



# REQUEST FOR PROPOSAL

## CGLCC Event Management Project

### ISSUE DATE

12 July 2024

### CLOSING DATE AND TIME

24 July 2024 at 5pm Eastern Standard Time.

### CONTACT

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Bidders are advised to read and respond appropriately to all sections of the Request for Proposal (RFP). Bidders unable to provide all services described herein need not bid. Canada's 2SLGBTQI+ Chamber of Commerce will not accept proposals from bidders with a real or perceived conflict of interest



## Background

### Canada's 2SLGBTQI+ Chamber of Commerce

Canada's 2SLGBTQI+ Chamber of Commerce (CGLCC) is a national not-for-profit organization dedicated to expanding the economic opportunities and advancements of the 2SLGBTQI+ business community and to advocating on behalf of an estimated 100,000 2SLGBTQI+ owned businesses in Canada, as well as 2SLGBTQI+ professionals, students of business, allies, and ally organizations.

The CGLCC's core mission is to enable the 2SLGBTQI+ business community to grow through advocacy, education, capacity building, and connections, in partnership with allies who share our vision. We engage in this work through a number of channels, such as supplier diversity programming and certification, expanding global trade opportunities, and young entrepreneur mentorship.

More information on the organization can be found on our website: [cglcc.ca](https://cglcc.ca).

### Project Overview and Objectives

CGLCC is seeking to procure the services of an Event Management Agency or Independent Event planner to provide event management and logistics services. The majority of the project (80%) will be the 2SLGBTQI+ Business Symposium series featuring five (5) 1-day conferences for 2SLGBTQI+ entrepreneurs and business allies. The remainder of the project (20%) will be fractional *remote* event management support for 6-8 half-day regional info sessions, with 15-50 attendees per event.

#### 2SLGBTQI+ Business Symposium

- Vancouver, BC- September 11<sup>th</sup>, 2024
- Montreal, QC- October 4<sup>th</sup>, 2024
- Halifax, NS- October 22<sup>nd</sup>, 2024
- Toronto, ON- Oct/Nov 2024 date TBC
- Calgary, AB- March 2025

The CGLCC was [recently tasked with administering the first-ever 2SLGBTQI+ Entrepreneurship Program](#). Expansion of our services and programming includes outreach to entrepreneurs and ecosystem partners across the country, a key part of which includes hosting of various events in centres across Canada to further engage and support 2SLGBTQI entrepreneurs.



## Key Audiences

**CGLCC's main audiences include current and prospective:**

- 2SLGBTQI+ entrepreneurs
- Corporations
- Business-focused organizations
- Academic institutions

**CGLCC will retain primary responsibility for the following roles:**

- Conference programming
- Maintenance and updates of the CGLCC website
- Marketing and communications for the events
- Media relations
- Speaker selection and contracts
- Invitation and confirmation of partners and VIPs
- On-site physical and psychological safety of attendees

## Scope of Work

### 2SLGBTQI+ Business Symposium Series

PLEASE NOTE: All five (5) 1-day events are in different stages of planning and execution. Four (4) projects have been started, with tentative agendas, speakers, venues, and other details in place. 100-150 registrants are expected for each event, with attendance rates estimated at 80%.

	<b>Date &amp; Venue confirmed</b>	<b>Food/Catering</b>	<b>Agenda &amp; Speakers</b>	<b>Registration live</b>	<b>Exhibitors Confirmed</b>
<b>Vancouver</b>	Complete	Complete	Complete	Complete	Pending
<b>Montreal</b>	Complete	Pending	Pending	Pending	Not started
<b>Halifax</b>	Complete	Pending	Pending	Not started	Pending
<b>Toronto</b>	Pending	Not Started	Pending	Not started	Pending
<b>Calgary</b>	Not started	Not Started	Not started	Not started	Not started

## **Event Management Role**

The following scope of services will form the basis of your proposed event management fees:

- Logistical planning and onsite management
- Development and maintenance of critical path, incorporating CGLCC and event lead responsibilities, including venue and catering requirements.
- Complete management of the work plan logistics for the event.
- Provision of run-sheet and CGLCC staff orientation guide
- Weekly meetings in the final two months before the events
- Record and distribute minutes of meetings including action items.
- Manage onsite catering, events, meetings, and rehearsals, including room preparation, AV, décor, signage, and event execution.
- Coordinate all rehearsals, sound, and lighting checks.
- Set up and maintain the green room, VIP room, staff room (with equipment as required, i.e., printers, copiers), and media room (where applicable).
- Work alongside CGLCC staff to ensure first aid and security requirements are fulfilled.
- Respond to inquiries from delegates, exhibitors, and sponsors.

### **Special considerations**

- Address all accessibility, dietary, and other issues.
- Ensure all applicable licenses and appropriate insurance coverage are available.

### **Sourcing and coordinating suppliers**

- Negotiation of all supplier contracts (with sign-off from CGLCC)
- Source and coordinate suppliers as needed, with priority given to CGLCC supplier pool.
- Meet CGLCC procurement requirements for necessary services. Suppliers subject to CGLCC approval.
- Negotiate and coordinate supplier contracts and liaise with other CGLCC Symposium suppliers to ensure timely and accurate delivery of services.
- Ensure venue and hotel contract terms are fulfilled.

### **Speaker/Sponsor support**

- Ensure that all sponsor commitments and needs are met and terms of agreements fulfilled: signage, speakers, A/V needs etc.



- Manage on-site speaker's requirements, and deliverables and ensure adequate preparation.

### **Exhibitor support**

- Manage tradeshow/ecosystem showcase floorplan (15-30 exhibitors per event).
- Respond promptly to exhibitor inquiries.
- Create show services document for exhibitors.

### **Registration Service & Support**

- Set up CGLCC registration tool and processes. Internal platform to be utilized.
- Work with the CGLCC to ensure that all website registration information is up to date, accurate, and aligned with best practices.
- Supply logistical information through the registration system, including move-in/move-out schedule, floorplans, and fulfillment of booth requirements.
- Work with CGLCC to register staff, speakers, guests, VIPs, and other attendees for conference.
- Provide onsite registration support for attendees, exhibitors, and VIPs.
- Onsite delivery of attendee, exhibitor, and speaker conference materials, badges, tickets, and parking passes (exhibitors only).

### **Financial management and reporting**

- Provision of quotes and pre-approval for anticipated expenses
- Reporting on registration and finances, with weekly expenditure reporting.
- Weekly registration reports from activation of registration to four (4) weeks prior to the conference
- Daily registration reports (on business days) from four (4) weeks prior to conference day
- Prepare final registration reports, analysis, financial reporting and invoice reconciliation.

### **Preliminary Agenda & Conference Specifications**

The conference will integrate speaker and panel sessions within the trade show/ecosystem showcase, with possible modifications.

For example:

[CGLCC | Vancouver 2SLGBTQI+ Supplier Diversity Business Symposium](#)



**8:30am – 10am:** Registration, Breakfast and Ecosystem Showcase

**10:00am – 10:15am:** Opening remarks

**10:15am – 11:15am:** Supplier Diversity Panel

**11:30am – 12:30pm:** Morning Breakout Sessions

**12:30pm – 1:30pm:** Lunch

**1:30pm – 2:30pm:** Afternoon Breakout Sessions

**2:30pm -2:45pm:** Coffee Break

**2:45pm – 4:00pm:** Keynote

**4:00pm – 5:00pm:** Mingling and Ecosystem Showcase

## **Half-day info sessions**

6-8 half-day regional info sessions for 2SLGBTQI+ business community members will be held between August 2024 and March 31<sup>st</sup>, 2025. Each event will have 15-50 attendees. These events *do not* require in-person event management support. The main activities will be coordination of registration, sourcing and managing venues and catering, and communication with CGLCC project leads.

### **Event Management Role**

- Respond to inquiries from attendees and sponsors
- Weekly meetings in the month before the events
- Record and distribute minutes of meetings including action items.
- Address all accessibility, dietary, and other issues.
- Ensure all applicable licenses and appropriate insurance coverage are available.

### **Registration Service & Support**

- Set up CGLCC registration tool and processes. Internal platform to be utilized.



- Work with the CGLCC to ensure that all registration information is up to date, accurate, and aligned with best practices.

### **Sourcing and coordinating suppliers -Venue and catering**

- Source and coordinate suppliers as needed, with priority given to CGLCC supplier pool.
- Negotiation of all supplier contracts (with sign-off from CGLCC)
- Ensure venue and catering terms are fulfilled.
- Coordinate printing of badges and any other supplier-provided materials.

### **Financial management and reporting**

- Provision of quotes and pre-approval for anticipated expenses
- Reporting on registration and finances, with weekly expenditure reporting.
- Weekly registration reports from activation of registration to four (4) weeks prior to the conference
- Daily registration reports (on business days) from one (1) week prior to info session date.
- Prepare final registration reports, analysis, financial reporting and invoice reconciliation.

### **Project Timeline**

The Project's anticipated start date is August, 15<sup>th</sup>, 2024. The contract will conclude no later than March 31<sup>st</sup>, 2025.

### **Project Budget**

The project has a budget range of approximately \$40,000,-50,000 CDN (excluding HST) over the period of the contract. This includes all third-party or administration fees and any travel or incidentals proposed as part of the project. We are open to receiving proposals that might be slightly lower or higher than the given range depending on the complexity of the proposal and the activities proposed.

### **Minimum Requirements for the Bidder**

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The bidder should demonstrate that they:

1. Have expertise and experience in managing or coordinating events for 2SLGBTQI+ communities, equity-deserving groups, including Two Spirit, Indigenous, trans, and BIPOC members of the 2SLGBTQI+ community
2. Have experience working on and with 2SLGBTQI+-related projects
3. Have significant experience managing events for non-profit organizations of similar scale and scope
4. Can deliver services in both official languages.
5. Are able to meet the requirements of the project as described in this Request for Proposal; and
6. Are able to complete all work by March 31<sup>st</sup>, 2025

### Proposal Submission Guidelines

Proposals must address the following, in addition to any other information you wish to provide:

1. **Equity & Anti-Oppression:** Share information and examples of how your organization approaches equity and anti-oppression in your internal systems and external **Team:** Detail the roles and team members that will be assigned to this project as well as their experience applying an EDI lens to their work; include the tenure of team members assigned to this project, alongside the total number of in-house staff
2. **Work Plan:** Outline your approach to each phase of the project, noting the overall timeline and key milestones
3. **Work Experience:** Describe experience managing events for nonprofit organizations and/or organizations serving equity-deserving communities
4. **Budget:** Detail your proposed pricing structure and standard billing rates, including any non-profit discounts available.
5. **Communication & Workflow:** Describe what tools your team will use to communicate with CGLCC, and your general project management process.
6. **Case Studies & References:** Provide three (3) case studies and corresponding references of past similarly-scoped projects

Proposals are not to exceed 10 pages.

### Proposal Evaluation

Proposals will be evaluated by a selection committee representative of CGLCC staff. A vendor will be chosen based on a bidder's response to the enclosed service requirements and evaluated according to the criteria listed below:





#### **Agency Evaluation (45%)**

- Overall capabilities based upon understanding of project scope and activities
- Qualifications and experience as outlined in the minimum requirements of bidder
- Demonstrated experience working with equity-deserving communities and organizations serving equity-deserving groups beyond the scope of the 2SLGBTQI+ community
- Team member qualifications

#### **Proposed Work Plan (45%)**

- Understanding of project, including clarity and relevance of proposal
- Proposal preparation, thoroughness, and responsiveness to requirements of RFP
- Quality of the approach to the project and the work plan
- Outline of deliverables and how they will be met
- Identification, explanation, and justification of modified tasks and/or unique challenges expected

#### **Certified Diverse Supplier (5%)**

- Bidder is a certified Diverse Supplier with Canada's 2SLGBTQI+ Chamber of Commerce or other recognized certification body.

#### **Estimation of Project Costs (5%)**

- Budget allocations should be commensurate with level of activity in the workplan and reflect value for effort

Interviews will be conducted with shortlisted **candidates the week of July 29<sup>th</sup>**. CGLCC reserves the right to schedule a shorter follow-up meeting with the finalist candidate(s).

Any questions or clarifications can be directed to Ashleigh Brown, Director, Business Development at [ashleigh.brown@cglcc.ca](mailto:ashleigh.brown@cglcc.ca)

Questions or clarifications subject line must be "**Questions for Event Management Project**". Proposals must be submitted in English, in PDF format, to [ashleigh.brown@cglcc.ca](mailto:ashleigh.brown@cglcc.ca) no later than July 24<sup>th</sup>, 2024, 5:00 pm EST.

Proposal subject line must be "**Proposal for CGLCC Event Project**".

CGLCC will notify all bidders upon receipt of their proposal, in the form of an email. CGLCC is not responsible for bids that fail to meet this deadline.



If you require a French version of this RFP, please contact the above email with the subject line: "CGLCC Event Project-French Request."

## Key Terms of Engagement

Although not exhaustive, this list of key terms of engagement will become an integral part of the Agreement between the CGLCC and the successful bidder.

Acceptance of the Proposal: CGLCC reserves the right not to accept any proposal. The RFP should not be construed as a contract to purchase services. CGLCC shall not be obligated in any manner until a written agreement relating to an approved proposal has been duly executed.

Proposal Revisions: Proposal revisions must be received prior to the RFP submission/closing date and time.

Financing of Proposals: The cost associated with preparing and submitting proposals will not be paid by CGLCC.

Acceptance of RFP Conditions: Receipt of proposal offer will be considered acceptance of the RFP terms and conditions by the bidder.

Subcontracting: Subcontracting may be allowed in specific instances but must be previously approved in writing by CGLCC.

Project Contact: CGLCC will assign a lead project contact when the contemplated contract is awarded. The successful bidder will also assign a lead project contact at that time.

Negotiation Delay: If a written contract cannot be concluded within fifteen days of notification to the designated bidder, CGLCC may, in its sole discretion, terminate negotiations with that bidder, and either negotiate a contract with another bidder of its choice or choose to terminate the RFP process and not enter into a contract with any of the bidders.

Proposals as Part of Contract: Proposals may be negotiated with bidders and, if accepted, form part of any contract awarded.

Disclaimers/Limitations of Liability: Neither acceptance of a proposal nor execution of an agreement shall constitute approval of any activity or development contemplated in any proposal that requires any approval, permit, or license pursuant to any federal, provincial, regional district or municipal statute, regulation, or by-law. It is the responsibility of the contractor to obtain such prior to commencement of the services under the proposed contract.

Copyright: During the project period, the successful bidder shall not sell, transfer, mortgage, lease, or otherwise dispose of any tangible or intangible assets including any intellectual property purchased for Canada's 2SLGBTQI+ Chamber of Commerce (CGLCC) under the contracted agreement without prior written consent of the owners. The copyrights, trademarks, and any other intangible or tangible rights relating to the Underlying Works



belong to CGLCC and shall be delivered forthwith to CGLCC upon completion of the particular project, or as otherwise requested by CGLCC. CGLCC reserves the right to modify the conditions of the RFP, at any time up to the closing date and time.

### **Confidentiality and Security**

Other Purpose: This document or any portion therefore may not be used for any purpose other than the submission of proposals.

Security and Privacy of Information: The successful bidder must agree to comply with the CGLCC Privacy Policy regarding information received from participants in industry consultation activities. These include strict control of access to data and maintaining confidentiality of information gained while carrying out their duties under the terms of any contract.

Disclosure: All documents submitted by bidders shall become the property of CGLCC, and as such will be subject to the disclosure provisions of the Freedom of Information and Protection of Privacy Act. Information pertaining to CGLCC obtained by the bidder as a result of participation in this project is confidential and must not be disclosed. Samples of work provided as part of submission requirements remain property of the bidder.

CGLCC, ITS EMPLOYEES, AGENTS, AND CONSULTANTS EXPRESSLY DISCLAIM ANY AND ALL LIABILITY FOR REPRESENTATIONS, WARRANTIES EXPRESSED OR IMPLIED OR CONTAINED IN, OR FOR OMISSIONS FROM THIS RFP PACKAGE OR ANY WRITTEN OR ORAL INFORMATION TRANSMITTED OR MADE AVAILABLE AT ANY TIME TO A BIDDER BY OR ON BEHALF OF CGLCC. NOTHING IN THIS RFP IS INTENDED TO RELIEVE BIDDERS FROM FORMING THEIR OWN OPINIONS AND CONCLUSIONS IN RESPECT TO THIS RFP.