

**Office of Prevention and Wellness
Bureau of Children and Families
REQUEST FOR PROPOSAL RFP
System of Care Summit Event Coordination**

Request for Proposal Number: MHA-19-PW-SOCsummitEvent-38

Request for Proposal Issued: January 29, 2018

Proposal Due Date: February 23, 2018

Background and Purpose: The Ohio Department of Mental Health and Addiction Services (OhioMHAS) is planning the 2018 System of Care (SOC) Summit to support ongoing education, networking, and sharing of new and innovative best practices for Ohio's children and families with behavioral health needs. The target audience for the summit includes public and private providers and administrators of children, youth, and young adult behavioral health (mental health and substance abuse), child welfare, physical health, juvenile justice, and education systems. Youth and families are at the heart of this summit and as such will be invited to participate in all aspects of the summit. The intent is to bring ideas, proposals, and collaborative partnerships from the summit into existing and new SOC action items, which will be included into state and regional behavioral health policy priorities.

OhioMHAS seeks proposals for event planning and management services for a two (2) day statewide SOC Summit to be held in Columbus, Ohio in the fall of 2018. Anticipated attendance for the two-day training is up to 500 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.

Awardee will work closely with OhioMHAS and the SOC Summit Planning Committee regarding the details of the agenda, presenters, attendees, venue, the registration process, and other matters as needed.

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;
- Execute the OhioMHAS Agreement and Assurances without modification (See Appendix A);
- Have demonstrated experience in statewide behavioral health, training/summit 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 mental health and addiction systems and system partners.

Fund Source and Requirements

- **Period of Funding:** Funds will be made available upon review and decision by OhioMHAS. Award will be made to a single applicant.

I. Scope of Work

- A. 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 SOC Planning Committee.
- B. Secure the event venue, subject to OhioMHAS approval, and engage in a contract with the facility.
- C. Coordinate on-site summit logistics with OhioMHAS, and finalize with facility:
 1. Finalize the event date and time, ensuring that necessary rooms have been scheduled and that rooms meet summit requirements
 2. Determine and arrange for facility to provide summit support including Audio-Visual and other equipment, lighting, room set-up, and supplies
 3. Arrange for morning coffee, mid-morning break, lunch, and mid-afternoon break for summit participants
- D. Engage in agreement or contract with summit keynote speaker(s), as necessary. Correspond with presenters to assist in meeting needs, including AV equipment and support, travel or hotel accommodations, and other appropriate needs.
- E. Coordinate with OhioMHAS to secure materials for continuing medical education (CME) and continuing education (CE) applications from the summit planning committee and the presenters, and assist, as necessary, in CME/CE application process. Verify participant attendance and provide printed certificates for attendees.
- F. Coordinate the following participant registration activities:
 1. Develop and manage a participant pre-registration website and provide confirmation correspondence to registrants, including the summit 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 summit, and post-summit.
 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 summit. Have sufficient hard copies of materials at the summit for participants registering the day of the summit.

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

G. Provide a site manager and adequate staff on-site the day of the summit to:

1. Manage registration desk efficiently, in particular for the morning registration, throughout the summit day, and at the closure of the summit to assist with continuing education (CME/CE) certificates
2. Assist with documentation relating to CME/CEs, and summit evaluations
3. Provide signage for summit 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

H. 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-summit.
5. Provide final fiscal report and reconciliation of outstanding bills/payments.

I. Prepare report on trainings:

1. Provide OhioMHAS with a summary report of the evaluations within 45 days after summit.
2. Distribute post-summit correspondence to summit presenters.

II. Questions, Technical Assistance, and Updates

- A. All questions must be submitted electronically no later than 02/07/18 by 4:00 p.m. Questions may be submitted at MHAS-BCYFgrants@mha.ohio.gov
- B. **No questions will be answered after the deadline.** Questions and responses will be posted within two business days of receipt of the question at (<http://mha.ohio.gov/Default.aspx?tabid=725>)
- C. 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.

D. Interested parties are required to monitor this website for any updates to the RFP.

III. Proposal Contents

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:

A. Cover Sheet

1. Name of applicant, address, phone number; executive director name and contact information; fiscal officer name and contact information; and, applicant's federal tax ID
2. Applicant's status as a 501(c)(3) or (4) non-profit or government entity;
3. Title of this RFP
4. Amount of funding requested
5. Applicant's agreement to execute OhioMHAS Agreement and Assurances (Appendix A) if awarded the grant

B. **Project Narrative and Applicant Qualifications and Experience:** The proposal narrative and applicant qualifications and experience section should include:

1. 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 summit costs;
2. Applicant's plan for staffing the project
3. Applicant's qualifications and experience relating to the Scope of Work
4. Applicant's knowledge of Ohio's mental health and addiction systems and partners

C. **Budget** (Attachment 1)

D. **Budget Narrative** (Attachment 2)

IV. Proposal Submission

A. **Proposal Due Date:** 02/23/2018 2018 at Noon

Proposals must be received by this time to be considered. Risk of delay or failure of delivery rests with the applicant.

B. **Where to Submit:** All proposals must be submitted to: MHAS-BCYFgrants@mha.ohio.gov. No faxed, mailed, courier delivered, or hand carried proposals will be accepted. In the email subject line, enter Forensic Summit Event Coordination. Only one email should be sent, including all required content elements listed in Section III.

V. Proposal Evaluation

Proposals will be scored using the point values provided below.

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	
Total Possible Score			500

Anticipated Date of Award Announcement: 03/23/2018

VI. Conditions of Award

A. 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 omissions may result in lower

evaluation scores or rejection of the proposal.

- B. OhioMHAS will not be liable for any costs incurred by 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.
- C. 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.
- D. As authorized in Ohio Revised Code Section 5119.61, OhioMHAS will collect information and data from awardee. Failure to comply with reporting requirements shall result in further action by OhioMHAS, which may include withholding of funds.
- E. Awardees 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.
- F. Awardees must execute OhioMHAS Agreement and Assurances upon notice of award. No requests for edits, additions or deletions will be considered. This is non-negotiable. Please read the OhioMHAS Agreement and Assurances prior to submission of your proposal 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 Appendix A).
- G. The following conditions apply to deliverables provided by the awardee(s): All items, products, deliverables and intellectual property developed, produced, dependent upon, derived from and/or begun as a result of this award shall:
 - 1. Identify OhioMHAS and, if applicable, the federal grant, as the funding source;
 - 2. Reserve to OhioMHAS - and to the federal government if this sub-award includes federal funds - a royalty-free, nonexclusive and irrevocable right to reproduce, publish, or otherwise use the work for public purposes, and to authorize others to do so;
 - 3. Be provided to OhioMHAS as specified in the award; and
 - 4. Be approved by OhioMHAS before dissemination.This paragraph does not apply to copyrighted materials purchased or licensed for use pursuant to this award except to the extent that the rights of copyright ownership were purchased with grant support.

H. Deadline for Completion of Funded Work: December 31, 2018

Proposal Due Date: February 23, 2018 at Noon.