



## Request for Proposals Conference Planning Services RFP #04.2019

Event	Time (Pacific)	Date
RFP Issued		4.4.2019
Questions accepted in writing – email only to <a href="mailto:info@calaba.org">info@calaba.org</a>	4:00 PM	4.19.2019
Proposal Deadline	4:00 PM	4.26.2019

### **Notice of Solicitation**

Notice is hereby given that California Association for Behavior Analysis (CalABA), located at 400 29<sup>th</sup> Street, Suite 518, Oakland, California is seeking RFP's for conference/event planning services.

#### **I. Purpose of this Request for Proposals (RFP)**

California Association for Behavior Analysis (CalABA) is seeking proposals from qualified organizations/individuals to provide Conference Planning Services in support of the associations mission, vision and strategic goals.

#### **BACKGROUND:**

Established in 1998, the California Association for Behavior Analysis was formed when two organizations joined together: The Northern California Association for Behavior Analysis (NCABA) and the Association for Behavior Analysis and Therapy/Southern California (ABAT/SC). The California Association for Behavior Analysis is a 501c (6) non-profit corporation whose membership includes behavior analysts, academics, researchers, students, other interested parties and the populations they serve. The organization's mission is to advance, promote, and protect the science and practice of behavior analysis. CalABA directs its policy efforts to ensure that our membership remain viable providers of quality behavioral health care throughout the state and are participative in state and local community health delivery systems.

#### **GENERAL INFORMATION/OBJECTIVE:**

The CalABA Annual Conference will occur March 5-8, 2020, in Santa Clara, California with additional meetings and sessions planned for March 4, 2020. CalABA's conference has evolved from a smaller

regional conference targeting local behavior analysts into a premier, nationally recognized conference with over 3,000 attendees. CalABA provides high quality educational, training, sponsorship and social opportunities in a tech-savvy, vibrant and engaging atmosphere to encourage networking and professional development.

**CalABA Vision:** CalABA will have an informed and engaged membership, a well-developed organizational infrastructure, and a wide sphere of influence.

**CalABA Mission:** The mission of CalABA is to advance, promote, and protect the science and practice of behavior analysis.

## **PROPOSAL SCOPE**

The conference planner for CalABA shall provide a full range of coordination and planning services that will ensure the successful execution of the Annual CalABA Conference scheduled for March 5 - 8, 2020 in Santa Clara, CA. The potential for a longer term relationship can be discussed.

## **SCOPE OF WORK**

### **HOTEL-SITE WORK:**

- 1) Facility Research for 2021 & 2022 venue.
  - a. Conduct a comprehensive facilities search based on the requirements of the project as specified by CalABA. Upon selection of a facility, negotiate final contract specifications.

### **PROGRAM AND EVENT:**

#### **1. Event Management Software**

- Proficiency in use of CVENT ([www.cvent.com](http://www.cvent.com)) and Crowd Compass ([www.crowdcompass.com](http://www.crowdcompass.com))

#### **2. Call for Papers**

- Create and coordinate all timelines for key benchmark dates.
- Complete training on CVENT Abstract Management System
- Design the functionality needed to add custom questions, scoring, submission process, content review, etc.
- Develop, test and navigate functionality of CVENT Abstract Management System.
- Provide Call for Papers link to CalABA for distribution
- Production coordination of marketing/collateral materials for conference.

***All print pieces shall receive approval from CalABA prior to printing***

#### **3. Continuing Education**

- Coordination of CE units with CalABA Professional Standards Committee and Conference Committee for event.
- Work closely CalABA Professional Standards Chair to determine eligibility of CE units earned for each session.

- Provide information to CalABA IT for integration into CrowdCompass application.
- Update Continuing Education Certificates design in Cvent.
- Collaborate with CalABA staff and Cvent OnArrival application to manage conference session scanning.

#### **4. Website**

- Oversee and direct the Cvent Event Builder staff assigned for the development of the CalABA website.
  - This includes submitting the event build form to CVENT and will include all the specifications for the website.
- Create, coordinate, and monitor all timelines for key benchmark dates related to website development.
- Provide all updates from prior conferences to CVENT Event Builder (fees, custom questions, sponsorship updates).
- Review and provide edits on content for 2020 attendee website (includes all web pages/tabs, registration paths, confirmation emails)
- Review and provide edits on content for 2020 sponsorship/exhibitor website.
- Review, input and collaborate with Cvent, CrowdCompass and the CalABA team to launch, write content for website pages.

#### **5. Conference Events**

- Coordinate and facilitate all logistical and planning needs with the selected conference facilities.
- Monitor room blocks and provide client with online reports and a final pick-up report after the conference.
- Coordinate conference food and beverage with facility staff and conference vendors to conference specifications.
- Overall venue contract management.
- Ensure accuracy of post-conference billing and submit to CalABA for payment as contracted.
- Facility coordination of all conference/visual needs.
- Scheduling, communication of room assignments with hotel staff.
- Hotel reservations for selected invited speakers, VIP, and CalABA staff.
- Coordinate event needs for ancillary conference events including, but not limited to: Job Fair, Grad Expo, Red Carpet Reception and Awards Ceremony, with facility and CalABA staff.
- Compile and distribute room monitor packets for conference sessions.

#### **6. Volunteers:**

- Assist the CalABA Volunteer Coordinator to manage 100+ onsite volunteers. This will include reviewing the schedule compiled by the coordinator, assisting with volunteer placement, and monitoring on-site schedule of volunteers.
- Monitor assignments to ensure key event planning staff and CVENT staff are assigned to larger breakout rooms to be point of contact for volunteers.
- Collaborate and scheduling of volunteers with conference volunteer coordinator.

**7. Registration:**

- Monitor and coordinate with CVENT and CalABA staff the online registration system.
- Provide updates and data pulls from the system as necessary.

**8. Financial:**

- Reconciliation of all final expenses incurred as identified in the project budget.
- Final invoicing.
- Review assigned conference expenses paid for directly by CalABA.

**9. On-Site**

- Provide all on-site logistical coordination and management (including facilities, audio/visual, and point of contact for all speakers, client staff, and attendee questions or requests), manage on-site registration support services, manage the on-site technical team, including the oversight of CVENT OnArrival team.
- Include additional staff support as necessary to expedite registration check-in, walk-up on-site registrations and CEU assistance.

**10. Promotion:**

- Develop and distribute sponsorship prospectus.
- Contact and confirm exhibitors and sponsors.
- Coordinate exhibit placement with facility staff.

**11. Client Updates/Emails/Conference Calls:**

- Coordinate and participate in planning meetings via teleconference call/emails.
- Provide regular progress reports and updates to the CalABA staff.

**ADDITIONAL RESPONSIBILITIES OF THE CONTRACTOR:**

- The Contractor shall perform the scope of services, as contained in the RFP specifications. This list of services shall not be deemed to be all-inclusive, and may be changed from time to time as authorized by CalABA Board of Directors or staff.
- All correspondence shall be directed through the CalABA Executive Director, or designee.

**RESPONSIBILITIES OF CalABA:**

- CalABA shall designate CalABA Executive Director as the “lead” staff person to coordinate with the Contractor; however, other individuals may be designated by CalABA Executive Director from time to time.
- CalABA shall have appropriate staff available as may be required to discuss issues with the Contractor, particularly during the 3 months leading to the conference dates.
- CalABA shall use its best efforts to cooperate with the Contractor in providing the information and documentation necessary under this contract.

**Contractual Relationship**

It is an express covenant of this RFP that CalABA will be solely responsible for direct communications with its membership unless otherwise directed. Any actual or attempted communication by the Contracting Party with membership without written consent shall be a violation of this covenant and shall be cause for termination.

## **II. Minimum Required Information and Documentation**

All RFP's shall include at a minimum the following information/documentation:

- All proposals must be submitted as specified on the proposal pages that follow. Any attachments must be clearly identified. To be considered, the proposal must respond to all parts of the RFP. Any other information thought to be relevant, but not applicable to the enumerated categories, should be provided as an appendix to the proposal.

### **Professional Liability Insurance**

- The individual or organization is to provide, at own expense, a comprehensive general liability insurance policy including professional liability, insuring against any and all claims for bodily injury or death resulting from performance and services by the employees, staff and agents.
- Upon execution of a contract, Contracting Party will name California Association for Behavior Analysis, 400 29<sup>th</sup> Street Suite 518, Oakland CA 94609, as an additional insured on his or her professional liability insurance, with minimum coverage of \$1,000,000 per occurrence and \$3,000,000 annual aggregate.

## **III. Proposal Structure**

The proposal must follow the format and order outlined below. An RFP response that fails to follow the submission format may be excluded from further review.

### **Format**

Proposals must be prepared simply and economically, providing a straightforward, concise description of the provider's ability to meet the requirements of the RFP. The provider shall organize the proposal in the same order as presented in the RFP and clearly label each section and subsection with the headings as they appear in the RFP. Any additional information must be referenced in the body of the response and attached to the end of the document after the required attachments.

If you have responded to a requirement in another section of your proposal, please make reference to that section and do not repeat your response. A representative who is authorized to contractually bind the Contractor shall sign the proposal. The proposal must include the information requested below. Information should be complete and demonstrate that the Responder can perform professional work. Each attachment must reference the corresponding section or subsection number to which it corresponds.

#### **a. Introduction**

Prepare a brief introduction including a general demonstration of understanding of the scope and

complexity of the required work.

**b. Personnel**

List key personnel who will be assigned to this program. Include personnel (administrative and clinical) responsible for supervision and service provision of the program. Provide resumes for the key personnel. Identify those individuals who will serve as contact persons for the management of the contract.

**c. Experience**

In this section, list recent work related to this proposed effort and include any examples of similar contracts.

**d. Rate Proposal**

Please include a detailed rate proposal for all services respondent is applying for.

**e. Business Structure**

Provide the following documentation:

- Client References and Successes
- Proof of incorporation
- Current Tax Identification Number
- Copies of applicable licenses and/or certifications

**\*CalABA is not liable for any costs incurred by applicants for work performed in preparation of a response to this RFP\***

#### **IV. EVALUATION OF PROPOSALS**

The proposals will be evaluated by a committee of CalABA Board members and executive staff based upon information supplied by each Responder to this RFP and the following criteria:

- Ability to meet all minimum qualifications.
- Experience of the firm in providing similar services to other public and private entities.
- Qualifications and experience of the lead professional.
- Qualifications and experience of the other members of the professional's firm.
- The rate structure proposed.

#### **V. Submission**

All submissions must be received by 4:00 PM on 4.26.19 at which time the request for proposals will end. Submission must be made via email.

Please submit proposals to:

California Association for Behavior Analysis

Matt McAlear, Executive Director

Email:

info@calaba.org

Subject Line: RFP #04-2019