



**Office of the Medical Director
Request for Proposal
Event Planning and Management Services for Fifth Annual Trauma-Informed Care Summit
(MHA-18-MEDDIR-EventPlanTIC-034)**

PROPOSAL DUE DATE: MONDAY NOVEMBER 6, 2017 AT 5:00 P.M.

Background and Purpose

The Ohio Departments of Mental Health and Addiction Services (OhioMHAS) and Developmental Disabilities (DODD) launched a statewide Trauma-Informed Care Initiative (TIC) in 2014. A goal of this Initiative is to expand opportunities for Ohioans to receive trauma-informed interventions by enhancing efforts for practitioners, facilities and agencies to become competent in trauma informed practices. TIC is an approach that explicitly acknowledges the role trauma plays in people's lives.

OhioMHAS and DODD will conduct the Fifth Annual TIC Summit, a two-day TIC Educational Event on May 18 & 19, 2018 to:

- Promote an understanding of secondary/vicarious trauma.
- Provide information about trauma informed interventions, clinical best practices and programs in Ohio;
- Develop a shared understanding of the concept of trauma and a trauma-informed approach; and,
- Promote an understanding of the principles of trauma-informed care.

Request for Proposal: Event Planning and Management Services

This RFP seeks proposals to provide event planning and management services for:

- A two-day Trauma-Informed Care Summit on May 18 and 19, 2018; with anticipated attendance of up to 400 people.
- Event to be held at the Residence Inn Marriott, Marriott Columbus University Area, 3100 Olentangy River Road, Columbus, Ohio 43215

Services to Include

1. Secure and administer contract with event venue for the two-day Summit
 - a. Large meeting space (main conference room) for up to 400 attendees
 - b. 8-9 break out rooms with capacity for 60

- c. Continental breakfast, lunch and afternoon break; awardee shall seek to divert lunch dessert to use as afternoon break snack
 - d. Coordinate audio-visual equipment with conference facility (laptops, LCD projectors, microphones, etc.) for main conference room and break out rooms (if needed)
 - e. Negotiate room block for conference attendees lodging
- 2. Designate a project manager responsible for monitoring and reporting on event planning activities. The project manager will regularly attend all meetings of the OhioMHAS/DODD Planning Committee.
- 3. Coordinate with OhioMHAS regarding continuing education (CE) credit and application completion. This will include, but is not limited to:
 - a. An initial planning meeting with OhioMHAS Training & Development staff to discuss Continuing Education process and expectations
 - b. Scheduling other meetings as needed for CE follow-up during the process
 - c. Completing all applicable applications and processes to obtain CE credit for the conference
 - d. Submitting the CE application and all supporting documents at least four weeks in advance of the conference date, or the date that the registration site “goes live”, whichever comes first
 - e. Printing all required conference paperwork provided by OhioMHAS once approved, including carbon CE Certificate/Attendance Verification forms
 - f. Ensuring all required CE paperwork is available the day of the conference
 - g. Working with OhioMHAS Training & Development staff to accommodate recording of conference sessions to create enduring training material, as needed
 - h. Submitting post-program paperwork electronically to OhioMHAS Training & Development staff within ten days of conference
 - i. Accommodating one or more OhioMHAS Training & Development staff attending conference to audit proper execution of CE processes.
- 4. Design and manage participant registration using specialized software, and accommodating break out session quotas; collect and monitor information regarding any special need(s) requests (e.g., physical accommodations, interpretation services and dietary); data base management.
- 5. Follow through on any special need(s) requests, e.g. arrange for accommodation of special needs requests such as dietary restrictions, interpretation services and physical accommodations.
- 6. Provide fiscal tracking and managing of all registration fees (collect, record and track registration fees; distribute receipts); accept cash, check and credit cards as methods of payment; and process invoices for payment.
- 7. Provide confirmation correspondence to all participants.
- 8. Correspond with speakers as needed to assist in meeting needs including AV equipment, hotel accommodations, if appropriate, etc.
- 9. Develop, coordinate and supply signage for Summit break-out sessions.
- 10. Coordinate assembly and copying of event materials.
- 11. Provide registrants, workshop presenters and guests with printed name badges in holders, manage and maintain sign-in rosters, collect and distribute event materials.
- 12. Provide on-site manager at conference facility for duration of Summit to manage: meeting room arrangements, including availability and operability of audio-visual packages/equipment; meal

- logistics; afternoon breaks; and to direct operations.
13. Provide adequate on-site staffing for registration, management of Summit logistics, and, end of day check-out, evaluation turn-in and distribution of CEU certificates.
 14. Compile a final electronic and hard copy report of all participants in a format mutually agreed upon between the awardee and OhioMHAS.
 15. Review/assess evaluations and provide OhioMHAS and DODD with a summary report of the evaluations.
 16. Distribute post-conference correspondence to speakers.
 17. Distribute invoice or follow up correspondence against purchase orders for non-payment and provide receipts.
 18. Invoice and follow up on outstanding fees.

Applicant Qualifications

1. Applicant must hold permanent 501(c)(3) non-profit status or must be a general or special purpose government entity. Awardee must execute the OhioMHAS Agreement and Assurances Attachment 3, without modification.
2. Documented experience in meeting/event pre-planning, on-site and post-event management services.
3. Knowledge of Ohio's Mental Health, Addiction, and Developmental Disabilities systems and their partners.

Proposal Documents; Questions

1. The RFP, accompanying documents, updates, and all questions and answers will be posted on the OhioMHAS website <http://mha.ohio.gov/Default.aspx?tabid=725>. Interested parties are required to monitor this site for any updates to the RFP.
2. All **questions** must be submitted electronically no later than Wednesday November 1, 2017 by 5:00 p.m. pm to TRAUMA-SUMMITRFP@mha.ohio.gov.
3. No questions will be answered after the deadline. You may NOT contact any OhioMHAS staff member directly with questions regarding this RFP. Contacting staff directly with questions may result in disqualification of a proposal.
4. Responses to all questions will be posted to the OhioMHAS website at <http://mha.ohio.gov/Default.aspx?tabid=725> and will be updated frequently.

Proposal Content

Proposal page limit is five, single-spaced pages in 12 point Times New Roman font. This page limit does NOT include the budget table or budget narrative (Attachments 1 and 2). Proposals must include the following.

1. Cover page including:
 - Applicant name, address, phone number, executive director name and email, fiscal officer name, email and phone number, and Federal Tax ID;
 - Applicant's status as a 501(c)(3) non-profit or government entity;
 - Title of this RFP;

- Amount of funding requested;
 - Applicant’s agreement to execute OhioMHAS Agreement and Assurances (included as Attachment 3) if awarded the grant.
2. Proposal Narrative including:
- A description of applicant’s plan and time line for completing tasks set forth in the Scope of Work.
 - Applicant’s plan for staffing the project; the plan should identify the name of the Project Manager and the On-Site Manager for monitoring and reporting on all event planning activities and adequate on-site staffing for registration, management of Summit logistics, and, end of day check-out, evaluation turn-in and distribution of CEU certificates
 - Assurance that applicant will coordinate with OhioMHAS and DODD to complete all applicable applications and processes to obtain continuing education (CE) credit
 - Applicant’s qualifications and experience relating to the scope of work, including evidence of managing event(s) with 400+ attendees
 - Applicant’s plan to collect and monitor information regarding any special need(s) requests and how arrangements will be made to meet those needs
 - Budget Table (Attachment 1)
 - *It is anticipated that a registration fee not to exceed \$125.00 per registrant for two days and \$70.00 for one day will be charged for the event; the applicant must reflect the registration income as an offset to costs submitted in the budget line A15 Conference/Training/Registration***
 - Budget Narrative (Attachment 2)

Proposal Submission

1. All proposals must be submitted electronically to: TRAUMA-SUMMIT18@mha.ohio.gov by **Monday November 6, 2017 at 5:00 p.m.** Risk of delay or failure of delivery rests with the applicant.
2. No faxed, mailed or hand delivered proposals will be accepted.

Evaluation of Proposals

Eligible proposals will be scored using the point values provided below.

Technical Criterion	Weight	Rating (0-5)	Technical Score
Work plan and time line; staffing plan	20		
Staffing plan	10		
Coordinate for CEUs and CMEs	10		
Documented experience in event planning and management	10		
Plan for tracking and meeting special needs requests	10		
Budget and budget narrative	20		
Knowledge of Ohio’s mental health, addiction, and developmental disabilities systems and their partners	20		

Total Weight	100		
Total possible technical score	500		

Award is expected to be announced by December 1, 2017 for project implementation to begin January 1, 2018.

Conditions of Award

1. OhioMHAS reserves the right to make no award, make an award for a lesser amount, make an alternative award for the specified project or make an award for a shorter duration. OhioMHAS reserves the right to ask clarifying questions, issue conditional awards, and negotiate a best and final proposal with one or more applicants(s). OhioMHAS reserves the right to waive errors and omissions that do not materially affect the proposal. Errors and omission may result in lower evaluation scores or rejection of the proposal.
2. OhioMHAS will not be liable or any costs incurred by the applicant in responding to this RFP, regardless of whether the department awards through this process, cancels the RFP, or makes the award through a different process.
3. Funding awarded pursuant to this grant depends on the availability of state and/or federal funds. Should funding be reduced or terminated, the amount of funds available for reimbursement under this grant may be reduced or terminated upon notice to awardee(s), without further obligation on the part of OhioMHAS.
4. Awardee must submit required information and data electronically, through the OhioMHAS Grants Funding Management System (GFMS) online reporting system. All information and data will be reviewed by the project staff. Failure to comply with reporting requirements shall result in further action by OhioMHAS, which may include withholding of funds.
5. Awardee will be solely responsible for reporting, withholding, and paying all employment related taxes, payments, and withholdings for all personnel, including but not limited to: Federal, State and local income taxes, social security, unemployment or disability deductions, withholdings, and payments.
6. Awardee must execute OhioMHAS Agreement and Assurances upon notice of award. No requests for edits, additions or deletions will be considered. Please read the OhioMHAS Agreement and Assurances prior to submission of your application and do not apply if you are unable to comply with any component. (For reference, a copy of the Agreement and Assurances can be found in Attachment

