

**REQUEST FOR PROPOSALS:  
CERTIFIED MEETING PLANNER**

**A. Introduction**

The Children’s Oncology Group (COG), a National Cancer Institute supported clinical trials group, is the world’s largest organization devoted exclusively to childhood and adolescent cancer research. The COG unites more than 9,000 experts in childhood cancer at more than 200 leading children’s hospitals, universities, and cancer centers across North America, Australia, New Zealand, and Europe in the fight against childhood cancer. Through this Request for Proposals (RFP), COG seeks bidders to provide the services and specifications as outlined below.

**B. Proposal Format**

In order for PHI to conduct the most efficient proposal evaluation, bidders are required to include the following information in their proposals as described below:

- 1. Corporate Overview** – A description of the bidder and a list of references
- 2. Price Proposal** – A description of the bidder’s price schedule (monthly/yearly/discounts)
- 3. Contact Information** – A statement of main point of contact for negotiations

**C. Submission of Proposals & Closing Time**

Please submit proposals to: **Brooke Martinez**  
Email: [bmartinez@childrensoncologygroup.org](mailto:bmartinez@childrensoncologygroup.org)  
Proposals are due by: **Wednesday, December 9<sup>th</sup>, 2020**  
4:00pm – Pacific Standard Time

**D. Solicitation Guidelines**

**1. Agreement**

COG, through its fiscal sponsor, Public Health Institute (PHI) intends to issue an agreement to the successful bidder from this procurement process. It is PHI’s intention to issue a multiple year agreement, for the period January 1, 2021 through December 31, 2024. The agreement will outline approved billing rates for each type of service provided, including meeting preparation and on-site rate and the terms and conditions applicable to the work performed.

**2. Discretion**

PHI may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process. PHI may also, at its sole discretion, choose to issue as many or as few agreements or alter the agreement period as deemed necessary to meet PHI’s business needs.

**3. Offers/Quotations**

Prices must be inclusive of all costs, including taxes and fees, in US Dollars. Please include an estimated yearly rate based on number of hours anticipated based on the scope of work as well as a total estimated cost for the proposed contract period. Quotes prices should remain valid for thirty (30) calendar days from proposal submission.

#### 4. Proposal Costs

There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.

#### 5. Proposal Evaluation

PHI will select the bidders whose offer will provide the most favorable mix of corporate credentials and cost, thereby ensuring overall best value procurement.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI:

- Technical Capacities
- Cost Reasonableness
- Cost Competitiveness
- Diversity and Inclusion

### E. Required Services / Specifications

#### 1. Service Type(s): Certified Meeting Planner

2. **Specification(s):** The Children's Oncology Group is seeking an experienced certified meeting planner to provide meeting planning services for COG's annual meetings.

3. **Statement of Work:** All meetings are held in large hotels with meeting space that can accommodate. Group does not hold meetings in convention centers. Most meeting costs are covered with federal grant funds with minimal cost recovery from registration fees. Managing meeting costs is a significant factor.

#### Typical Annual Meetings

1. One 5-day meeting in the Spring
  - a) Approx. 900 attendees
  - b) Approx. 100 sessions
  - c) Approx. 4-5 social events
2. One 5-day meeting in the Fall
  - a) Approx. 1,800 attendees
  - b) Approx. 170 sessions
  - c) Approx. 6-7 social events
3. 1-3 ad hoc meetings per year
  - a) 50 to 300 attendees each
  - b) Approx. 10 sessions
  - c) Approx. 1 to 2 social events

Meeting Services Required

1. Develop and maintain budgets for meetings and events as needed
  2. Develop timelines and task lists for meetings and events as needed
  3. Site research, visits and recommendation for meeting venues
  4. Negotiate hotel and vendor contracts
  5. Assist in development of program agenda
  6. Coordinate with internal staff on agenda and program changes
  7. Liaison with speakers regarding program needs and travel as required
  8. Develop and coordinate registration process (COG uses in-house web-based registration application)
  9. Serve as main contact to relay and manage all logistics through hotel and vendors
  10. Coordinate food and beverage, set ups, a/v, theming and entertainment
  11. Creative development of on-site events and productions. Seek approvals as needed.
  12. Develop detail guide for entire conference and send for approval before distributing
  13. Maintain rooming lists, function space set up, a/v requirements and vendor orders
  14. Secure and manage group airline contracts and travel activity (with travel agent if used)
  15. Secure discounts and coordinate ground transportation from airport
  16. Develop communications/forms to coordinate with employees regarding their attendance
  17. Develop communications and forms to coordinate with sponsors and exhibitors
  18. Communicate with employees and sponsors for all meeting and travel related needs
  19. Coordinate and develop communication materials for registration and on-site handouts
  20. Liaison with Trade Show Company regarding exhibitor needs and requirements
  21. Secure special arrangements for and serve as point of contact for VIPs
  22. Coordinate promotional item and meeting supply orders as necessary
  23. Oversight/Management of all on-site meeting details, registration and staffing
  24. Pre and post conference meetings with internal staff and outside suppliers
  25. Review all meeting related invoices and resolving all discrepancies
  26. Post conference summary reports and budget reconciliation
  27. Other services as required to meet client's specific meeting planning needs
- 4. Location(s):** Remote for meeting preparations and virtual meetings, on-site at specified locations for in-person meetings.
- 5. Other Requirement(s):** N/A

**6. Diversity and Inclusion Initiative**

PHI is dedicated to promoting diversity in its procurement of goods and services. Pursuant to PHI's commitment to diversity, PHI encourages vendors that are certified as any of the following businesses:

- WOSB: Women-Owned Small Business
- SDVO: Service-Disabled Veteran-Owned Business
- HUBZone: Historically Underutilized Business Zone
- SDB: Small Disadvantaged Business
- 8(a)BD: African American, Asian Pacific American, Hispanic American, Native American, Subcontinent Asian American