

Transportation Association of Maryland Annual Conference Event Planner Request for Proposal Responses to this proposal are due by October 1, 2023.

- I. OVERVIEW. The Transportation Association of Maryland (TAM) is seeking a qualified and experienced event planner ("Event Planner") to manage the execution of TAM's annual conference ("Conference"), to be held at the Chesapeake Bay Beach Club (CBBC) in Stevensville, MD on September 17-19 (Tuesday-Thursday) 2024. The Event Planner's services include, but are not limited to concept development, planning, assistance with sponsorship, event registration, event production, and overall event management coordination, including day-of-event coordination and implementation. For more detailed information, see SECTION IV. SCOPE OF WORK of this Request for Proposal ("RFP") below.
- II. ORGANIZATIONAL INFORMATION. TAM is a 501(c)(3) nonprofit organization founded in 1985 that is committed to advancing the cause of Maryland community transportation through advocacy and professional development.
- III. EVENT DESCRIPTION. The TAM Conference is TAM's signature, annual networking and professional development event, with an attendance of over 250 attendees and exhibitors. The income realized raised from our Conference supports TAM's key professional development programming and advocacy work throughout the year.

The Conference features an elegant vendor reception and trade show, an outdoor bus showcase, and an awards program honoring individual and organizations and exhibiting excellence in the community transportation profession. We recognize the TAM Driver of the Year recipient, an individual who exemplifies the qualities sought in a transit operator. Additionally, two of our member organizations are recognized as our Transit System of the Year as well as our Non-Profit of the Year, as well as awards for Unsung Transit Hero, Friend of Transit, and Outstanding Marketing Program.

TAM's 2023 Conference information can be found on our website (www.taminc.org/conference). As referenced above, the venue is confirmed at the CBBC. The Conference begins on Tuesday with a lite breakfast (7:30 a.m. – 8:30 a.m.), in our reception area. Our Keynote Address takes place from 8:30 a.m. – 10:00 a.m. Following this, we will be hosting general and breakout sessions until 4:00 p.m. at which point attendees will move outside for our bus showcase. At 6:00 p.m., our Vendor Reception and Trade Show begins, running until 8:30 p.m. Vendors will have tables set up around the perimeter of a large room that will also feature an open bar and food stations. Limited seating is available.

On Wednesday, following breakfast (7:30 a.m. to 8:30 a.m.) our General Meeting is held (8:30 a.m. to 10:00 a.m.). We then have breakout sessions for the remainder of the day. At lunch (12:00 p.m. – 1:30 p.m.) our Awards lunch is held and our winners are recognized. From 6:00 p.m. to 10 p.m. our main social event of the conference is held, called our partnership dinner. This is often a themed event – our 2023 theme is 'Game Show Night'.

On Thursday, following breakfast (7:30 a.m. to 8:30 a.m.) we host breakout sessions for the remainder of the day, broken up by a picnic lunch from noon to 1:00 p.m. The conference is complete by 5:00 p.m.

- IV. SCOPE OF WORK. The Event Planner will be expected to provide all services necessary and appropriate to manage and execute TAM's 2024 Conference, including but not limited to the services ("Services") detailed herein. The Services outlined herein is not intended to be exhaustive. The selected Event Planner will be expected to be, among other needed skills: organized; detailed oriented; flexible; an effective verbal and written communicator; calm under pressure; and a negotiator in the best interest of the Conference and TAM.

A. EVENT MANAGEMENT.

- Establish regular ongoing communication with TAM and work closely with TAM to determine overall look and theme of Conference, including the layout and flow of Conference, and to ensure effective internal communications and a collaborative and cooperative process
- Draft, manage, and finalize the Conference's show plans, deployment schedule and assist with execution of all related tasks
- Identify potential challenges and recommend solutions
- Serve as liaison with vendors, venues, exhibitors, sponsors, and other Conference stakeholders ("Third Parties") and upon TAM's written request, serve as proxy for certain matters
- Ensure Conference complies with applicable laws and regulations
- Ensure all authorized agents and/or staff of Event Planner are qualified to perform services in accordance with best industry standards (Event Planner will not subcontract any tasks to third parties without TAM's prior written consent);
- Exercise duty of loyalty and good faith in favor of TAM when negotiating with third parties (Event Planner will present all contracts to TAM for TAM's final approval).

B. DELIVERABLES.

- Develop and update a detailed show plan for TAM, which details anticipated tasks
- Maintain a spreadsheet of registrants and exhibitors for the conference, including their payment status
- Secure the best possible pricing for all expenditures relating to Conference, providing documentation (unless waived by TAM) showing that a competitive, fair and transparent Request for Quotations process was used and followed, where at least three vendors were considered and details supporting the reasoning as to why the selected vendor is ultimately recommended
- Oversee and manage all approved vendor relationships and ensure vendor deliverables are delivered on-time, and maintain a vendor list as vendors are confirmed

- Manage all attendee and exhibitor payments due to TAM to ensure payments can be made in a timely manner
- Meet and act as primary point of contact for related vendors, including but not limited to the following:
 - Food & beverage
 - Audio and Visual
- Provide TAM with regular updates of Conference progress
- Draft, manage, and distribute a complete show plan for the entire Conference, including load in, setup, rehearsals to all parties, including but not limited to the client, vendors, and venue
- Participate in client meetings (or conference calls through any electronic means) or any additional meetings and/or calls as needed, or reasonably requested by TAM, including scheduling and walk-throughs
- Other duties as assigned.

C. GENERAL MANAGEMENT.

- Provide general administration, management, day-of execution and manage pre-event and on-site Conference registration.
- Create weekly reports for follow-ups and identify who should receive the reports
- Ensure all VIP guests, dignitaries, and sponsors are seated appropriately at Conference
- Ensure all required insurance certificates are obtained
- Ensure a full walk-through/rehearsal prior to the Conference.

D. SPONSORSHIP FULFILLMENT.

- Work with TAM staff to ensure sponsorship packages are fulfilled appropriately at Conference
- Assist with sponsorship strategy
- Assist with sponsor fulfillment benefits.

E. ON-SITE MANAGEMENT

- Provide a Manager to oversee On-Site Management, as detailed herein
- Oversee the registration, bag, conference wear, and ticket distribution process
- Oversee a/v staging, room setups, signage, sponsors space, registration, gift bags, and any other related line items;
- Manage volunteers and staff for Conference;
- If necessary and approved by TAM, recruit, train and supervise paid staff for positions not filled by volunteers
- Execute the overall direction on Conference logistics;
- Manage the badge process/ bags production

F. SPEAKER MANAGEMENT

- Secure and manage hotel accommodations;

V. MASTER SERVICES AGREEMENT. This RFP does not constitute a contract. TAM will negotiate a Master Services Agreement (“MSA”) with the selected Event Planner. The MSA will include customary representations and warranties and confidentiality provisions, including a requirement that the Event Planner will ensure that each of its staff, agents, vendors, and other subcontracted third parties sign confidentiality agreements that are at least as protective of TAM’s confidential and proprietary information as those contained in the MSA. In addition, the selected Event Planner will perform the duties requested as an independent contractor and not as an employee of TAM. Once the MSA is fully executed, the Event Planner agrees that it will not accrue additional expenses and remain on budget. The selected Event Planner does not have the authority to incur expenses on TAM’s behalf without TAM’s prior written approval.

VI. RFP FORMAT & GUIDELINES.

A. FORMAT. Proposals must be received via email to jduklewski@taminc.org in a single electronic PDF attachment

B. GUIDELINES. The proposal shall include the following sections:

1. Executive Summary. Summary of the Event Planner’s background, past experiences similar to the Services expected for Conference, and basic understanding of the Services required, and reasons why the Event Planner should be selected.
2. Company Overview. Overview of the Event Planner’s business organization structure, including the following:
 - List of each jurisdiction where the Event Planner has been incorporated and is qualified to do business;
 - Total full-time and part-time employees of the Event Planner
 - Whether the Event Planner has been involved in any disputes with former or current employees and/or vendors (if the matter is settled and is confidential, please provide a general description of the basis of the dispute)
 - Whether the Event Planner has been involved in a dispute with one of its clients regarding event planning services (if the matter is settled and is confidential, please provide a general description of the basis of the dispute)
 - Total number of substantially similar events to the service requested during the past three years
 - Whether the Event Planner has experienced any significant organizational developments (e.g. merger, reduction, acquisition, etc.) during the past three years.
3. Fees. Provide (1) proposed project fee, including description of all costs and fees the Event Planner propose to charge TAM. Fee should be in the form of a combination of fixed flat costs for conference management as well as profit-sharing arrangement with exhibitor and sponsor sales. During our previous event planner relationship,

total exhibitor and sponsorship sales numbers went from 30 in 2018 to 43 in 2022, while attendees increased from 215 to 251.

4. References. List of at least three (3) events, substantially similar to Conference, including references for each whom the Event Planner has performed similar event planning services (Names, Address, Email, and Contact Number).
 5. Samples. Sample of previous work related to the Services (e.g. conference final report, show plan with pre/during/post deliverables,
 6. Other Information. Any additional information that Event Planner believes will be relevant to the RFP and the Event Planner's capability to provide the Services.
 7. Signature. The proposal must be signed by a representative of the Event Planner that is authorized to commit on behalf of the Event Planner.
- VII. PROPOSAL EVALUATION. TAM reserves the right to accept or reject any and all proposals, without prior discussions, and grant final acceptance to the proposal that best meets the needs and interests of TAM, in its sole discretion. TAM will be the sole judge of whether a proposal meets the required RFP criteria.
- VIII. CONFIDENTIALITY CLAUSE. Any information disclosed by TAM herein (and any related correspondence and/or attachments) is considered confidential and constitutes the proprietary information of TAM. All submission will become the property of TAM and will be treated as confidential between TAM and the Event Planner. TAM will use its commercially reasonable efforts not to disclose the contents of the Event Planner's proposal to other participants or the public. TAM reserves the rights to discuss the submissions with its staff and Board of Directors, references provided by the Event Planner, and other related parties during the evaluations process.
- IX. ACKNOWLEDGEMENT. By submitting a proposal, the Event Planner acknowledges that it has read this RFP, understands it, and agrees to be bound by its requirements. Event Planner understands and agrees that they are solely responsible for its own business expenses, except for pre-approved, reasonable business expenses related to the Conference, such as travel accommodations. Event Planner agrees to keep their fixed fee and commission proposal and other terms of their engagement open for at least sixty (60) days past the submission deadline.

Once the Event Planner is selected, TAM and the selected Event Planner must execute an MSA prior to the selected Event Planner commencing services. The Event Planner agrees

that the MSA will be a complete and exclusive agreement and will supersede all prior communications between the parties. Should TAM and the selected Event Planner be unable to agree on the terms of an MSA within a reasonable time (at TAM's sole discretion), TAM reserves the right to suspend or terminate negotiations without notice, and to pursue negotiations with another Event Planner. Any suspension or termination of negotiations shall be without liability to TAM or the selected Event Planner(s).

TAM may terminate this process (in its sole discretion) and issue a new RFP for the requested services. Each Event Planner shall assume all fees and costs (including but not limited to legal fees) incurred in responding to this RFP and negotiating the MSA with TAM. TAM shall bear no liability for any costs, fees, or liability incurred in connection with this RFP or any responses thereto. Event Planner agrees that it shall not directly contact any TAM Board Members or those who may otherwise have an affiliation with TAM, in connection with responding to this RFP. Event Planners who do not abide by this requirement may be disqualified from the RFP process.

- X. QUESTIONS. Questions about this RFP should be directed to John Duklewski, Executive Director of TAM by email jduklewski@taminc.org. All questions and TAM answers will be made available to all potential Event Planners, upon written request.