Request for Proposal for an Event Coordinator

2023 Conference of the Canadian Evaluation Society and the Société québécoise d'évaluation de programme to be held in June 2023

Proposals are due to the CES by 5pm (Eastern time) on July 15, 2022. Bidders are asked to send an email indicating their **intent to submit a proposal by 5pm (Eastern time) on June 24, 2022**. See section 5.1 for instructions. Questions on this RFP are welcome before June 30, 2022; see section 8 for further detail.

1. Background

The Société québécoise d'évaluation de programme affiliated to the Canadian Evaluation Society (CES) will be hosting the 43rd annual conference of the CES at the Hilton Hotel in Quebec City from June 19 to 22, 2023. This Request for proposal (RFP) is for the selection of an event coordinator to support the organizing committee of the 2023 conference. The conference will be held in a hybrid mode which means in-person mode, in an online mode concomitant to the in-person mode and in an international online mode.

The annual conference is a major event of the CES. It is an opportunity to advance evaluation by:

- promoting the professionalization of evaluation practice;
- providing valuable networking opportunities among colleagues in the evaluation community in Canada and internationally;
- offering workshops and sessions that foster a learning and sharing environment;
- positioning the CES as the leading national organisation representing the evaluation community;
- contributing to the financial health of the CES and the SQEP.

Each CES conference has its own personality that is reflective of the location and of the time period. The 2023 conference will explore the theme of "**Evaluation in a Changing World**". This theme will be approached using four sub-themes which are: In the face of transformations, how should evaluation evolve? What is the contribution of Evaluation in dealing with the complexity of change? How to respond to change by taking advantage of the plurality of evaluation practices? How to address the challenges facing professionalization?

More importantly for the event coordinator assignment, the conference organisation is founded on core values: **bilingualism**, **inclusivity, diversity, equity, accessibility**, and **environmental sustainability**. Every decision made toward the organisation of the 2023 conference will be filtered through these core values.

As well, the event manager will collaborate with the Committee for inclusion, diversity, equity, accessibility, and environmental sustainability (IDEAS) whose mandate consists of enabling the conference to be more responsible, responsive, and respectful in its approaches and commitments towards the guiding principles by:

- Understanding the current membership of CES and actively looking to engage other CES members who are underrepresented.
- Leading data collection and analysis in a consistent basis on the demographic and diversity of CES and tailor programming and services to the membership.
- Reviewing membership opportunities and information to ensure it is accessible and inclusive.
- Identifying and proposing solutions to barriers that exist for members and prospective members.
- Helping CES foster a safe and welcoming environment for current and potential members and Credentialed Evaluators (CEs) that reflects a wide range of diversity.
- Giving attention to being inclusive and engaging rather than bureaucratic and limiting.
- Innovating to do things differently. Consider those who may have been excluded in the past and address barriers to membership and participation in CES.

A typical CES conference help the in-person mode attracts some 400 delegates. The 2023 conference will be hybrid meaning in=person and online. For the in-person mode the conference expects to attract national and international delegates. Via its online mode the conference aims at attracting delegates from more than fisty countries. CES foresees some 300 online attendees.

2. Project Overview

The CES-NCC is seeking conference planning and coordination support. The successful applicant will be responsible for supporting a cadre of volunteers and paid staff involved in the organisation of the conference. The structure of the organizing committees has been defined and terms of reference for each committee have been devised. While several members of the committee structure have experience with CES conference organisation, advice and implementation effort from an event coordinator will support the professional character of the event and will ensure the delivery of many tasks that are beyond what can be expected of a volunteer. It is also expected that the event coordinator will promote best practices and will bring innovative ideas to the conference organisation.

The successful event coordinator will report to the co-chairs of the conference and will get involved in the work of several committees. The coordination of the conference will also take place in the context of

the agreement established between the CES-NCC and the CES which is fleshed out in the *conference manual*.

3. Budget and Payment Schedule

The budget assigned to event coordination is $30,000, excluding applicable taxes. Bidders are invited to indicate what services they can offer within this envelope and what the cost of additional services would be. The following payment schedule is proposed:

- 20% upon contract signature;
- 20% milestone as of January 31, 2023;
- 30% milestone as of April 30, 2023;
- 30% once all event accounting is completed.

4. Tasks

A preliminary schedule has been devised for the conference organisation, based on previous conferences.

The following is a list of tasks that need to be conducted, along with the level of responsibility for the event coordinator and the organizing committees involved. The event coordinator involvement is qualified using the following scale, in decreasing order of accountability: primary, shared, support, no responsibility (cell left empty). Proposals may identify missing tasks or additional delegations judged to be more effective or efficient.

TASK	EVENT COORDINATOR
1. Overall communication and coordination	
1.1 Coordinate all committees and working groups	Support
1.2 Produce detailed work plan and critical path, key decision points	Primary
1.3 Assign experienced staff for all scheduled CES Conference Committee meetings	Shared
1.4 Monitor timelines and the critical path	Shared
1.5 Take part in all Management Committee meetings for optimal coordination	Primary
1.6 Produce monthly reports (flagging feedback or concerns as issues arise)	Primary
2. Budget monitoring	
2.2 Monitor venue and hotel guarantees to avoid penalties	Primary
2.2 Monitor budget and expenses (Done by CES)	
3. Registration	
3.1 Promote and ensure a control on registration (Done by CES)	
3.2 Manage online registration and payments (Done by CES)	
3.3 Manage on site registration and payments (Done by CES)	
4. Conference program	
4.1 Develop conference program and agenda	Support
4.2 Ensure that logistical constraints are considered	Shared
4.3 Develop workshop program	Support
4.4 Develop breakfast program	Support
4.5 Manage the Calls for proposals (Done by CES)	
4.6 Contact presenters to provide instructions, information concerning the calendar of events, logistical information (A/V equipment, special needs); ensure that bios and presentation materials are submitted (Done by CES)	
4.7 Identify session chairs, communicate with them (Done by CES)	
4.8 Identify keynotes speakers and sign contracts (Done by CES)	
4.9 Ensure airport pick-up and local greeting for keynotes	Primary
4.10 Organize CES+CESEF national events (Annual General Meeting, Awards Luncheon, Case Competition)	Shared
4.11 For plenaries, coordinate translation within performance standards	Primary
4.12 Prepare the printed version of the conference program (Done by CES)	
4.13 Prepare the app-based version of the conference program (Done by CES)	

4.14 Ensure interactivity during the conference	Support
5. Delegate kit (sustainability concerns will impact this practice)	
5.1 Arrange for the conference program to be printed (maybe an electronic version instead of a hard copy)	Primary
5.2 Source the conference bags	Primary
5.3 Coordinate the creation of the content of the conference bags	Primary
5.4 Prepare/assemble the conference bags	Primary
5.5 Print personalized delegate badges before the event	Primary
5.6 Print personalized double-sided delegate badges at the registration desk (plastic sleeves will be collected for reuse)	Shared
6. Venue	
6.1 Perform thorough site visit, recommend layout options per programme	Shared
6.2 Liaise with the venue and manage all function space: room requirements and allocation of space per the final program, logistics and audio-visual	Primary
6.3 Monitor venue budget, ensure proper coding/classification of expenses; flag concerns to co-chairs and treasurer	Primary
6.4 Provide secretariat function on site during the event (printing, logistics, reception)	Primary
6.5 Ensure meeting rooms and catering for CES meetings (organized and billed separately for catering, room set-up)	Primary
6.6 Develop menus and set up arrangements for all food and beverage functions within budget and sustainability expectations (e.g., default to vegetarian, avoid plastic, minimal waste, redirect to foodbanks/compost)	Shared
6.7 Ensure food allergies and exceptions are handled	Primary
7. Volunteers	
7.1 Define volunteer tasks; clarify volunteer benefits (Done by CES)	
7.2 Recruit, organize, assign, supervise volunteers	Support
7.3 Structure and run the volunteer recognition program (Done by CES)	
8. Audio-visual	
8.1 Obtain from presenters their Audio visual needs (Done by CES)	
8.2 Define A/V requirements and obtain quotes	Primary
8.3 Define IT requirements and obtain quotes	Primary
8.4 Liaise with presenters to ensure all audiovisual (and other) requirements are accommodated	
8.5 Conduct on site testing prior to events and on day-of; contact the audiovisual supplier's on-site technician immediately in response to technical difficulties	Primary

8.6 Monitor expense details and budget closely	Support
8.7 Coordination of signage design, printing, set-up	Primary
9. Social programme	
9.1 Organisation of networking and social activities on site (Welcome Reception, coordination re CESEF Silent Auction, orientation sessions, hospitality suites)	Shared
9.2 Organisation of networking and social activities	Shared
10. Website and marketing	
10.1 Develop the marketing program according to the theme	Support
10.2 Develop a conference logo (Done by CES)	
10.3 Exploit the use of the logo	Primary
10.4 Setup a dedicated website based on the existing template, using CES systems	Shared
10.5 Ensure all digital and non-digital materials are reviewed, translated, and published	Support
10.6 Coordinate marketing messages	Support
10.7 Manage the social media campaign	Support
10.8 Work with the local tourism office and others to promote the Conference	Primary
10.9 Promote and monitor registration (Done by CES)	
11. Exhibits and sponsorships	
11.1 Identify potential local, national, and international exhibitors and/or sponsors; approach potentials; collect proposals; negotiate for services	
11.2 Liaise with and/or coordinate sponsors, exhibitors and supplier(s) including executing agreements; ensure publishing specifications for ads are clear; and arrange setup requirements, furniture and a/v requirements; issue deadline and delivery instructions for any swag/delegate kit items approved	Support
11.3 Develop program for exhibitor layouts; instructions for exhibitors/displays relative to greening and sustainability as well as move in/out; ensure proper shipping and delivery instructions/dates are known	Primary
11.4 Coordinate setup and takedown prior to and after exhibit hall	Primary
11.5 Ensure accurate invoicing occurs (Done by CES)	
12. International networks	
12.1 Define an international promotion strategy (Done by CES)	
12.2 Develops and implements an international sponsorship strategy	
12.3 Support international delegates in the formalities of their attendance	Support
12.4 Provide local guidance and support during the conference	Support
12.5 Consider the need for a Buddy Program; designs and implements such a program as required (Done by CES)	

12.6 Foresee measures to propose international delegates ways to track and lower carbon emission for their travel to the conference site	Support
13. Conference web broadcast	
13.1 Plan the IT support requirements to broadcast the conference internationally	Primary
13.2 Coordinate the logistics of the online presentations	Primary
13.3 Ensure easy access by participants to online presentations	Primary
14. Post-event analysis	
14.1 Gather delegate feedback	Support
14.2 Gather suggestions for improvement	Support
14.3 Gather key metrics (ongoing) (Done by CES)	
14.4 Produce an evaluation report	Support

5. Proposals

5.1. Submission

All communications regarding this RFP shall be to directed to Anna Gueye gestevalcanada@gmail.com et Jean Serge Quesnel jean.s.quesnel@sympatico.ca .
Bidders are asked to send an email indicating their intent to submit a proposal by **5pm (Eastern time) on June 24, 2022.**

Proposals should not exceed 10 pages, single-spaced with 1-inch margins and 12-point font (approximately 3,000 words, excluding any references and appendices). Proposals should be sent electronically only (no paper), **by 5pm (Eastern time) on June 30, 2022.** Acceptable formats are .pdf, .doc, .docx, .ppt, .pptx.

5.2. Eligibility of Bidders

This RFP is open to all bidders except for a company in which a Board member or Board member's spouse, child, or grandchild is an employee or has an ownership interest. In this case, an employee of the company is eligible to respond to contracting opportunities if the Board member is not involved in any phase of the contracting process, does not use his/her position to influence a decision in the awarding of the contract, and declares the conflict of interest to the Board prior to the submission of a proposal.

5.3. Proposal Content and Evaluation Criteria

Proposals will be assessed against the following criteria:

1. experience and expertise in quasi-academic conference planning and organisation;
2. clarity and appropriateness of the proposed involvement;
3. ability to embody the five core values of the conference;
4. ability to ensure event coordination with the city of Quebec;
5. experience dealing with a Hilton Hotel or similar entities;
6. experience in integrating environmental sustainability in the events planning, with reference to a certification pertaining to sustainability or other official capacity in ecologisation;
7. experience in integrating equity, diversity, and inclusiveness in the planning of events as well as accessibility of various delegates and participants in a conference;
8. relevance of innovations proposed;
9. price (compensation rate or range associated with tasks; cost breakdowns should also include the applicant's policy and costs associated with unforeseen/out of scope tasks).

It is recommended that capacity, experience, and expertise be demonstrated through:

- qualifications, degrees, or accreditations;
- a list of relevant similar assignments and results obtained;
- a detailed description of one conference you coordinated that was comparable in type and scope;
- an analysis of challenges you foresee and mitigating strategies proposed;
- a detailed breakdown of timelines and tasks;
- mastery of French and English languages;
- a minimum of two written references from past clients and a list of three additional references that can speak to your abilities and accomplishments.

6. Evaluation Process and Timeline

Proposals will be reviewed by a group formed of the two conference co-chairs and one senior advisor and the two co-chairs of Committee for inclusion, diversity, equity, accessibility, and environmental sustainability (IDEAS).
Proposals will be assessed within two weeks of bid closing time. Shortlisted candidates will be interviewed by teleconference. Depending on availability for these calls, a final decision is expected within four weeks of bid closing time.

7. General Conditions

Right to Amend RFP. The CES reserves the right to amend or supplement the RFP, giving equal information and cooperation by way of issued addendum to all potential bidders who indicated an intent to submit a proposal (see section 5.1).

Bidder-Incurred Costs. All costs incurred in the preparation and presentation of proposals in any way whatsoever shall by wholly absorbed by the bidder(s).

Indemnity. The bidder(s) will indemnify and save harmless the CES from and against all claims, demands, losses, damages, costs, and expenses made against or incurred, suffered, sustained, done, or omitted by the CES at any time before or following termination of the agreement.

Acceptance of Proposals. The CES is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed based on the criteria specified in section 5.3.

Maximum Funding. The funding for this project is limited to the amount stated in section 3, in Canadian funds, exclusive of applicable taxes but inclusive of all expenses. Bids over this amount will be considered non-compliant. The payment schedule is shown in section 3 as well.

Ownership. All materials created through this contract shall be the property of the CES and shall not be published, released, or used for training others without the written consent of the CES.

Termination of Contract. A contract awarded based on a response to this RFP may be terminated by either party with a 30-day notice, with outstanding payments to be negotiated between the contractor and the CES.

Insurance. The contractor shall maintain Comprehensive General Liability Insurance throughout the term of the Agreement in the amount of not less than $2,000,000 and Errors and Omissions Insurance throughout the term of the Agreement in the amount of not less than $1,000,000.

8. Questions and Inquiries

Prospective bidders may ask questions regarding this RFP by writing the individuals identified in section 5.1 before June 30, 2022. In the interest of equality of access to information, responses to questions shared with all potential bidders who indicated an intent to submit a proposal (see section 5.1).