



Request for Proposal
OPEC Conference Coordination 2019
Bureau of Prevention
MHA-19-PW-OPEC-52

Funding period SFY 2019: December 1, 2018-June 30, 2019

John R. Kasich, Governor
Dr. Mark Hurst, Director

FUNDING OPPORTUNITY

The Ohio Department of Mental Health and Addiction Services (OhioMHAS) is planning the 2019 OPEC Conference to expand opportunities for prevention practitioners to receive knowledge on cutting edge prevention science, increase competency in the selection and implementation of evidence based practices, develop an understanding of trauma and trauma informed care, enhance collaborative and collective impact efforts, and provide opportunities for sharing and networking of prevention efforts across the state founded in cultural competency and equity. The target audience for this conference includes public and private providers and administrators of behavioral health entities, health departments, educators, social workers and others working with children and families.

OhioMHAS seeks proposals for up to \$100,000, for event planning and management services for the multi-day annual OPEC Conference to be held in Columbus, Ohio in June of 2019. Anticipated attendance for the event is up to 400 individuals. The event coordination will include contracting with the venue, managing participant registrations, communicating with the participants and presenters, providing regular updates to the OhioMHAS staff, and additional duties as outlined below.

Scope of Work

- Designate a project manager responsible for monitoring and reporting on event management activities. The project manager will frequently and regularly communicate with designated OhioMHAS staff and provide regular updates for the OPEC Planning Committee.
- Secure the event venue, subject to OhioMHAS approval, and engage in a contract with the facility.
- Coordinate on-site conference logistics with OhioMHAS, and chosen facility.
- Finalize the event date and time, ensuring that necessary rooms have been scheduled and that rooms meet conference requirements
- Determine and arrange for facility to provide conference support including Audio-Visual and other equipment, lighting, room set-up, and supplies
- Arrange for morning coffee, mid-morning break, lunch, and mid-afternoon break for conference participants
- Contact and engage in agreement or contract with conference keynote speaker(s) and all other presenters. Correspond with presenters to assist in meeting needs, including AV equipment and support, travel or hotel accommodations, and other appropriate needs.
- Coordinate with OhioMHAS to secure materials for continuing education (CE) applications from the OPEC planning committee and the presenters, and assist in CE application process. Verify participant attendance and provide printed certificates for attendees.
- Coordinate the following participant registration activities:
 1. Develop and manage a participant registration website and provide confirmation correspondence to registrants, including the conference details (e.g., agendas, start times, break out assignments).
 2. Collect and monitor information regarding any special needs requests, e.g. interpretation services, dietary restrictions. Coordinate with venue to ensure necessary arrangements are in place to meet identified needs.
 3. Provide fiscal tracking and management of all registration fees. Accept cash, check, and credit card as methods of payment. Process invoices and Intra-State Transfer Vouchers (ISTVs) for payment.
 4. Manage the process for compensatory registrations.

5. Permit registration and payment of fees the day of the conference, and post-conference.
 6. Collect and assemble all presentations and handouts; provide an electronic web-link to these documents to all registrants, at least one week prior to the conference. Have sufficient hard copies of materials at the conference for participants registering the day of the conference.
 7. Supply name tags for registrants and presenters.
 8. Provide OhioMHAS with an electronic list of registrants' names, addresses, email addresses and professional licensure as requested.
 9. Please note that the registration fee will be determined by OhioMHAS. Costs for the meals, breaks, and other refreshments must be paid from the registration fees collected. The total of registration fees that are in excess of the food and beverage costs must be returned to OhioMHAS
- Provide a site manager and adequate staff on-site the day of the conference to:
 1. Manage registration desk efficiently, in particular for the morning registration, throughout the conference day, and at the closure of the conference to assist with continuing education certificates
 2. Assist with documentation relating to CEs, and evaluations
 3. Provide signage for conference rooms and ensure availability of technical assistance staff and operability of audio-visual equipment
 4. Assist with coffee/breakfast, lunch, and breaks, as needed
 5. Coordinate all other on-site needs, including any attendee special accommodations
 6. Manage other event operations, as necessary
 - Funding Procedures and Reports
 1. Complete all necessary grant funding application paperwork for reimbursement from OhioMHAS.
 2. Provide required fiscal updates and monitoring as requested.
 3. Compare budget amounts to actual expenditure items (e.g., staff salaries, caterer payments, supplies).
 4. Collaborate with OhioMHAS staff to determine a date for the final fiscal report post-conference.
 5. Provide final fiscal report and reconciliation of outstanding bills/payments.
 - Prepare report on trainings:
 1. Provide OhioMHAS with a summary report of the evaluations within 45 days after conference.
 2. Distribute post-conference correspondence to conference presenters.

Eligible Applicants

The applicant must:

- Hold a permanent 501(c)(3) or (4) non-profit status, or be a general or special purpose government entity (MBE/EDGE);
- Execute the OhioMHAS Agreement and Assurances without modification (See Appendix A);
- Have demonstrated experience in statewide behavioral health, training/conference pre-planning, on-site, and post-event management services;
- Have the ability to receive registration payment by cash, check, credit card, and process purchase orders, invoices, or Intrastate Transfer Vouchers (ISTV) for registrants; and
- Be familiar with Ohio's behavioral health system

Funding Timeframe

December 1, 2018-June 30, 2019

Conference Dates June 23-26, 2019

Proposal Application & Guidelines

The combined page limit for the project narrative and applicant qualifications and experience section is five (5) single spaced pages in 12 point Times New Roman font. This page limit does not include the cover sheet, the budget table (Attachment 1), and budget narrative (Attachment 2).

Only one email should be submitted, including all components of the proposal contents as attachments. Proposal submissions must include the following:

- 1) Cover Sheet
 - a) Name of applicant, address, phone number; executive director name and contact information; fiscal officer name and contact information; and, applicant's federal tax ID
 - b) Applicant's status as a 501(c)(3) or (4) non-profit or government entity;
 - c) Title of this RFP
 - d) Amount of funding requested
 - e) Applicant's agreement to execute OhioMHAS Agreement and Assurances (Appendix A) if awarded the grant
- 2) Project Narrative and Applicant Qualifications and Experience: The proposal narrative and applicant qualifications and experience section should include:
 - a) Description of the applicant's work plan and time line for completing tasks set forth in the Scope of Work, including information regarding applicant's ability to process and track payment of registration fees and conference costs;
 - b) Applicant's plan for staffing the project
 - c) Applicant's qualifications and experience relating to the Scope of Work
 - d) Applicant's knowledge of Ohio's behavioral health systems and partners
- 3) Budget (Attachment 1)
- 4) Budget Narrative (Attachment 2)

Questions and Updates

1. The Request for Proposal and all FAQs will be posted on the OhioMHAS website.
2. All questions must be submitted electronically no later than **by 12:00pm November 9, 2018** to OhioMHAS at: MHAS-OPWGRANTS@mha.ohio.gov
3. Responses to all frequently asked questions (FAQ) will be posted to the OhioMHAS website at <http://mha.ohio.gov> and will be updated frequently.
4. 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 could result in disqualification of a proposal.

Proposal Submission

1. All proposals must be submitted electronically to: MHAS-OPWGRANTS@mha.ohio.gov by **Friday, November 16, 2018 at 5pm**. Proposals must be received by this time to be considered. It is highly encouraged that applicants completely review the application, along with the required responses, prior

to beginning the application process to provide adequate time and opportunity for required responses and signatures.

2. No faxed, mailed or hand carried applications will be accepted.

Award

1. Awards are expected to be announced at the end of November, 2018 for project implementation to begin immediately.

2. All funds for this project must be **obligated by June 30, 2018, no exceptions.**

Selection Process and Criteria

Each applicant will be evaluated using consistent criteria developed from the Self-Assessment and Proposal Guidelines.

Rating Scale:

0—Does Not Meet. Proposal does not comply with the requirement or does not meet expectations for the criterion.

1—Weak. Proposal does not substantially comply with the requirement and/or does not substantially meet expectations for the criterion.

2—Moderate. Proposal generally meets requirement, but is weak in meeting minimal expectations for the criterion.

3—Meets. Proposal meets the requirement and meets expectations for the criterion.

4—Strong. Proposal meets the requirement and exceeds expectations for the criterion.

5—Greatly Exceeds. Proposal meets the requirement and greatly exceeds expectations for the criterion.

Mandatory Requirements:

Mandatory Requirements	Meets	Does Not Meet
Applicant is 501(c) (3) or (4) non-profit or government entity		
Agrees to sign Agreements and Assurances upon award		

Criterion	Rating (R)	Weight (W)	Total Possible Score (R x W)
Proposal demonstrates strong experience in event planning and management		30	150
Work plan and time line for completion of Scope of Work activities demonstrates applicant’s understanding of the work and a reasonable plan for timely completion of the work		20	100
Staffing plan meets identified needs		10	50
Applicant demonstrates familiarity with Ohio’s mental health and addiction systems and system partners		10	50
Budget is reasonable and within the allotted amount available		15	75
Budget narrative clearly describes the budget and adequately justifies identified costs		15	75
Total Weight		100	

Criterion	Rating (R)	Weight (W)	Total Possible Score (R x W)
Total Possible Score			500

Conditions of Award

- The Department 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. The Department reserves the right to ask clarifying questions, issue conditional awards, and negotiate a best and final proposal with one or more applicants(s). The Department reserves the right to waive errors and omissions that do not materially affect the proposal. Errors and omissions may result in lower evaluation scores or rejection of the proposal.
- 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.
- As authorized in Ohio Revised Code Section 5119.61, OhioMHAS will collect information and data from awardee. Awardee will provide required information and data electronically, through online reporting systems. All information and data will be reviewed by project staff. Failure to comply with reporting requirements shall result in further action by OhioMHAS, which may include withholding of funds.
- Grantee will be solely responsible for reporting, withholding, and paying all employment related taxes, payments, and withholdings for his/her self and any personnel, including but not limited to: Federal, State, and local income taxes, social security, unemployment or disability deductions, withholdings, and payments.
- Grantee must execute OhioMHAS Agreement and Assurances upon notice of award. (For reference, a copy of the Agreement and Assurances can be found at <https://mha.ohio.gov/Funding/Grant-Support/Grant-Guidance>)

Deadline for submission of all proposals is **Friday November 16, 2018 by 5:00PM**

Eastern Daylight Savings Time to:

MHAS-OPWGRANTS@mha.ohio.gov

Appendix 1

Ohio Department of Mental Health and Addiction Services SFY 2019 Budget/Expenditure Form

Implementing Agency:	
Grant Program Area:	
Budget Period:	
State Grant:	

For OhioMHAS Internal Use Only

- Initial Application
- Budget Revision*
- Expenditure Report

Budget Summary:

Cost	MHAS Amount	Other Amount	Total
Personnel	\$0	\$0	\$0
Fringe Benefits	\$0	\$0	\$0
Travel	\$0	\$0	\$0
Equipment	\$0	\$0	\$0
Supplies	\$0	\$0	\$0
Contractual	\$0	\$0	\$0
Other	\$0	\$0	\$0
Total Direct Costs	\$0	\$0	\$0
Total Indirect Costs	\$0	\$0	\$0
Grand Total	\$0	\$0	\$0

Prepared By: _____

Fiscal Signature: _____

Date: _____

*Prior written approval must be obtained from OhioMHAS before incurring costs that exceed a 10% change between Budget Categories or any change to Category IV.

Appendix 3

Ohio Department of Mental Health and Addiction Services SFY 2018 Line Item Budget Form

Personnel:

Direct Costs	Annual Salary	Level of Effort	MHAS	Narrative	Other	Narrative
Name, Title	\$0	0 FTE	\$0	Insert explanation of how expenditures were calculated and the justification for the expended funds for the devoted project	\$0	Insert explanation
Name, Title	\$0	0 FTE	\$0	Insert explanation	\$0	Insert explanation
Total Personnel			\$0		\$0	

Fringe Benefits:

Direct Costs	MHAS	Narrative	Other	Narrative
Name, Title	\$0	Insert explanation of how expenditures were calculated and the justification for the expended funds for the devoted project	\$0	Insert explanation
Name, Title	\$0	Insert explanation	\$0	Insert explanation
Total Fringe	\$0		\$0	

Travel:

Direct Costs	MHAS	Narrative	Other	Narrative
Mileage	\$0	Insert explanation of how expenditures were calculated and the justification for the expended funds for the devoted project	\$0	Insert explanation
Airfare	\$0	Insert explanation	\$0	Insert explanation
Lodging	\$0	Insert explanation	\$0	Insert explanation
Meal Per Diem	\$0	Insert explanation	\$0	Insert explanation
Total Travel	\$0		\$0	

Equipment:

Direct Costs	MHAS	Narrative	Other	Narrative
Computer/ Equipment	\$0	Insert explanation of how expenditures were calculated and the justification for the expended funds for the devoted project	\$0	Insert explanation
Furniture	\$0	Insert explanation	\$0	Insert explanation

Direct Costs	MHAS	Narrative	Other	Narrative
Total Equipment	\$0		\$0	

Supplies:

Direct Costs	MHAS	Narrative	Other	Narrative
Printing/ Copying	\$0	Insert explanation of how expenditures were calculated and the justification for the expended funds for the devoted project	\$0	Insert explanation
Subscription/ Publication	\$0	Insert explanation	\$0	Insert explanation
Total Supplies	\$0		\$0	

Contractual:

The cost of consultants and other independent contractors (including their invoiced support costs), temporary help, and task and deliverables based sub-contracts (if described in the grant's proposal or subsequently approved by OhioMHAS).

Direct Costs	MHAS	Narrative	Other	Narrative
Personal Service Contracts	\$0	Insert explanation of how expenditures were calculated and the justification for the expended funds for the devoted project	\$0	Insert explanation
Honorarium	\$0	Insert explanation	\$0	Insert explanation
Total Contractual	\$0		\$0	

Other:

Direct Costs	MHAS	Narrative	Other	Narrative
Conference/ Training	\$0	Insert explanation of how expenditures were calculated and the justification for the expended funds for the devoted project	\$0	Insert explanation
Registration	\$0	Insert explanation	\$0	Insert explanation
Food	\$0	Insert explanation	\$0	Insert explanation
Total Other	\$0		\$0	

TOTAL DIRECT COSTS:

Direct Costs	MHAS	Other
Total Direct	\$0	\$0

Indirect Costs:

Indirect Costs	MHAS	Narrative	Other	Narrative
Rent/Lease	\$0	Insert explanation of how expenditures were calculated and the justification for the expended funds for the devoted project	\$0	Insert explanation
Fleet	\$0	Insert explanation	\$0	Insert explanation
Maintenance/ Repair	\$0	Insert explanation	\$0	Insert explanation
Insurance	\$0	Insert explanation	\$0	Insert explanation
Phone Bill/ Utilities	\$0	Insert explanation	\$0	Insert explanation
TOTAL INDIRECT COSTS	\$0		\$0	

Costs	MHAS		Other	
GRAND TOTAL	\$0		\$0	

*Prior written approval must be obtained from OhioMHAS before incurring costs that exceed a 10% change between Budget Categories or any change to Category.