



# **USOA Annual Conference Request for Proposals Primer**

Version 2020

The *Request for Proposals Primer* provides basic information about the United States Ombudsman Association's (USOA) annual conference, as well as the proposal submission process and selection criteria. This primer is a culmination of the experience of many who have contributed over the years to the success of our conferences.

## **The Conference**

USOA's annual conferences have been held in September and October in recent years. For 2020, we will accept proposals for both September and October dates. Every effort is made to avoid U.S. and Canadian holidays, religious holidays and bridging the October 1st federal fiscal year. The average number of attendees at recent conferences has ranged between 75 and 130. The conference runs for two and one-half days, and will be preceded by two days of preconference workshops. The entire event will last for a total of four and one-half days.

## **The Conference Planning Committee**

The USOA Board elects one of its Directors to serve as Chair of the Conferences and Training Standing Committee. This individual also serves as Chair of the Conference Planning Committee subcommittee (Planning Committee). The Chair, at his/her discretion, may appoint the Host office to serve as Co-Chair of the Planning Committee and/or choose a co-chair among planning committee members.

The Planning Committee consists of USOA members who volunteer their time and talents to help plan and conduct the conference. It is composed of individuals who have active membership status with the USOA. The Planning Committee meets via conference call at times designated by the Chair, beginning in February. The primary role of the Planning Committee is to plan and conduct a noteworthy conference while ensuring a professionally and financially sound event. The Planning Committee also assists the Host, who has functional responsibility for the conference.

### **Planning Committee Co-Chairs' Responsibilities**

It is the responsibility of the Co-Chairs to delegate, coordinate, and oversee the planning of the conference, including the work of the members of the Planning Committee. The Co-Chairs are directly responsible for overseeing the following items:

- timeliness of target dates and projected goals
- quality conference program content or development
- monitoring progress of coordinators for workshops and other assigned tasks
- hotel and banquet menu selection
- publicity and promotion, including updating the USOA website
- conference budget development and compliance
- conference evaluation dissemination, collection, and analysis
- coordinating the writing of post-conference thank-you notes
- completion of final report(s), including financial accounting
- arranging for printing of pre-conference/full conference materials and (optional) app

## **Conference Host's Responsibilities**

The Host is responsible for the following broad areas of the conference:

- local publicity or public relations
- meeting the needs of attendees and presenters
- staffing the registration desk and coordinating volunteers
- A/V acquisition (if possible/necessary) and on-site technical support
- assembly of the registration bags/kits/packages
- identifying and negotiating banquet location and options, arranging walk-throughs
- managing the non-mandatory hospitality suite

The Host, in consultation with the Chair, is the liaison with the hotel.

*It is critically important that the Host, or a representative from the Host office, participate in all Planning Committee conference calls. If possible, the Host should attend the prior year's conference and be a member of the prior year's Planning Committee to gain first-hand knowledge of the planning process.*

[Up to three Host employees/conference assistants will receive complimentary conference meals and breaks while providing administrative staff support during the conference and pre-conference events.]

## **The Proposal Process**

The Chair solicits proposals 18 to 24 months preceding the conference. If it appears there may be no offers to host a conference, the Chair may approach USOA member offices to ask if they would consider hosting. The Planning Committee reviews proposals and recommends acceptance of one or more to the USOA Board. The Planning Committee may recommend rejection of all proposals and announce the solicitation of additional proposals. Upon final approval of a proposal by the USOA Board, the Chair shall negotiate a contract with a local hotel or the site of the conference. The USOA President or the President's designee is responsible for signing the final contract.

## **Selection Criteria**

### **Location**

When possible, the USOA Board prefers to move by region around the United States from year to year so proposals from an area where a conference has not recently been held may be given preference.

### **USOA Membership**

Priority consideration will be given to proposals submitted by USOA members.

## Hotel Criteria

The hotel should be large enough to accommodate the conference needs (number and size of meeting rooms, A/V accommodations, etc.) and be in a location with easy access to the major attractions and conveniences of the host city. The local Convention and Tourism Bureau is usually helpful in identifying hotels capable of accommodating the conference. The applicant should make a site visit to inspect the hotels (including guest rooms and conference facilities) if not already familiar with the hotel and its amenities.

### Primary hotel criteria:

- Negotiated group rate or guest room prices and room block availability and requirements, including availability of government rates (municipal, state, and/or federal).
- Hotel food costs. Breakfast, two breaks and lunch will be served to attendees Monday through Thursday (unless hotel registration includes breakfast). On Friday, there is typically a larger breakfast and one break. There is an opening reception with appetizers for conference attendees on Tuesday evening.
- Meeting room availability and cost. In addition to workshop and plenary session rooms for the week, the USOA Board of Directors utilizes a meeting room in the conference hotel on Sunday afternoon immediately preceding the first day of the preconference workshops. The following is an estimate based on previous conference programs:

Sunday – Board meeting	1 small room (15 people)
Monday – Pre-Conference	2 breakout rooms (10 to 40 people each); 1 meal location (20-80 people)
Tuesday – Pre-Conference	2 breakout rooms (10 to 40 people each); 1 meal location (20-80 people)
Wednesday – Conference	A.M. General Session (140 people) A.M. 2 breakout rooms (80 people each) P.M. 2 breakout rooms afternoon (80 people each) 5 smaller breakout rooms for Chapter meetings (1- 15 each)
Thursday – Conference	A.M. General Session (140 people) A.M. 2 break out rooms (80 people each) P.M. Annual meeting after lunch (140 people) 2 break out rooms early afternoon (80 people each) 2 break out rooms late afternoon (80 people each)
Friday – Conference	A. M. General Session (120 people) A.M. 2 breakout rooms (50 people each)
Monday through Friday	Registration area and tables.

(Note – Room and times may be modified as the conference program and attendance numbers require.)

- Perks offered by the hotel, such as a complimentary rooms for x number of rooms consumed, complimentary A/V, complimentary hospitality suite, writing pads, etc.

- A/V costs (Controlling A/V expenses to a minimum is the desired objective.)

Secondary hotel criteria:

- Free internet
- Free airport shuttle service
- Central location
- Free parking
- A secure room near the registration area for registration materials (event office)
- Restaurant in the hotel

**In-Kind Services**

While Host offices are not required to contribute financially to the conference outside of providing coordination, leadership and labor, proposals that offer in-kind services, such as printing and use of audio visual equipment, are welcome.

## **The Proposal Response**

Proposals must include, at a minimum, the following information:

- ✓ At least two hotel options that address the hotel criteria listed in this document. Please submit sample food and AV menus with your response identifying selections, prices, service costs and sales tax. Also include the hotel's minimum food and beverage requirements.
- ✓ Information about local airport(s), as well as ground transportation alternatives (and their approximate cost) between the airport(s) and the conference hotel options.
- ✓ The applicant's experience, capability, and manpower/staff resources to host the conference. (Please note that prior experience is not a prerequisite for submitting a proposal but it will be considered.)
- ✓ Information on local and state tax exemption on goods and services for non-profit organizations.
- ✓ A brief statement of why the proposal should be selected over other proposals.

Also, while not required, a letter from the applicant's appointing authority or other high ranking public official inviting the USOA to hold its annual conference in the proposed city/state would help to assure the Planning Committee there is sufficient support for the applicant to extend the resources required to fulfill the applicant's responsibilities.