

NALMS PROCEDURE FOR DEVELOPING A COMPETITIVE BIDDING PROCESS AND RFPs

There are various occasions in which the NALMS Board of Directors may wish to solicit competitive bids for services or products.

The procedure may include the following steps:

1. Identify at least three firms or individuals that would be qualified to provide the service or product.
2. Prepare a competitive RFP for soliciting services/products. The competitive RFP should include: a statement of work describing the type of service required; a proposed project schedule; a request for information on the service provider's qualifications; a request for the service provider's cost or fees; and the due date and location to submit responses.
3. Post notice of the competitive RFP to the NALMS website at least 48 hours before sending the RFP to prequalified or identified vendors. If any additional individual or firm expresses interest in submitting a proposal, they will be added to the list of potential service providers.
4. Send the RFP and any additional information needed to prepare a bid to all of the prospective service providers. While the competitive bidding process is intended to be expeditious, sufficient time should be provided for firms to submit complete responses to an RFP.
5. Document the time and date each response is received.
6. Evaluate the responses and determine which service provider's proposal most closely meets the requirements of the Competitive RFP. Enter into contract negotiations with the top finalist.
7. Prepare the contract document using a format approved by the Board of Directors and acquire signatures of both parties.
8. Document the entire selection and award process. Such documentation should include: the names of the firms contacted and/or solicited; a copy of the competitive RFP; information on how the service providers responded; an explanation of the evaluation and basis for the award decision; process; and a copy of the contract.

REQUEST for PROPOSALS to the
North American Lake Management Society (NALMS)

“Conference Planning and Management Services for the 2019 NALMS International Symposium”

DATE of ISSUE:	August 7, 2017
DATE WRITTEN QUESTIONS, CLARIFICATIONS, or SUGGESTIONS DUE:	August 18, 2017
DATE MANDATORY LETTER of INTENT DUE:	August 18, 2017
DATE of RESPONSE to WRITTEN QUESTIONS DUE:	August 25, 2017
DATE PROPOSAL DUE:	September 1, 2017

CONTACT for REQUEST for PROPOSALS:

Service Providers interested in providing these services should submit proposals via email to the Issuing Officer of the **NALMS Conference Committee** at the following address:

Attn. Issuing Officer: George Antoniou
Chair, Conference Committee
Email: info@nalms.org

Request for Proposals

Introduction: NALMS is seeking a Service Provider or Individual to provide conference planning and management services, from conception through to completion, for our annual conference. Conference Planner responsibilities include providing outstanding customer service and organizing a memorable event that meets the expectations of our membership and our Board of Directors. NALMS prefers to conduct meetings at locations that promote attendance and in the most cost-effective and environmentally sustainable way possible and all aspects of lodging and conference services should strive to achieve these objectives.

NALMS anticipates that any resulting two-year contract will begin November 2017, with an option to extend any resulting Contract for subsequent periods, adding up to no more than six years total from the beginning date of the Original Contract, by executing a signed amendment prior to the expiration of the Contract. The typical timeline for planning a NALMS Symposium begins two-years in advance. For example, final preparations for fall 2017 NALMS Symposium in Denver, Colorado will run in parallel with initiating planning/negotiating venues for 2019. The goal of the NALMS Conference Committee is to provide the contracted Service Provide with a list of cities of interest that can handle a NALMS Conference and names of any hotels, conference centers, convention centers that might be able to stage the symposium. In addition, the NALMS Conference Committee will work to develop a local host committee and team necessary to compliment contracted services.

Background: Since 1980, NALMS' premier event is our International Symposium, typically held in fall, where approximately 500 lake management professionals attend oral and poster technical presentations, hands-on workshops, field trips and discussions on managing lakes and reservoirs (Exhibit A - Attendance for last nine NALMS Symposia).

Attendees also benefit from a relatively large exhibit hall, where a wide range of vendors display the latest lake-management tools and other resources of interest. The symposium offers excellent opportunities for networking and lifelong professional associations are often forged at the NALMS symposium. For details of our most recent event see (Exhibit B - 2016 NALMS Symposium - Banff Program).

Submission of Proposals: Proposals should include the Service Provider's cost proposal and sufficient information regarding the Service Provider's ability to perform the services sought to enable NALMS to assess the Service Provider's ability to perform the work identified in the Scope of Services.

- This Request for Proposals (RFP) seeks proposals from qualified individuals/firms. The proposal should consist of a statement of qualifications and a fee proposal for services.
- Proposals should contain sufficient information to describe the services to be provided. The proposals at a minimum should address all services described below (Conference Planning and Management Services Requested), and include a detailed conference planning/implementation timeline and conference budget.

- The cost for each service listed below should be itemized with as much detail as possible. NALMS reserves the right to contract with the provider for some or all services outlined in this RFP.
- Service Providers may submit written questions relating to the interpretation of this Competitive Solicitation and the procurement process to the NALMS Conference Committee at the above Email address by August 18, 2017. Written responses to any questions received will be provided via Email by August 25, 2017 to all Service Providers that have provided a letter of Intent to Bid. Service Providers may also submit suggested modifications to the requirements of this RFP. Service Providers must submit their written questions, requests for clarifications, or suggested modifications so they are received before the date listed on the RFP cover sheet. Written responses to questions, requests for clarifications, or suggestions will be sent on or before the date listed on the RFP cover sheet to all Vendors who submit letters of Intent to Bid. NALMS written responses will be considered part of the RFP. If NALMS decides to adopt a suggestion that modifies the RFP, then NALMS will issue Addenda to the RFP.
- NALMS does not assume responsibility for the cost of preparing responses to the RFP.
- Notice of intent to award the contract will be sent by Email to all Service Providers submitting a timely proposal. If the apparent successful Service Provider fails to negotiate and deliver an executed contract within a reasonable period of time following selection, then NALMS may, in its sole discretion, cancel the award and award the contract to the next highest ranked Service Provider.

Schedule:

- The deadline for receipt of the RFP is **September 1, 2017**. Any proposal received after this deadline will be rejected and returned to the Service Provider.
- The proposals will be reviewed by the NALMS Conference Committee. Telephone interviews may be conducted with a short list of applicants, if deemed necessary. A decision will be made within 30 days of proposal submittal.
- NALMS will enter into fee negotiations with the selected Service Provider. The successful Service Provider and NALMS will then work together to develop a specific agreement for services.
- Selected Service Provider will begin services immediately upon completion of contract negotiations.

Evaluation Criteria: Proposals will be reviewed by an evaluation committee. The committee will consider all information provided in the proposal when making its recommendation and may consider relevant information from other sources, including references. The evaluation committee will award the contract to the responsible Service Provider submitting the best proposal. The lowest priced proposal is not necessarily the best proposal. The evaluation committee's selection will be subject to the final approval of the NALMS Board of Directors. The proposals will be

evaluated and a recommendation will be made using the following criteria, which are listed in no particular order and will be evaluated on the basis of:

- Qualifications - Project Manager and Personnel
- Qualifications - Experience
- Qualifications – References
- Proposed Scope of Services
- Cost of providing services

NALMS reserves the right to reject any or all proposals, in whole or in part, to advertise for new proposals, to abandon the need for such services, and to cancel this Competitive Solicitation at any time prior to the execution of a written contract.

Note: Qualification Statement and Proposed Scope of Services should be limited to 20 pages total.

Qualification Statement

Qualifications - Project Manager and Personnel:

- A. Staffing to include primary point of contact, biosketches or resumes of key personnel that highlight their experience and their assignments to this project. The capacity of the Service Provider to complete responsibilities described in the Scope of Services.
- B. Location from which work will be performed.

Qualifications - Experience of your Organization:

- C. Past experience working with other non-profit, 501(c) (3) organizations like NALMS, or similar clients.
- D. Examples of conference management of the size and scope of the NALMS Annual Symposiums. Past performance of work that is identical to or very similar to the Scope of Services identified in this RFP.
- E. Experience that demonstrates the expertise and ability of the Service Provider to provide the Scope of Services described in the NALMS Competitive Solicitation.
- F. Why your organization is well qualified, what is unique about your organization, and what special expertise you would bring to this project?
- G. Demonstrate any relevant experience in conferences of this size and scope related to organizing the event to maximizing net profit. What suggestions do you have for running a profitable conference?

Qualifications – References:

- H. Names of up to 3 references from other organizations for whom conferences have been planned.

Conference Planning and Management Scope of Services Requested

A detailed list of primary responsibilities with participating planning team members is provided in (Exhibit C - NALMS Conference Responsibilities by Team Member).

According to this conceptual outline of responsibilities, the conference planner's role is more substantial in some areas of conference planning, and less so in others, and we recognize that there may other ways of providing services which would be more cost effective and offer greater benefit to NALMS. The Service Provider is encouraged to provide alternative frameworks of conference planning as part of their response to the RFP. If the Service Provider wishes to provide bids for services beyond the scope that we have defined in these attachments for the Conference Planner (such as providing all of the Marketing and Publicity Services, or Registration Services), please clearly distinguish whether the Cost Proposal is limited to just the items in the Requested Scope for Bid (**as indicated in bold type**) or if the Cost Proposal provides for additional services.

A. Site Selection and Analysis

Conference Planner is primary lead for Task A. All items in scope requested for bid.

- Work with NALMS to determine the specifications for the conference and solicit hotel/convention space.
- Develop and disseminate a "Request for Proposal" (RFP) to search for an appropriate site that can best accommodate the conference. Conference locations should be determined at least 18 and ideally 24 months in advance of the event.
- Schedule initial site visit.
- Compile and analyze results and assist NALMS with the final selection of the site.
- Negotiate final contract and site rental contract on behalf of NALMS (e.g. hotel rooms, meeting space, exhibit space, AV and associated services).
- Visit site at least two months prior to conference to review meeting space specifications.
- Maintain communication of all site selection activities with the NALMS conference committee and staff members.

B. Site Coordination

Conference Planner is primary lead for Task B. All items in scope requested for bid.

- Arrange necessary details with the facility and serve as liaison with the facility throughout the planning phase and the event.
- Create a master space grid, in coordination with NALMS Conference Committee, to communicate all event set up needs, including meeting room configurations, audio visual requirements, food and beverage.
- Solicit AV bids for set-ups, screens, plenary sessions and special events from in-house and external providers; choose provider; update AV order as program information becomes available.

- Monitor room pick-up and manage/balance block to accommodate demand. Solicit overflow blocks if necessary.
- Create conference menu plan, review and approve order, set minimum guarantee.
- Attend pre-conference meeting with hotel/facility staff.
- Review final bill from facility for accuracy.

C. Marketing and Publicity

Conference Planner led item(s) for Task C - to be included in requested scope for bid

- Develop a marketing plan.

Note: NALMS Conference Committee and Conference Planner are primary leads for Task C with assistance from the Local Committee and in coordination with NALMS Staff. Below four items in scope not requested for bid, although a bid may be provided. Selected conference planner will be expected to provide input to NALMS Staff and the Local Committee on the following items:

- Establish schedule for conference communications (call-for-presentations, brochure, email and grassroots marketing efforts).
- Develop and host conference website, including content and layout, and maintain updates.
- Create the final conference program or proceedings for distribution to attendees.
- Determine signage plan for the event and production of all signs including directional, informational and sponsor recognition signage.

D. Exhibitor/Sponsorship Coordination

Conference Planner led item(s) for Task D - to be included in requested scope for bid

- Determine exhibition/meal space placement; serve as liaison between hotel/facility, exhibition services provide and, if necessary, fire marshall or similar safety representative.

Note: NALMS Exhibitors/Sponsorship Committee Member is primary lead for Task D with assistance from the Local Committee and in coordination with the Conference Planner as needed. Below four items in scope not requested for bid, although a bid may be provided.

- Create and mail exhibitor show-booth prospectus, if necessary.
- Respond to inquiries for exhibit space and follow up with leads.
- Receive exhibitor registrations and payment; maintain database of exhibitor responses and provide regular updates and financial summaries.
- Act as primary liaison with exhibitors and communicate details with regards to booth space assignment and any other set-up information.

E. Presenter Coordination

Conference Planner led item(s) for Task E - to be included in requested scope for bid

- Communicate with hotel to ensure that AV and set-up needs are met.
- Assign meetings/workshops to meeting spaces based on needs and expected attendance.
- Coordinate presentation uploads at conference venue.

Note: NALMS Staff is the primary lead for Task E in coordination with the Conference Planner. Below five items in scope not requested for bid, although a bid may be provided.

- Coordinate on-line submissions of abstracts.
- Manage all necessary aspects of speaker coordination (notice of acceptance, letters of confirmation, travel needs).
- Maintain database of speaker information, sessions, special requests, audio-visual (AV) set-up needs.
- Assist in recruiting AV volunteers and provide on-site training for volunteers.
- Create meeting manager sheets for session moderators.

F. Program Development and Special Events

Conference Planner led item(s) for Task F - to be included in requested scope for bid

- Develop a working timeline for the event, with major deadlines and areas of responsibility.
- Develop online and/or paper evaluation forms to distribute to conference attendees and sponsors/exhibitors after the event.
- Create evaluation response reports that can be used to direct future conference education and coordination efforts.
- Attend meetings and email/phone correspondence with Conference Committee throughout the planning of the event (frequency to be determined by length of planning process and needs); host conference calls with Conference Committee.
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- Manage requests for committee or ancillary meetings at the event. Coordinate space and other needs.
- Assist with any needs for special events; i.e., entertainment, transportation to off-site location, 5K fun-run, etc.
- Help NALMS obtain the necessary insurance to cover the various venues and activities.

Note: NALMS Programming Committee Member is primary lead for Task F with assistance from the Local Committee and in coordination with the Conference Planner as needed. First five items in scope not requested for bid, although a bid may be provided.

- Work with the Conference Committee to develop the agenda of the conference.
- Assist Conference Committee and Local Committee with organization and compilation of meeting program.
- Assist Conference Committee with logistics associated with Plenary Speaker travel and logistics; also for travel and logistics of selected Society award recipients.
- Assist Local Committee with field trips, tours and activities, working with local attractions and/or a tour management company.

G. Registration Processing

Note: NALMS Staff is the primary lead for Task G with assistance from the Local Host Committee and this task requires minimal coordination with the Conference Planner. Not requested in scope for bid, although a bid may be provided.

- Develop, implement, and manage registration for attendees via fax, mail, email and on-line through a secure server.
- Respond to questions and inquiries.
- Create and maintain database of all participants.
- Manage income, process payments (credit cards and checks), collect balances due, and send invoices.
- Provide regular updates and reports of registrations to NALMS Board. Keep track of “booking pace.”
- Provide a final list of attendees within two weeks after the event (including walk-ins, and excluding no shows).
- Format and print nametags for attendees, speakers, and exhibitors, and all other participants.
- Develop and send email confirmation notices, as needed.
- Create tickets for special events, banquets, or other choices as defined on registration form.
- Coordinate any materials or gifts to handout at registration (e.g., tote bags, area information, local specialty products, travel mug, etc).
- Create onsite form, invoices & receipts.
- Event packaging/prep – including supplies, packets, special ribbons, certificates of attendance, ticket stuffing, etc.
- Train volunteer staff to assist with registration duties.

H. On-line Registration Services

Note: NALMS Staff is the primary lead for Task H and this task requires minimal coordination with the Conference Planner. Not requested in scope for bid, although a bid may be provided.

- On-line registration submission providing step-by-step on-line registration process for attendees. Registration options to be tailored for various attendee types (i.e. Speakers, General Attendees, Member versus Non-Members, Students, etc.).
- Provide registration confirmation including a detailed confirmation page at the end of the registration process, and confirmation notice by email including receipt of payment.
- Send email invitations to meeting audience; provide timely information regarding meeting as needed.
- Provide NALMS Board appropriate access to view registration progress and other data reports at any time.
- Allow on-site registration at the event in real time – to help resolve registration questions, issues; and to enter walk-ins.

I. Financial Management

Conference Planner led item(s) for Task I - to be included in requested scope for bid

- Develop a conference budget for the event, with assistance from NALMS.
- Monitor budget projections throughout the process and provide NALMS with quarterly budget updates.
- Provide thorough review of all bills from hotel, vendors, etc. for accuracy.
- Provide final financial reconciliation and detailed reporting in a format acceptable to the NALMS Treasurer and Finance Committee Chair.

Note: NALMS Staff Conference Planner, NALMS Staff and NALMS Treasurer are the primary leads for Task I in coordination with the NALMS Conference Committee. First three items in scope not requested for bid, although a bid may be provided.

- Cross check registrants with membership list to ensure appropriate fee assessment.
- Coordinate new member applications and reconcile membership fees with membership management provider.
- Establish conference accounting process to deposit income and pay bills.

J. On-site Management

Conference Planner led item(s) for Task J - to be included in requested scope for bid

- Serve as on-site manager for the duration of conference to ensure a smooth-running meeting, e.g., verify meeting room set ups, food and beverage guarantees, placement of signage, etc.

NALMS Staff led item(s) for Task J – First item in scope not requested for bid, although a bid may be provided.

- Oversee the registration area and customer service; process “walk-in” registrations, distribute nametags, packets, etc.

K. Post Conference Activities

Conference Planner led item(s) for Task J - to be included in requested scope for bid

- Provide data summaries to NALMS Staff (e.g. attendance, rooms, exhibitors, etc.).

Cost Proposal

- A. Service Provider should prepare a Flat Project Fee proposal with a **total not-to-exceed amount of \$12,000 per year and a total not-to-exceed amount \$24,000 from November 15, 2017 through November 14, 2019**. In addition to including a total fee for all services, the Service Provider should break down their total fee specific to each of the categories (A-K) identified under “Conference Management Services Requested”, since NALMS may choose to contract for all or select services.
- B. Include a detailed description of the cost basis of the agreement for the services to be provided within all the categories identified under ‘Conference Management Services Requested’ in this solicitation and how it was derived.
- C. The cost proposal can be included as an Appendix to the Qualifications Statement and Proposed Services and will not count toward the 20-page limit.

APPENDIX

Exhibit A. Attendance for last nine NALMS Symposia

521 - Banff 2016
492 - Saratoga Springs 2015
499 - Tampa 2014
391 - San Diego 2013
624 - Madison 2012
481 - Spokane 2011
369 - Oklahoma City 2010
468 - Hartford 2009
524 - Lake Louise 2008

Exhibit B. 2016 NALMS Symposium - Banff Program

Due to length of program, document provided to interested Service Providers as a PDF.

Exhibit C. NALMS Conference Responsibilities by Team Member

See provided excel document.