REQUEST FOR PROPOSALS
MEETING PLANNER
2017 ASF BIENNIAL CONFERENCE AND SYMPOSIUM

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1. Statement of Purpose

The purpose of this Request for Proposals (RFP) is for the Angelman Syndrome Foundation to obtain the services of a qualified meeting planner for the Angelman Syndrome Foundation’s 2017 biennial conference and scientific symposium. The vendor will be selected through the RFP process. This RFP will describe the minimum requirements that are necessary for a vendor to be considered in our selection process.

If selected, The Angelman Syndrome Foundation and vendor will enter into a contract.

2. Background Information

Organization Background
The Angelman Syndrome Foundation (ASF), a national 501(c)(3) non-profit organization, is the world’s largest Angelman syndrome organization devoted to improving the lives of individuals with Angelman syndrome (AS) and their families. The ASF does so through information, education, research, advocacy and support. The ASF is the largest non-governmental funder of AS-specific research. The ASF serves people with AS and their families in all 50 states and in over 50 countries world-wide.
Project Background
The Angelman Syndrome Foundation is seeking an experienced certified meeting planner for our 2017 biennial conference. A historical outline of the meeting is included below:

18 Previous Biennial Meetings and Scientific Symposia – held in various locations across the US:

<table>
<thead>
<tr>
<th>Year</th>
<th>Location</th>
<th>Title</th>
<th>Full</th>
<th>Kids</th>
<th>Scientific</th>
<th>Other</th>
<th>Total Attend</th>
</tr>
</thead>
<tbody>
<tr>
<td>1991</td>
<td>Orlando, FL</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>1993</td>
<td>Orlando, FL</td>
<td>N/A</td>
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<tr>
<td>1995</td>
<td>Colorado Springs, CO</td>
<td>N/A</td>
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<td></td>
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<tr>
<td>1997</td>
<td>Seattle, WA</td>
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<td></td>
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<tr>
<td>1999</td>
<td>Philadelphia, PA</td>
<td>The Philadelphia Experience</td>
<td>410</td>
<td>155</td>
<td>173</td>
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<td>738</td>
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<tr>
<td>2001</td>
<td>Chicago, IL</td>
<td>Ages and Stages</td>
<td>358</td>
<td>130</td>
<td>170</td>
<td></td>
<td>658</td>
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<tr>
<td>2003</td>
<td>Washington, DC</td>
<td>Progress Through Working Together</td>
<td>313</td>
<td>79</td>
<td>20</td>
<td>89</td>
<td>501</td>
</tr>
<tr>
<td>2005</td>
<td>Anaheim, CA</td>
<td>Reach For The Stars</td>
<td>331</td>
<td>109</td>
<td>30</td>
<td>181</td>
<td>651</td>
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<tr>
<td>2007</td>
<td>St. Louis, MO</td>
<td>Gateway to Knowledge</td>
<td>324</td>
<td>80</td>
<td>35</td>
<td>111</td>
<td>550</td>
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<tr>
<td>2009</td>
<td>Orlando, FL</td>
<td>Reaching New Horizons</td>
<td>313</td>
<td>0</td>
<td>62</td>
<td>443</td>
<td>818</td>
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<tr>
<td>2011</td>
<td>Salt Lake City, UT</td>
<td>Angelman Syndrome at the Crossroads</td>
<td>227</td>
<td>85</td>
<td>50</td>
<td>134</td>
<td>496</td>
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<tr>
<td>2013</td>
<td>Orlando, FL</td>
<td>Championing Progress</td>
<td>187</td>
<td>89</td>
<td>61</td>
<td>183</td>
<td>520</td>
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<tr>
<td>2015</td>
<td>Schaumburg, IL</td>
<td>Hope Inspired</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Average Attendance</td>
<td>269</td>
<td>91</td>
<td>28</td>
<td>130</td>
<td></td>
<td>528</td>
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</table>

Average attendance: 528 attendees (total); average 269 session attendees
Total Sessions: 48 – 60 sessions
- 2 or more pre-conference workshops (1/2 or full-day workshops)
- 3 general (keynote) sessions
- Remaining sessions concurrent session (4 x )

Other General Conference Events:
- 1 Reception
- 2 Breakfasts
- 2 Breaks
- 1 Adult Mixer
- 1 Award and Recognition Event
Scientific Meeting
- 14 – 21 Scientific Symposium Sessions
- 2 breakfasts
- 2 lunches
- 1 reception
- 4 breaks

3. Scope of Work

All meetings are held in large hotels with meeting space that can accommodate the group’s program, as well as meet our participant lodging needs. Our group does not hold meetings in convention centers. Meeting attendance is comprised of AS families (people with AS, their siblings and parent(s)), care providers, educational professionals, health care professionals, clinicians and scientists. Registration fees are not charged for the biennial (general family) conference but are charged for the scientific symposium. All attendees must register to participate in the biennial meeting. Most meeting costs are covered by the ASF and a percentage by meeting sponsorships, with only a minimal cost recovery from symposium registration fees. Managing meeting costs is a significant factor, as well as improving the top line of the budget and improving the overall conference attendee experience.

The meeting planner will serve as the 2017 Biennial Conference meeting planner. The meeting planner is responsible for all conference planning functions for this event, serving as liaison between the ASF and the hotel. The meeting planner will report to, and all final decisions must be made in consultation with, the ASF’s Executive Director or designee. The meeting planner, in partnership with the ASF Executive Director or designee and the Conference Planning Committee, ensures all duties associated with scheduling, coordinating, program content, events and sponsoring the biennial conference are met. ASF will provide staff as resources for budgeting, event promotion, special recognition events, and onsite registration.

The selected vendor will be required to fulfill the meeting services deliverables outlined below, within a pre-determined and established meeting budget for the 2017 ASF Biennial Conference.

Deliverables
The exact nature of the work consists of:
- Pre-conference planning, logistics, coordination and project management support
- Onsite coordination and logistics management
- Final conference report

Pre-Conference Planning, Logistics, Coordination and Project Management Support
- Create a project schedule with deadlines and key deliverables for the event. Project schedule must provide a detailed, chronological timeline encompassing all necessary activities and deadlines
- Be available to participate in monthly and bi-weekly planning meetings with ASF Staff and/or Conference Planning Committee
- Work with ASF staff and Conference Planning Committee (via conference call and in person) as necessary to meet deadlines
• Work with ASF staff and Conference Planning Committee to create daily schedule of general and concurrent sessions
• Create all on-site signage for the registration area, session rooms, and throughout the property during meeting

**Hotel Liaison for the Scientific Symposium and General Family Conference**
• Serve as liaison between hotel staff, ASF and the Conference Planning Committee
• Schedule and attend pre-conference meetings with hotel staff and ASF Executive Director, as requested. There will be at least one meeting and walk-through at the beginning of the planning process
• Coordinate all A/V equipment needs
• Manage event space logistics, staging and room set-ups
• Track hotel room pickup to ensure contractual obligations are met; report back to ASF Executive Director on weekly basis with complete pickup and past-years’ comparatives
• Acquire materials and manage catering, A/V, facility management, and other relevant and required services
• Handle all BEO obligations and deadlines

**Speaker Liaison for Scientific Symposium and General Family Conference**
• Work with ASF staff, ASF Scientific Advisory Committee and Conference Planning Committee to identify and confirm speakers for the symposium and conference
• Manage the Call for Presentations process
• Manage speaker confirmations
• Coordinate with ASF Staff member who will gather all speaker materials such as bios, presentations, handouts and session descriptions
• Coordinate with ASF Staff member to ensure speakers register for the conference (if attending sessions)
• Coordinate speaker A/V and/or set-up needs ahead of time
• Work with ASF Executive Director to determine speakers who may receive honoraria
• Create and deliver process for attendees to provide evaluation on speakers and sessions in real-time (onsite) both electronically and hard copy
• Communicate with speakers on their requirements, deadlines, deliverables, and ensure adequate preparation
• Convey logistical information and guidance and all necessary event details to speakers and key staff at registration area

**Children’s Activities Program**
• Work with ASF staff and Conference Planning Committee to determine 2-day children’s activities program during General Family Conference
• Program will include appropriate activities for individuals with Angelman syndrome of all ages and their siblings, ages 2 – 18 years old
Sponsor/Exhibitor Liaison
- Solicit sponsors and exhibitors by working with the ASF and Conference Planning Committee to expand the current contact list
- Manage sponsor and exhibitor contracts
- Contact and confirm sponsors and exhibitors for the conference
- Identify set-up requirements for exhibits
- Coordinate sponsor and exhibitor A/V and/or setup needs ahead of time
- Communicate with sponsors and exhibitors on their requirements, deadlines, deliverables, and ensure adequate preparation
- Convey logistical information and guidance and all necessary event details to sponsors and exhibitors and key staff at registration area

Public Relations/Marketing/Design
- Coordinate with the ASF PR and Creative team the professional design and production of all conference materials listed below. Estimated production costs require a minimum of three (3) competitive bids and must stay within conference budget
- Coordinate with the ASF regarding the design, printing and distribution—both mailing and electronic—of conference promotional materials
- Provide copies in advance of publication deadlines for editing and correction
- Print, electronic and online conference materials the Meeting Planner will be responsible for, and must meet the approved 2017 conference budget, include:
  - Save the Date
  - Registration Brochure
  - Sponsor & Exhibitor Packet
  - Call for Speakers and Abstracts (Scientific Symposium)
  - Call for Speakers (General Family Conference)
  - Conference Agenda
  - Conference Program Book
  - Event Signage
  - Conference & Session Evaluations (on site, electronic, real-time)

Registration Administration and Management
Manage registration process, including:
- Work with webmaster and ASF staff member to set up online registration
- Provide webmaster with all necessary information about schedule, logistics, etc.
- Work with ASF Staff member to submit monthly, biweekly and weekly reports to ASF Staff, Webmaster and Conference Planning Committee regarding registrations, sponsorships and exhibitors
- Ensure collection of any additional funds due after the symposium and conference, with a list of refunds due to registrants within two (2) weeks of the end of the conference.
Onsite Coordination & Logistics Management

**General**
- Provide on-site coordination for the duration of the conference to manage or support onsite logistics (exhibit space, meeting facilities, session staging, A/V needs, catering and signage) ensuring a smooth event.
- Meeting planner will be expected to provide the appropriate amount of staff to manage onsite coordination and logistics
- Manage communications involved with the event including PR/marketing/sales/customer service with staff and speakers
- Ensure cleanup and wrap up of all onsite details after the event

**Registration**
- Set up and maintain neat, orderly, professional registration area and signage
- Fully train staff and volunteers to manage all aspects of onsite registration area, including distribution of speaker, sponsor, exhibitor and attendee materials and to fully train staff and volunteers regarding all onsite registration issues during registration hours
- Plan and allow for onsite payments (real time) ensuring necessary programs and materials available for staff and volunteers to accomplish this
- Fully train designated staff and volunteers to process onsite payments and registrations

**Speakers/Sponsors/Exhibitors**
- Handle speaker, sponsor and exhibitor needs throughout the event
- Ensure all speaker, sponsor and exhibitor need requests, not related to setup and A/V, are handled appropriately by the Meeting Planner
- Manage and direct speakers, sponsors and exhibitors onsite

**Banquet Event Orders (BEOs)**
- Manage all meals for the duration of the symposium and general conference
- Ensure consistency of BEOs throughout the event
- Monitor room and food set up with each event
- Work with hotel staff regarding any additions or changes

**A/V Needs**
- Serve as point person between ASF, hotel staff, and onsite A/V technicians to provide immediate resolution of problems with A/V or other technical issues
- Work with A/V contractor/hotel to meet all A/V requirements
- Assist speakers with presentation set up, as needed
- Ensure security of equipment throughout event, as needed

**Workshop Sessions and Evaluations**
- Ensure workshops run smoothly
- Count and record each session attendance figures
• Provide for on-site electronic technology options for session evaluations before and after each session
• Distribute and collect hard copy session evaluations before and after each session
• Distribute and collect conference evaluations on last day of event

Final Report to ASF
Must include (but not limited to):
• Final room block pick-up, including comps
• Complete list of speakers and registrants, including pertinent contact information
• List of all registrants in attendance
• # Scholarships awarded and total $$ amount awarded
• Attendance at each event (session counts)
• Breakout of registrations: full, one-day, children’s, speakers, scientific and other attendees (meals only, etc.)
• Cost and attendance for each meal function
• Income generated by sponsorships and exhibitors
• Aggregation of analysis of session and conference evaluations (all raw data used to support analysis will also be submitted to ASF)
• Challenges faced in carrying out the scope of work
• Professional recommendations for improving the event

<table>
<thead>
<tr>
<th>PROJECT TIMELINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Dates</td>
</tr>
<tr>
<td>ASF Issues RFP</td>
</tr>
<tr>
<td>Deadline for Questions Related to RFP</td>
</tr>
<tr>
<td>Proposals Due to ASF From Potential Vendor(s)</td>
</tr>
<tr>
<td>Notification of Award</td>
</tr>
<tr>
<td>Start Date for Contract</td>
</tr>
</tbody>
</table>

4. Proposal Submission

RFP Submission Guidelines
Questions regarding RFP must be submitted in writing to: 2017Meeting@angelman.org. Proposals will be accepted until 4:00 p.m. Central Time, January 11, 2016. Vendors will submit their proposals via email, in .pdf format.

The Angelman Syndrome Foundation may award a contract resulting from this solicitation to the respondent whose offer conforms to this RFP and will be in the best interests of the Angelman Syndrome Foundation and its meeting participants and attendees. The Angelman Syndrome Foundation may reject any or all offers if doing so is in the best interest of the organization.
This Request for Proposals (RFP) shall not be construed as a guarantee of contract, nor does it commit the Angelman Syndrome Foundation to pay any costs associated with submissions or any other costs incurred prior to the execution of a formal agreement.

**RFP Submission Requirements**
- Cover Letter
- Applicant Resume / CV
- Table of Contents
- Work plan describing the general approach or project development strategy for meeting deliverables
- A project schedule and work breakdown structure, which identifies timelines, key milestones, project phases or other project plan information
- Activity plans with detailed task list and timeline addressing each deliverable
- Explanation of how the RFP requirements will be achieved, including delegation of responsibility to team (staff and volunteers) members, follow-up plan, and support provided to ASF
- Meeting Planner budget that provides a breakdown of costs related to management of the event as outlined in the scope of working, including labor, equipment, materials, office expense, mileage and travel cost for the meeting planner. *Include hourly billing rate and estimated number of hours for each item.*
- Brief description of previous work in related areas
- Statement of qualifications.
  - Include a statement regarding use of technology for enhancement of participant experiences
  - Include a statement highlighting what specifically sets apart meetings under your direction and management from others
- Names and brief summary of experience of key personnel (if applicable)
- Three references, including contact person, phone number, project description and budget
- Sample of previous work which could include a conference final report, conference promotional material, etc.

**Budgeted Amount**
The total amount awarded shall not exceed $25,000.

**Selection Criteria**
All proposals will be evaluated systematically, based on the following key criterion:

**Work Plan: 30 points**
- Comprehensive understanding of the project
- Proposed methodology is complete, clear, and well-explained, clearly indicating what cost estimates include
- Clear description of strategy, plan, task lists, outcomes and timelines that demonstrates a full understanding of the scope of the project and is comprehensive, logical and sequential
Demonstrates how the conference planner will communicate with and collaborate with ASF staff, Conference Committee and volunteers

**Demonstrated Capacity to Do the Work: 30 points**
Proposal provides evidence of specific qualities, including:

- Thorough understanding of conference and hospitality industry practices
- Relevant knowledge, skills and experience to perform this task successfully
- Experience successfully planning large-scale meetings and events remotely
- Ability to take the lead in generating solutions
- Experience and capability of principal applicant and key personnel (if applicable)
- Demonstrated capacity to negotiate business agreements and represent ASF’s best interests

**Budget: 40 points**

- The proposal budget addresses the deliverables outlined in the work plan
- Costs presented for tasks to be performed are reasonable and feasible

**Submissions**
All proposals shall be submitted to:
The Angelman Syndrome Foundation
2017Meeting@angelman.org
Interested vendors should submit their proposals no later than 4:00 p.m. Central Time on January 11, 2016.