

Credit Union Managers Association (CUMA)

REQUEST FOR PROPOSAL

Conference and Tradeshow Co-ordinator

ISSUE DATE: July 14, 2017

CLOSING DATE: September 8, 2017

A. **INSTRUCTIONS TO INTERESTED PARTIES**

1. **PURPOSE**

The purpose of this document is to invite proposals from qualified parties to coordinate the Saskatchewan Credit Union Managers Association (CUMA) conference and tradeshow rotated between Saskatoon and Regina on an annual basis. The engagement will commence on or before December 2017 in preparation for the conference to be held in Saskatoon April 5th and 6th, 2018.

2. **PROPOSAL SUBMISSIONS**

Proposals shall be e-mailed and must be received on or before September 8th, 2017 to be considered. Proposals and/or any questions regarding the proposal process should be submitted to either: leigh.spencer@affinitycu.ca or glen.ferguson@saskcentral.com

3. **PROPOSAL ACCEPTANCE**

The lowest/highest or any proposal will not necessarily be accepted and CUMA reserves the right to reject any and all proposals.

4. **TAXES**

4.1 Goods and Services Tax must be shown as an extra.

4.2 Provincial Sales Tax must be shown as an extra where applicable.

5. **CONTRACT NEGOTIATION AND AWARD**

CUMA reserves the right to negotiate terms with the selected individual or group.

OUTLINE

PAGE

- I. Introduction
- II. Nature of Service Required
- III. Assistance Available
- IV. Information to be Supplied by the Applicant

I. INTRODUCTION

The Credit Union Managers Association (CUMA) is requesting proposals from qualified parties to coordinate the CUMA conference and tradeshow rotated between Saskatoon and Regina on an annual basis.

The deadline for submission of proposals is **September 8th, 2017**. In conformance with CUMA policy, only those proposals received up to this stated time will receive consideration. The committee will review all applications and make recommendations to the CUMA executive during our September 21st and 22nd meetings to be held in Saskatoon.

The selected individual or group will then be contacted.

II. NATURE OF SERVICE REQUIRED

CUMA is seeking proposals from individuals or groups qualified to coordinate the annual conference and tradeshow. Duties will include but are not limited to the following:

Tradeshow

- Effectively market the conference via social media, conference app, and other forms of communications to promote and market the tradeshow to potential tradeshow exhibitors.
- Continually seek out new tradeshow exhibitor opportunities with the goal to sell out all tradeshow spaces.
- Develop and update a tradeshow exhibitor invitation list. The CUMA Executive will be available for input.
- Design, collate, and distribute an invitation letter and registration package to potential tradeshow exhibitors and newly interested parties as requested.
- Collect and process all tradeshow exhibitor registrations.
- Update the tradeshow exhibitor mailing list for future years.
- Hire a company to set up and take down the tradeshow booths.
- Work with this company to design an appropriate floorplan to accommodate as many exhibitors as possible with all regular booth requirements.
- Co-ordinate an opportunity for communication between this display company and all exhibitors that may require this service.
- Assign booths in an organized, exhibitor friendly manner as paid registrations are received.
- Invoice and account for funds received and make timely and regular deposits into an account as established by the CUMA treasurer.
- Answer any and all tradeshow event questions via email and telephone that potential exhibitors may have.
- Design, collate and distribute a participant's package to all registered

tradeshow exhibitors.

- Create, prepare, and distribute double-sided nametags to all exhibitors.
- Prepare and distribute tradeshow evaluations and summarize findings for the CUMA Executive.
- Prepare and distribute door prize form for exhibitors with giveaways.

Conference

- Effectively market the conference via social media, conference app, and other forms of internal communications to promote and market the conference.
- Continually seek out new sponsorship opportunities in an effort to maximize revenue for the event.
- Coordinate and assign benefits to potential sponsors based on their financial commitment.
- Develop and update a conference sponsorship list. The CUMA Executive will be available for input.
- Design and distribute an invitation letter and brochure to potential convention sponsors on behalf of the CUMA President.
- Invoice and account for funds received and make timely and regular deposits into an account as established by the CUMA treasurer.
- Answer any and all conference event questions via email and telephone that potential sponsors may have.
- Create an electronic conference and registration brochure.
- Arrange for appropriate sponsorship signage to display at the convention.
- Input and coordinate all necessary information into the conference mobile app.
- Request from the CUMA Executive and collate lists for CUMA members achieving 25 year, 30 year, 35 year, and 40 year employment milestones in the cooperative system.
- Create a 25 year award booklet and arrange print run as required.
- Order 25 year awards gifts for all recipients.
- Co-ordinate with a CUSource contact to determine the CUMA members that will be graduating from the Fellow or Associate CUIC programs and ensure individuals are recognized with the CUMA conference package or mobile app.
- Create, prepare, and distribute double-sided nametags to all conference participants.
- Prepare and distribute conference evaluations and summarize findings for the CUMA Executive.
- Attendance at the conference including Wednesday afternoon and evening prior to the conference date.
- Attendance in person or electronically at CUMA Executive meetings as required to report on conference preparations.

Please note that all creative material and contact information is the property of CUMA.

III. ASSISTANCE AVAILABLE

Our current conference and tradeshow coordinator has expressed a willingness to assist with the planning of the conference in 2018 to assist with the successful candidate if required.

IV. INFORMATION TO BE SUPPLIED BY THE APPLICANT

In order to simplify the review process and to obtain the maximum degree of comparability, applicants are asked to organize their proposal similar to the following outline:

1. Title Page

Show the Request for Proposal subject, the name of the individual or firm, local address, telephone number, name of the contact person, and the date.

2. Table of Contents

Include a clear identification of the material by section and by page number.

3. Letter of Transmittal

(a) Briefly state the applicants understanding of the work to be done and make a positive commitment to the timeliness of the work.

(b) Indicate the proposed term of commitment.

4. Details of Plans to Service CUMA, including the following:

(a) Partners, managers and supervisors who will work on the project. Information on each should be submitted and include experience in similar type events.

5. Pricing Arrangements

Each applicant is requested to supply a pricing proposal for the services along with projected annual increases if CUMA retains the applicant's services going forward. Please note that CUMA is willing to consider an annual fee based service or commission based structure (or combination of both).

In addition, the pricing proposal should include the following:

- (a) Any additional charges such as out of pocket costs or discounts to be applied against the conference/tradeshow.