



Request for Proposals

APHEO Conference Planning Services for 2020-2022 inclusive

Association of Public Health Epidemiologists in Ontario

www.apheo.ca

April 3, 2019

1. Overview and Background	1
2. Proposal Guidelines and Format	2
3. Request for Proposal Timeline	2
4. Duties	3
5. Qualifications	5
6. Proposal Evaluation Criteria	5
7. Send Proposals To	5



Request for Proposals Conference Planning Services

1. Overview and Background

The Association of Public Health Epidemiologists in Ontario (APHEO) is currently accepting proposals for conference planning services for its annual events in 2020, 2021 and 2022. The purpose of this Request for Proposals (RFP) is to solicit proposals from various candidate organizations, conduct a fair and extensive evaluation, and to provide candidates with the evaluation criteria against which they will be judged.

About APHEO

APHEO is a not-for-profit association comprised of approximately 300 epidemiologists, health analysts, program managers, research assistants, students and other members interested in public health epidemiology. Formed in 1991, APHEO's mission is to advance and promote the discipline and professional practice of public health epidemiology in Ontario. The goals of the association are to:

- Increase the capacity of APHEO to advance and promote epidemiology in the public health system;
- Promote professional opportunities for current and new public health epidemiologists;
- Support and advance knowledge exchange among public health epidemiologists;
- Develop and enhance linkages across policy, practice, training and research; and,
- Build and promote tools and resources that support the practice of public health epidemiology.

APHEO's Annual Conference or Workshop

The APHEO Conference Planning Committee, comprising of the conference planner, volunteer APHEO members, the APHEO Member-at-Large and Treasurer, is responsible for planning the annual APHEO conference or workshop. This event is the Association's flagship professional development and networking event, and the venue for APHEO's Annual General Meeting. In recent years, the annual conference/workshop has welcomed approximately 100 delegates from numerous public health organizations and universities in Ontario. For more information on previous events, please visit:

<https://www.apheo.ca/past-conferences-workshops>

2. Proposal Guidelines and Format

This RFP represents the requirements for an open and competitive process. Proposals will be accepted until May 10, 2019, 5pm EST. All proposals must be signed by an official agent or representative of the company submitting the proposal.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions will be subject to review by APHEO and will include scope, budget, schedule, and other necessary pertinent items.

All applicants must submit the following information in the form of a written report/proposal:

1. **Organization overview:** Information about the organization including key individuals involved in the planning of conferences.
2. **Services and costs:** Description of services offered and costs related to the general categories of duties outlined in section 4, Duties, including any sub-contractors. All costs should be itemized to include an explanation of all fees and costs.
3. **Customer and event references:** Examples of previous conferences planned including websites, client feedback, description of the scope of the candidate's role in planning the conferences.

Please also provide the name and contact information for up to three events similar in size and industry the candidate has planned and managed in the last five years. Note: References may be contacted to validate the information provided in the proposals and may be asked to rate the overall performance of the firm.

4. **Résumé(s):** of individual(s) involved in the bid, demonstrating the qualifications in section 5.
5. Proof of comprehensive **general liability insurance**

3. Request for Proposal Timeline

1. **May 10, 2019:** Proposals are due by 5pm EST in the format specified in section 2
2. **May 30, 2019:** APHEO will complete evaluations of RFPs

3. **May 31, 2019:** Successful candidate notified and contract negotiation will begin immediately
4. **May 31, 2019:** All other candidates notified
5. **June 2019:** Successful candidate prepares and distributes RFP for venue for 2020 APHEO event
6. **July 2019:** Venue for 2020 event is confirmed
7. **January 2020:** First teleconference with 2020 APHEO Conference Planning Committee

4. Duties

The conference planner retained for these events will be responsible for the following duties for each of the annual APHEO events:

1. Venue selection, contract negotiation and liaison

- a. Prepare and disseminate RFP for hotel/venue selection
- b. Evaluate venue RFPs and provide recommendations to Conference Planning Committee
- c. Make one site visit to the hotel/venue prior to contract negotiation
- d. Negotiate and manage hotel/venue contract
- e. Liaise with venue and act as a point of contact on behalf of APHEO
- f. Provide recommendations on food and beverage based on budget

2. Communication

- a. Participate in monthly (or more frequent, as required) conference planning teleconferences
- b. Provide a verbal update at conference planning teleconferences
- c. Be available by email or phone to answer inquiries within 48 hours
- d. Attend in-person meeting with conference planning committee at the venue prior to the event
- e. Attend debrief teleconference after event

3. Conference registration

- a. Assist with the development and implementation of online registration form and payment process
- b. Manage any issues arising from the online registration form / payments
- c. Oversee transfer of funds

- d. Report on number of registrants upon request
- 4. Social event planning**
- a. Research and provide recommendations for social activities for the event
 - b. Organize selected social activities, including any transportation as required
- 5. Gifts**
- a. Coordinate presenters' gift selection and purchase as required
- 6. Poster boards**
- a. Coordinate the rental of poster boards as required
 - b. Provide supplies on-site for posters to be set up, e.g., tacks, velcro
- 7. On-site services**
- a. Ensure electronic / audiovisual needs are met at the event venue, and liaise with audiovisual supplier's on-site technician immediately in response to technical difficulties that may arise and ensure that matters are resolved to the satisfaction of session presenters, facilitators and delegates
 - b. Direct and manage on-site event set-up and clean-up
 - c. Coordinate production of signage as needed
 - d. Provide office supplies/materials as needed
 - e. Liaise with venue personnel and/or provide counsel related to catering, facility management, and other relevant and required services
 - f. Liaise with venue personnel to ensure all rooms meet specified and agreed upon requirements
- 8. Marketing / promotion**
- a. Coordinate with sponsors and receive and assemble promotional items and materials
 - b. Assemble delegate packages including sponsors' promotional materials and conference programs
 - c. Print and assemble delegate name tags
- 9. Budgeting**
- a. Liaise with APHEO Treasurer to reconcile event budgets, expenses and timelines
 - b. Adhere to budget guidelines, and provide recommendations based on the conference budget

5. Qualifications

1. Minimum of five (5) years of experience in event/conference planning
2. Certification in event / meeting planning considered an asset, e.g., Certified Meeting Professional (CMP) or Certificate in Meeting Management (CMM)
3. Experience planning conferences with volunteer and/or not-for-profit organizations
4. Experience with on-site conference coordination
5. Established contacts within the areas of hospitality, event planning, audiovisual providers, registration suppliers

6. Proposal Evaluation Criteria

APHEO will evaluate all proposals based on the following criteria:

- Resources and Demonstrated Ability to Provide the Required Services (40%)
- Knowledge and Experience in Planning Multi-Day Professional Development/Educational Conferences (40%)
- Value Added Offerings (10%)
- References (10%)

7. Send Proposals To

Candidates must submit their proposals via email to:

Lydia Cheng, APHEO Treasurer, treasurer@apheo.ca

Subject title: APHEO Conference Planning RFP

Deadline: May 10, 2019, 5pm EST