pacifica
1722 South Lewis Road
Camarillo, CA 93012