



LINKED LEARNING  
ALLIANCE

**Request for Proposal – Event Planning and Management Vendor**

2018 Linked Learning Convention  
February 12-14, 2018  
Anaheim Marriott Hotel  
Anaheim, CA

The Linked Learning Alliance is issuing a Request for Proposals (RFP) to solicit proposals from event planning and management vendors for the 2018 Linked Learning Convention. The Alliance is seeking proposals that include excellent value for comprehensive services, including meeting planning, creative production value, event execution, and follow up accounting.

The 2018 Linked Learning Convention will convene between 800 and 1000 attendees in Anaheim, CA from February 12-14, 2018. The event is anticipated to feature approximately 100 breakout sessions, 4 plenary sessions, 8 site visits, an exhibit hall, and other special features.

**Proposal Submission Deadline: Friday, March 31, 2017 at 5 p.m. PST.**

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## 1. Organization Information

### a. Organization Overview

The Linked Learning Alliance is a 501(c) 3 nonprofit that serves as a statewide coalition of education, industry, and community organizations dedicated to improving California's high schools and preparing students for success in college, career, and life. Established in May 2008, the Linked Learning Alliance aims to build a collective voice and coordinate efforts to expand access to Linked Learning—an approach to high school that integrates rigorous academics with real-world learning opportunities in fields of engineering, health care, performing arts, law, and more.

As the central hub of the Linked Learning movement, the Alliance coordinates and connects efforts to advocate for students' access to high-quality Linked Learning options. Working with partner organizations and districts, the Alliance educates policymakers and the public about Linked Learning's potential to transform the lives of students and support the larger economy. It also serves as a hub for sharing information among member organizations about Linked Learning advocacy and implementation efforts, and work closely with post-secondary institutions and industry partners to increase college and career opportunities for Linked Learning graduates.

The Linked Learning Alliance works with district, post-secondary, industry, and community partners to develop a range of communications, policy, curriculum and technology resources to support high-quality Linked Learning pathways. The Alliance currently has 11 full-time staff and is based in Sacramento, CA.

### b. Event Overview

The Linked Learning Convention is an annual convening of leaders in education and industry, as well as policymakers, researchers, and philanthropists. This Convention provides a unique experience for collaboration, meaningful professional learning, and strategic networking aimed at ensuring all students are well prepared for college, career, and life.

The Linked Learning Convention typically convenes between 800 and 1000 attendees over the course of a 3-day conference. The Convention switches locations every year between Northern and Southern California. The 2017 Linked Learning Convention was hosted in Oakland, California on January 23-25, 2017 and featured 90 breakout sessions, 4 plenary sessions, 6 site visits, 10 exhibitors, and convened nearly 900 attendees. The 2018 Convention will be hosted in Anaheim, CA from February 12-14, 2018 at the Anaheim Marriott.

### c. Key Event Features

#### *Plenaries*

The Linked Learning Convention typically includes plenary sessions during each day of the Convention. These occur during breakfast and/or lunch and serve as a gathering focal point for all conference attendees.

#### *Breakout Sessions*

The breakout sessions are the key driver of the Convention where educational leaders, researchers, policymakers, and educators host one hour and 15 minute sessions on topics related to Linked Learning career pathways. In 2017, the Convention hosted nearly 90 breakout sessions over the course of the three day event.

### *Receptions*

The Convention typically hosts two receptions during the first and second evening of the 3 day conference that are open to all attendees, and one VIP reception for select partners and sponsors. The VIP reception is included as a sponsorship benefit for our title sponsor.

### *Site Visits*

Each year the Convention facilitates between 6-10 site visits during the first day of the event. These site visits take place at schools and community based organizations within the region of the conference and will be decided upon by Linked Learning Alliance internal staff and close partners. The site visits each require transportation for participants from the hotel to the designated site and back, as well as a boxed lunch for each participant. We expect the management vendors to manage the all bus transportation and lunch vendors.

### *Exhibition Hall*

In 2017, the Convention introduced an exhibition hall as a feature of the event, which included 10 exhibition booths at a price of \$1,000 each. The Linked Learning Alliance would like to expand the exhibition hall this year to include more booths and get more creative about the types of exhibitors featured at the convention and including student presence.

### *Student Internships*

An important aspect of the Convention is student voice and involvement. As the Linked Learning Alliance works to scale high-quality career pathways in public education, our organization makes a point to hire high school students to help staff the Convention in the areas of crowd management and hospitality. We ask that all vendors provide student interns with an informational interview during their time at the convention.

#### d. Overview of 2018 Convention Goals

- Register 900-1000 paid Convention delegates Expand Exhibition Hall with paid exhibitors
- Reinvent the plenary session programming
- Generate net revenue of at least \$20,000,000

## 2. Statement of Work

### a. Purpose

This purpose of this Request for Proposals (RFP) process as due diligence to ensure that the convention is managed by an event planning and management vendor that provides excellent value and service. This document includes the requirements necessary for a successful conference.

### b. Scope

The Linked Learning Alliance will have internal staff as resources for some aspects for the event, such as development of theme, session content development, sponsorship solicitation, and marketing and communications to promote the convention. The event management vendor will be responsible for pre-event planning, budgeting, delegate registration and billing, managing breakout session call for proposal process, researching appropriate convention app and other technology, providing technical support for such technology, negotiating with vendors, hotel and vendor management, and on-site event management. The event management vendor will be expected to work collaboratively with Linked Learning Alliance staff. Please see further details in "Scope of Work" section.

### c. Project Schedule

This schedule is based on our current timeline, but subject to change.

Project Milestones	Deadline
RFP Open Date	Thursday, March 16, 2017
RFP Close Date	Friday, March 31, 2017
Start Vendor Evaluations	Monday, April 3, 2017
Award Contract to Vendor	By end of April 2017

### 3. Proposal Submission Procedure

#### a. Vendor RFP Reception

By responding to the RFP, the vendor agrees to be responsible for fully understanding the requirements or other details of the RFP, and will ask any questions to ensure such understanding is gained. The Linked Learning Alliance retains the right to disqualify vendors who do not demonstrate a clear understanding of our needs. Furthermore, the right to disqualify a vendor extends past the contract award period and the Linked Learning Alliance will not be at fault, cost, or liability.

#### b. Good Faith Statement

All information provided by the Linked Learning Alliance is provided in good faith. Specific items are subject to change at any time based on business circumstances.

The Linked Learning Alliance does not guarantee that any particular item is without error.

#### c. Communication & Proposal Submission Guidelines

Communications should not be effective, unless a specified procurement executive who is responsible for managing the RFP process formally confirms these communications in writing. In no case shall verbal communications govern over written communications.

**Please submit your proposal by close of business Friday, March 31.**

**Please send questions related to this RFP, and vendor proposals to:**

Kelly Reynolds  
Program Associate  
Linked Learning Alliance  
[kelly@linkedlearning.org](mailto:kelly@linkedlearning.org)  
916.248.4848

#### d. Evaluation Criteria

All proposals will be evaluated systematically, based on the following key criterion. The purpose of this section is to identify suppliers with interest, capabilities, and financial ability to manage our conference, as defined in the "Scope of Work."

Key evaluation criterion include: capabilities demonstrated through past events, budget, depth of capabilities and partners, quality of event, destination/tour management, creativity in production value, and customer service.

#### e. Short-list Selection

Vendors who have demonstrated their capacity to meet our needs will be contacted via email to be notified of their selection to move forward in the RFP process. Vendors who have not been selected will not be contacted.

#### 4. Scope of Work & Business Requirements

The Linked Learning Alliance will require the event management vendor to manage the following aspects of the event:

##### a. Plan

###### i. Destination Selection

Work with the Linked Learning Alliance to identify and book conference venues in California to select location for 2019 Convention.

###### ii. Pre-Event Schedule

Create project schedule with key deadlines and milestones for the convention.

###### iii. Budget

Manage overall budget for throughout the planning stages.

###### iv. Conference Schedule

Work with our internal staff to create daily schedule of keynotes, breakout sessions and speakers.

##### b. Event Promotions

Linked Learning Alliance internal staff will coordinate and distribute email and other marketing to promote the convention to partners and larger networks.

##### c. Registration

Registration will be facilitated and managed by the event management vendor. Linked Learning Alliance internal staff will manage and maintain the website that the registration portal is hosted on. The event management vendor will be responsible for processing registration, collecting registration fees via credit card and payment orders, reporting registration numbers to the Linked Learning Alliance, handling changes in registrations, and printing name badges for participants.

##### d. Event Plan & Logistics

###### i. Mobile App and Website

The Linked Learning Convention hosts all of its scheduling of event programming on a mobile app. The event management vendor will provide cost-efficient and user-friendly mobile app and website options for the convention. The technology must be able to integrate with an online breakout session proposal selection process.

###### ii. Food and Beverage Negotiations

The event management vendor will work with the convention site to plan meal and reception options and negotiate best value for food and beverages offered during the Convention.



- iii. **Plenary Production**  
Event management vendor will provide recommendations on the overall production value of plenary session.
  - iv. **On-Site Signage**  
Provide recommendations on locations of on-site signage to maximize traffic flow and crowd management.
  - v. **Audio Visual**  
Event management vendor will work with A/V contractor/hotel for all audio/visual requirements, and provide onsite management of vendors
  - vi. **Photography & Videography**  
Provide budget conscious recommendations for event photographers and videographers. Linked Learning Alliance internal staff will oversee the photographer during the event.
  - vii. **Staff Coordination**  
Work with Linked Learning Alliance staff to regularly check in regarding planning and production updates.
- e. **Facilities**
- i. **Conference Facility**  
Event management vendor will manage all required spaces, meals, and vendors for the Convention and regularly communicate updates to Linked Learning Alliance staff.
  - ii. **Accommodations**  
Ensure hotel booking and local hotel overflow options for convention registrants with online and phone booking options. Hotel overflow options should be comparable to the main event hotel in terms of pricing and quality.
- f. **On-Site Management**
- i. **Registration**  
Event management vendor will manage on-site registration during the entire convention, including sign-in, name badges, corresponding check-in information and materials, and swag item distribution.
  - ii. **Daytime & Evening Events**  
Manage on-site logistics related to hotel management, room set up and break down, oversight of student interns, and general run of events to ensure a smooth convention.
- g. **Destination Management**
- i. **Site Visit Logistics**  
Identify and manage bus transportation and box lunch vendors for site visits. Communicate with both vendors on scheduling, pick-up, and drop-off times and locations.

**h. Creativity**

Provide Linked Learning Alliance staff with new and creative perspectives and ideas on how to improve overall production value of plenary sessions in a cost effective manner.

**5. Vendor Information**

**a. All vendors must submit the following information:**

- i. **Corporate Overview** – Legal name; year of incorporation; number of employees.
- ii. **Services** – description of all services and recommendations of products supplied, including mobile app.
- iii. **Markets Served** – description of geographic/industry markets served.
- iv. **Partners** – list of current event-related vendors and partners.
- v. **Customer and Event References** – a list of other similar events (in scope and industry).

**6. Estimated Budget & Resources Required**

- a. All vendors must provide a breakdown of costs related to management of the event as outlined in the “Scope of Work.” Vendor must agree to keep the quoted pricing in their proposals for a minimum of 90 days after proposal submission.
- b. All proposals must include a project schedule and work breakdown structure, which identifies timelines, key milestones, project phases, number of dedicated staff, and other project plan information.
- c. Finally, tell us what sets your company apart from the rest – do you provide above and beyond customer service, innovative event ideas, or top notch logistical management? We would like to hear what prides you the most about your service.