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# Request for Proposals

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Conference Planning  
Services for Ontario  
University Registrars'  
Association

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December 21, 2012

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## **1. SUMMARY**

The Ontario University Registrars' Association (OURA) is accepting proposals for a multi-year contract to provide conference planning services.

OURA is an association of Ontario university registrars, admissions, records, computer systems, recruitment, financial aid, graduate studies and other university personnel involved in registrarial work. As part of our mandate to provide professional development opportunities for our members, we hold an annual conference for our membership.

The purpose of this RFP is to provide a fair evaluation for all candidates and to provide the candidates with the evaluation criteria against which they will be judged.

## **2. PROPOSAL GUIDELINES AND REQUIREMENTS**

This is an open and competitive process. Proposals received after <<deadline>>, will not be considered and will be returned unopened.

The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.

If you wish to submit alternate solutions, please do so.

The price you quote should be inclusive. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.

If the execution of work to be performed by your company requires the hiring of sub-contractors you must clearly state this in your proposal. Sub-contractors must be identified and the work they will perform must be defined.

Provisions of this RFP and the contents of the successful responses are considered available for inclusion in final contractual obligations.

## **3. CONTRACT TERMS**

The Ontario University Registrars' Association will negotiate contract terms upon selection. All contracts are subject to review by the Executive Director of the Council of Ontario Universities and a project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items.

The Council of Ontario Universities requires that suppliers maintain comprehensive general liability insurance in accordance with the overall monetary value of the services being provided.

## **4. PURPOSE, DESCRIPTION AND OBJECTIVES**

## **Purpose**

The Ontario University Registrars' Association (OURA) provides professional development opportunities through sharing information about effective practices in the conduct of the multi-faceted registrarial enterprise. The OURA executive committee is mandated to plan the annual general meeting and conference. The conference planner oversees and implements all aspects of the conference planning process, in support of the OURA executive.

## **Description**

OURA executive committee members volunteer their services to OURA elected from the membership of various Ontario universities. Their roles are conducted over and above their daily job duties and careers. Therefore the objective of the conference planner is to manage and conduct all aspects of the conference planning process on behalf of the OURA executive committee from preparing a budget to providing a framework for programming of the conference content to registration and on-site coordination.

The successful conference planner will provide conference planning advice to the OURA executive committee, take direction on conference requirements and implement the conference plans. The multi-year commitment allows for continuity of approach and a historical perspective of successfully conducted conferences as the OURA executive committee changes their membership on an annual basis.

## **5. TIMELINE**

- This RFP is dated December 21, 2012
- Proposals are due no later than January 21, 2013 5:00PM in the format specified in section 12.
- Proposals will be evaluated immediately thereafter. During this time we may require interviews with our evaluation team during the first half of February 2013. You will be notified if this is requested.
- The name of the candidate firm who has been selected will be decided on or about February 15, 2013
- Negotiations will begin immediately with the successful candidate and should conclude no later than March 31, 2013.
- All other candidates will be notified by March 31, 2013
- Planning for the 2014 OURA annual general meeting and conference will begin in June 2013 with the newly elected OURA executive committee

## **6. PRICING**

Please provide all pricing details for the services as outlined in your proposal. If pricing excludes fees or charges, please provide a detailed list of excluded fees with an explanation of the nature of those fees.

## **7. BACKGROUND INFORMATION**

OURA convenes an annual general meeting and conference usually in February or March of each year in Southern Ontario. Historical information regarding the conference is outlined below.

### **Planning Process**

The OURA executive committee is elected on an annual basis as part of the annual general meeting. Usually by May or June the new committee will be convened at which point they will commence working with the conference planner on the upcoming conference. The planning process includes the following elements: reviewing feedback/surveys from the past conference, deciding on the conference format and length, determining timing options, providing direction on desired venue locations, setting an overall theme for the event, determining plenary and/or keynote speaker options. OURA sub-committees each bring forward proposed presentations and/or workshops through their committee work. These elements plus input from the conference planner are incorporated in planning the event.

### **Duration**

The annual conferences normally run from 2 ½ to 3 days depending on the venue and programming. Historically we have run the conference in a number of formats including offering pre- or post-conference workshops as an option for attendees.

### **Registrants**

On average the conference registers 200+ attendees. Historically we have offered a variety of registration options. Attendees may register for the full conference, conference plus pre-conference workshops or single days.

### **Programming**

Programming typically includes two or three plenary sessions and/or keynote speakers, workshops, roundtables, and presentations. Except for the plenary speakers, the workshops and presentations are solicited through calls for presentation sourced through various OURA sub-committees as well as the executive committee. Programming also includes the association's annual general meeting and election, closed to members only, as well as an awards dinner for recipients of our special OURA awards. For examples of past conference programs, visit our website archive at <http://www.oura.ca/conference/program.html>.

### **Venue**

OURA seeks out venues which provide the facilities for our programming as well as social opportunities for attendees and easy access to accommodations. We work to vary our locations on an annual basis to make attendance and travel affordable to a majority of our membership. Venues which are located within easy access to most universities attract single day in addition to full conference attendees thereby maximizing professional development opportunities. OURA conference venues have included resorts, dedicated conference facilities, and hotels throughout Southern Ontario.

## Conference Pricing

The registration fee for attending the full conference is approximately \$700 on average. Pricing for partial and/or day-only attendance is also made available. As our attendees are from publicly funded educational institutions, it is important to keep registration fees reasonable and affordable in order to make the conference accessible to a wide range of attendees and to fit within the budgetary constraints and guidelines of the universities.

## Sponsorship

OURA conferences historically have not included large scale vendor exhibit halls as our primary purpose has been to provide professional development and networking opportunities. We have worked with a small number of sponsors and provide some exhibit space to them during portions of conference programming. However, our membership has expressed interest in expanding access to vendors at our conferences and therefore plans for the future will include developing these opportunities further. The conference planner has been involved in developing the sponsorship packages, soliciting vendors and sponsors and managing their logistical needs.

## Social Events

Part of the conference objective is to encourage networking among attendees. Therefore we generally provide time in our programming for social opportunities such as dinners, receptions, and “dine-around’s” suggested and facilitated by the conference planner.

## 9. SCOPE & GUIDELINES

The following outlines the scope of the request for proposal for conference planning services.

### Multi-Year Contract

The proposal must encompass services that will be provided over 5 years commencing in the spring of 2013 for the planning of the 2014 annual conference up to and including the planning and execution of the 2018 annual conference. The structure of the contract is a “2+1+1+1” model with a contracted ed minimum of 2 conferences and subsequent annual renewals for up to 3 additional conferences upon review and approval by the incoming OURA executive.

### Conference Planning

The proposal for services must include the following aspects of the planning process:

- Planning Meetings: attend meetings with the OURA executive to facilitate discussion on conference theme, desired locations, timing, format and other parameters use for the purposes of conference planning
- Budgeting: prepare a proposed budget including anticipated revenues and expenditures based on programming and venue options and within guidelines and parameters set by the OURA executive
- Structure: provide a programming framework for the use of committees in planning speakers, workshops and in-conference events based on guidelines set by the OURA executive

- Continuity: maintain a historical archive of conference planning information for purposes of providing advice to the incoming OURA executive on an annual basis
- Feedback and Surveys: develop a process for soliciting feedback from attendees and gathering results in order to provide input into future conference planning

## Venues

- Solicit proposals from various venues and negotiate contract with venue and/or related contractors for all aspects of the conference including:
  - o Arranging for adequate conference and meeting space, facilities and equipment
  - o Negotiating hotel room rates for attendees as well as complimentary rooms, discounts and upgrades as appropriate
  - o Arrange for all food and hospitality requirements including snacks, breakfasts, luncheons, receptions and dinners as required through conference programming
  - o Identify transportation needs such as shuttles, busses etc. as may be required due to venue
  - o Arrange for the accommodation of special needs of attendees related to their mobility and/or special dietary requirements
  - o Procure audio-visual equipment and service providers as appropriate including arrangements for visual projection equipment, microphones, and internet connections

## Speakers and Moderators

- Propose potential plenary and/or keynote speakers to the OURA executive suitable to the conference theme and budget
- Contact and liaise with speakers on behalf of the OURA executive to finalize all arrangements including accommodations, transportation, audio-visual and other needs in accordance with the negotiated terms of the speaking engagement
- Ensure moderators are secured for each session and prepare moderator packages for use at the conference

## Conference Program and Registration

- Coordinate all programming details and content for publication on the OURA website as well as for print including:
  - o Session details ,speaker names and bio's, times and room locations
  - o special event details, information on meals, receptions and award dinner
  - o general meeting information such as committee reports and updates
  - o annual election details
  - o exhibitor and sponsorship information
  - o other content as provided by the OURA executive committee
- liaise with the program printer as identified by the committee to provide content within necessary timelines for printing and delivery
- Work directly with the OURA website administrator to post conference information and programming details on the OURA website within the agreed-to timelines

- Propose registration kits and conference giveaways in consultation with the OURA executive including purchasing of items on OURA's behalf and all logistical coordination including assembling the registration kits and distributing them onsite.
- Source a supplier to enable online conference registration, negotiate contract details towards ensuring a streamlined process for collection of fees and the planning of session attendance; track and report regularly to the executive re the progress of conference registration and propose strategies for increased promotion/communication to members if required

### **Vendor Sponsorships and Displays**

- Propose and develop sponsorship packages and opportunities on behalf of the OURA executive
- Solicit vendors and sponsors and negotiate their participation on behalf of OURA executive
- Liaise with vendors and work with them to secure exhibit space and plan and oversee logistical details of setup and takedown as appropriate.

### **On-Site Coordination**

The conference planner must provide on-site coordination for the duration of the conference and including days required for setup in advance and wrap up after completion. This includes:

- On-site liaison with the venue conference management and staff to oversee all logistical details and locally manage any unforeseen issues and requirements
- Provide a welcome and/or conference registration function
- Assemble and distribute registration kits and conference programs to attendees
- Ensure speakers are aware of their rooms and times and that their on-site presentation and audio-visual needs are met
- Ensure moderators receive their moderator packages and are aware of the details of their appointed sessions
- Provide regular updates to OURA executive committee members on status of conference

### **Post Conference Reporting and Follow Up**

Feedback from the planner and from membership is integral to ensuring that future meetings continue to be meaningful and valuable. Therefore, the conference planner must be able to:

- Develop a method for collecting feedback from attendees
- Provide a full report to the OURA executive of the conference success and any issues/concerns that must be addressed
- Liaise with suppliers on behalf of OURA to ensure that all supplier invoices are received by the OURA treasurer for payment and settlement in a timely manner

## **10. QUALIFICATIONS**

The conference planner must demonstrate the following qualifications:

- minimum of six years conference and/or event planning experience
- experience planning conferences with volunteer and/or not-for-profit organizations; planning conferences related to the education sector is preferable
- familiar with the process of seeking out and securing plenary speakers
- experience with on-site conference coordination
- established contacts within the areas of hospitality, event-planning, sound and video providers, registration suppliers

## **11. EVALUATION CRITERIA**

The proposal will be evaluated on the following key components:

1. Demonstrated experience in planning multi-day conferences and workshops particularly with not-for-profit and/or volunteer organizations
2. Pricing which is in keeping with OURA's overall principles of providing conferences to its members at a reasonable cost and within the budgetary constraints of OURA's financial model.
3. Proposal provides for the maximum number of services outlined within the RFP. The proposal's contents will be compared against the full list of scope and guidelines contained in this RFP.
4. Given the nature of this contract as a multi-year service agreement, the provider must be able to demonstrate a plan for continuity and contingency over those years so as to minimize risk to OURA and its membership.
5. Proposals will be ranked and the top three may be contacted to provide further information for the purposes of ensuring all conditions can be met.
6. Ability to abide by the COU's contractual requirements of suppliers. Specifically,;
  - a. Supplier must maintain registration with the Workplace Safety and Insurance Board and to maintain WSIB coverage for its employees
  - b. Supplier must carry Comprehensive General Liability insurance in the amount of \$2,000,000 per occurrence and supply COU Holdings with proof upon request

## **12. FORMAT OF PROPOSAL**

The proposal must be provided in the form of a written report/proposal and must contain the following at a minimum:

- A complete list of the services to be provided within the service agreement
- List of three references and/or written testimonials from previous and existing clients
- Full pricing details within the guidelines of this RFP
- Information about yourself and your organization including key individuals involved in the planning of conferences

- Information regarding sub-contractors used to provide these services
- Examples of previous conferences planned including: conference programs, websites, feedback and surveys from attendees, description of the full scope of your role in planning the conferences
- Sample list of contacts and/or sources relevant to this proposal
- Proof of general liability insurance cover as required by the COU
- The proposal must be provided in an electronic format (.pdf) by e-mail to the V-P OURA, Lucy Bellissimo at [lucybell@yorku.ca](mailto:lucybell@yorku.ca) no later than 5:00PM January 21, 2013. A signed proposal in hard copy must also be mailed to the following address shortly thereafter:

Lucy Bellissimo  
York University  
4700 Keele Street  
W223 Bennett Centre for Student Services  
Toronto, ON M3J 1P3