



Request for Proposal (RFP)

Event Management 2015 – 2016

Issue Date: Monday June 30th, 2014

Closing Date: Monday July 21st, 2014 @ 4:00pm



Overview



Ontario Centres of Excellence (OCE) Inc. drives the commercialization of cutting-edge research across key market sectors to build the economy of tomorrow and secure Ontario's global competitiveness. In doing this, OCE fosters the training and development of the next generation of innovators and entrepreneurs and is a key partner with Ontario's industry, universities, colleges, research hospitals, investors and governments. A champion of leading-edge technologies, best practices and research, Ontario Centres of Excellence invests in sectors such as advanced health, digital media and information and communication technologies, advanced manufacturing and materials, and cleantech including energy, environment and water. OCE is a key partner in delivering Ontario's Innovation Agenda as a member of the province's Ontario Network of Entrepreneurs (ONE). Funded by the Government of Ontario, the ONE is made up of regional and sector-focused organizations and helps Ontario-based entrepreneurs rapidly grow their company and create jobs.

For more information, please visit our web site at www.oce-ontario.org.



Discovery is Canada's leading innovation-to-commercialization conference, showcase and tradeshow. Hosted by the [Ontario Centres of Excellence](http://www.oce-ontario.org) (OCE), Discovery brings together key players from industry, academia, government and the investment community as well as entrepreneurs, students and international representatives to pursue collaboration and business opportunities, meet employers and source talent.

Garnering over 2,600 attendees and more than 420 exhibitors in 2014, Discovery is a showcase of leading-edge technologies, best practices and research from sectors including cleantech, (energy, environment and water), health, manufacturing, aerospace, agri-food, mining, and digital media/mobile/ICT.

Renowned keynote speakers and panels ignite discussion, knowledge-sharing and new perspectives. Discovery facilitates the exchange of ideas and encourages new ways to collaborate and push the boundaries of research and innovation through to demonstration, development and commercialization. For more information, please visit the Discovery website at www.oce-discovery.com.

Discovery 2015-2016 Conference Requirements

The objective of this multi-year Request for Proposal (RFP) is to solicit proposals to provide Event Management and Logistic services for OCE's annual Discovery Conference in 2015 and 2016. Discovery **2015** will be held **April 27th and 28th** on the 800 level of the Metro Toronto Convention Centre in the South Building. Discovery **2016** will be held in the same location **May 9th and 10th**.

Details of the services required are outlined below but are subject to change. The 2014 conference agenda and floor plan are attached for your reference.

Issuance of this RFP does not commit Ontario Centres of Excellence to pay any cost incurred in the preparation and submission of a response, or to procure a contract for any services, software, and/or equipment.

Conference Objectives

- Build profile for OCE and its stakeholders towards forming new partnerships with industry by maximizing networking opportunities
- Build profile for OCE and its stakeholders with new sources of funding
- Provide a forum for collaboration – exchanging new ideas and critical information between government, researchers, academia, industry, entrepreneurs, students and investors
- Showcase Ontario's research and technologies, including those currently being developed with OCE support, to a diverse range of receptors and potential partners including small, medium and large companies, governments, foreign markets, academia and media towards supporting Ontario's industrial growth, expansion of markets and the creation of Ontario-based employment in sectors OCE serves
- Provide forum for students to enhance their knowledge of career opportunities in key sectors and for employers to meet with the highly qualified talent within Ontario's post-secondary institutions.
- Produce opportunities to showcase entrepreneurs to investors, other companies and academia

Our goal each year is to find new and better ways to meet the needs of our participants, increase exhibitor and attendee ROI, provide unique content to stimulate ideas and discussion, improve delivery of our event and maintain Discovery as the "must-attend" event in the innovation space.

Target Audience

- Industry (Owners, Presidents/CEOs, heads/members of corporate R&D teams)
- Entrepreneurs
- Investment community (Angels, VC, Financial Institutions)
- Regional Innovation Centres
- Provincial, Federal and other government
- University Presidents, Deans and administration
- Procurement representatives
- Academic researchers
- Post-secondary students
- Media

The audience is primarily Canadian, with most residing in Ontario.

Key messages/themes

- The showcase for Ontario's economic engine of the future - today
- A destination for leaders in research, innovation, business and technology transfer
- A forum for collaboration – exchanging new ideas and critical information between researchers, academia and industry
- The conference will support OCE's agenda as the champion and key facilitator of Ontario's culture of innovation
- The conference will support and showcase the Ontario Network of Entrepreneurs (ONE)
- Key themes we are exploring for the focus and content of the event include:
 - Innovation
 - Collaboration
 - Commercialization
 - Research
 - Talent
 - Competitiveness
 - Entrepreneurship
 - Convergence

Preliminary Conference Specifications for 2015

- **Dates:**
 - **Sunday, April 26th**
 - Load in
 - **Monday, April 27th**
 - Show floor opens at 9am
 - Pre-meetings and workshops
 - Opening remarks
 - Keynote speaker
 - Networking Reception
 - Show floor closes at 7pm

- **Tuesday, April 28th**
 - Exhibitor showcase opens at 9am
 - Programming begins at 10am
 - Luncheon begins at 12pm
 - Awards ceremony begins at 12:30pm
 - Show floor closes at 5pm
- **Conference venue:**
 - MTCC, South Building, 800 level, approx. 200,000 sq. ft.
- **Expected registrations:**
 - 2,500 – 3,000
- **Expected number of exhibitors:**
 - 400 – 450
- **Contemplated elements of the conference:**
 - Facilities for media, speakers green room, VIP's and registration
 - Preconference meetings and workshops
 - Opening remarks and keynote address
 - Opening networking reception
 - Seated luncheon
 - Awards ceremony
 - Panel discussions
 - Student and pitch competitions
 - Trade delegations
 - Mentoring sessions
 - Roundtable discussions and training

Discovery will once again integrate speaker and panel sessions within the trade show, with possible modifications (please see attached copy of 2014's agenda and floor plan).

Concurrent programming locations:

Vision Theatre – 150 people

This theatre provides a venue for various topical presentations and panel discussions.

Discovery Theatre – 150 people

This theatre provides a venue for various topical presentations and panel discussions.

Talent Theatre – 100 people

This theatre is host to many of the student and pitch competitions.

NEXT Theatre – 100 people

This theatre provides a venue for various topical presentations and panel discussions.

Innovation Partners Theatre – 40 people

This theatre provides an opportunity for government and organizations serving the innovation community to speak about their individual program offerings.

OCE's Role

OCE will retain primary responsibility for the following roles:

- Conference programming
- Maintenance of conference website (www.ocediscovery.com), and updates on corporate website (www.oce-ontario.org)
- Marketing and communications
- Media relations
- Speaker selection and contracts
- Invitation and confirmation of dignitaries and VIP's
- Negotiation of all supplier contracts

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 a critical path, incorporating OCE and event management responsibilities and deadlines, including MTCC venue and catering requirements
 - Complete management of the work plan logistics for the event
 - Provision of run-sheet and OCE staff orientation guide
 - Work with OCE to create and execute volunteer duty program, meeting and training
 - Attend and participate in OCE planning meetings on a bi-weekly basis throughout planning cycle (frequency will increase to weekly basis in final two months prior to conference)
 - Create meeting agendas with input from OCE and distribute at least two business days prior to meeting
 - Record and distribute minutes of meetings including action items within 24 hours
 - Manage onsite catering, events, meetings and rehearsals, including room preparation, food and beverage, AV, décor, signage and event execution
 - Coordinate all rehearsals, sound and lighting checks
 - Set up and maintain green room, media room, VIP room, staff room with equipment as required, i.e. printers, copiers
 - Ensure first aid and security requirements are fulfilled
 - Provide three hotel recommendations for staff and attendee room block
 - Manage selected hotel(s) room blocks
- **Special Considerations**
 - Address all accessibility, dietary and other requirements
 - Ensure all applicable licenses and appropriate insurance coverage is in place
- **Sourcing and coordinating suppliers**
 - Source and coordinate suppliers as needed that meet OCE's procurement requirements for necessary services outside of pre-contracted suppliers (OCE is subject to the Broader Public Sector Accountability Act, 2010 and the Broader Public Sector Procurement Directive)

- **Speaker and VIP support, including:**
 - Coordinate speaker and panel conference calls
 - Record minutes of speaker and panel conference calls, making notes of all requirements, including AV
 - Coordinate travel, transportation, hotel and onsite activity (green room, rehearsals and events)
 - With OCE, prepare materials for presenters and brief them before event
- **Sponsor support**
 - Together with OCE, solicit and contract sponsors for the conference and establish terms of sponsorship
 - Work with OCE's Finance department to invoice and process payments
 - Ensure that all sponsors and their guests are registered in system
 - Ensure that the terms of sponsorship are executed at the conference, including recognition, complimentary sponsor registrations, etc.
 - Support the sponsor experience to ensure future ongoing relationships
- **Exhibitor support**
 - Communicate all relevant information to registered exhibitors
 - Manage move-in and move-out schedules
 - Work with OCE on floor plan layout and booth number assignments
 - Follow-up as necessary to obtain necessary information including exhibit description, logo(s), company description(s) and attendee information
- **Financial management and reporting**
 - Coordinate supplier contracts (for suppliers who may be required in addition to OCE pre-contracted suppliers) and liaise with other Discovery suppliers to ensure timely and accurate delivery of services
 - Ensure venue and hotel contract terms are fulfilled
 - Registration processing (for attendees, VIPs, speakers, exhibitors)
 - Provision of quotes and pre-approval for anticipated expenses
 - Work with OCE Finance team on process and template for reporting on registration and finances
 - Weekly registration reports from activation of registration system to 4 weeks prior to conference
 - Daily registration reports (on business days) from 4 weeks prior to conference day
 - Prepare final registration reports, and analysis, as well as financial reporting and invoice reconciliation

Registration support

- Work with OCE to register staff, speakers, sponsors and their guests, VIPs and other attendees for Discovery related meetings and workshops
- Manage the OCE room block at selected hotel(s)
- Set-up call centre to respond to inquiries from delegates, exhibitors and sponsors
- Manage onsite registration for attendees, exhibitors and VIPs

- Coordinate and manage onsite delivery of attendee, exhibitor and speaker conference materials, badges, tickets, and parking passes (exhibitors only)
- Working with Show Services company, provide exhibitor desk and support for booth set up, and onsite requirements

On-line registration system - please provide separate quote, independent of event management and logistic services

- Recommend supplier(s) to provide registration services linked to the Discovery website (www.ocediscovery.com) for selection and approval by OCE
 - System must provide accurate, real-time, self-serve reporting capabilities
 - Reports must include:
 - Revenue to date
 - Attendee breakdown
 - Exhibitor list
 - Sponsor list
 - Sortable by sector
 - Other categories to be discussed
- Manage the online registration system and the relationship with the supplier including:
 - Timely mail outs to supplied contact list, as requested, and on-going management of distribution list
 - Payment processing and reporting capability for delegates and exhibitors, with the ability to offer discounts
 - Supply logistical information through the registration system, including move-in/move-out, maps, fulfillment of booth requirements

Note: this service contract may be awarded separately. If it is, you will be required to learn the new system.

Proposal Format

- Provide an overview including agency background, organizational chart, key personnel biographies, account services structure, company size, current clients with length of service (identify potential conflicts of interest), core competencies and any relevant experience, including one or two case studies.
- Address the requirements as outlined above and provide:
 - Performance standards
 - How the experience and skills of key personnel will allow your firm to deliver the requirements, performance standards and meet key deadlines,
 - Your experience working with other registration systems (other than what you have recommended)
 - Provide a high-level project plan. The final project plan will be worked out with OCE staff and amended as required

- On-line registration system – describe your recommendation, your experience with it, and provide pricing
- Change management process – describe the process you follow to ensure that any changes to scope or services is properly incorporated into the event

Please note that all requested information must be included or your proposal may not be considered in the evaluation or may result in a low score.

Your proposal should include an estimate for all event management services listed (excluding registration system). A second estimate should be provided for online registration system, as this service may be awarded separately.

- **Agency References**
 - Provide three (3) client references for which your agency has done similar work
 - References to include contact, company name, email address and telephone number
 - The Agency grants Ontario Centres of Excellence permission to contact submitted references
- **Pricing & Payment Terms**
 - Indicate discount for multi-year contract
 - Indicate discount allowed for prompt payment and period within which invoice must be paid to qualify
 - Proposed remuneration structure and payment terms
 - Outline any potential additional costs/ mark-ups
 - Prices to be quoted in Canadian dollars and inclusive of all costs (do not include HST)

OCE Evaluation

- RFP submissions will be evaluated by OCE, using the following criteria:
 - Experience, expertise, qualifications and capability to carry out work described in **Event Management Role (40%)**
 - Price; Payment and Pricing Terms **(30%)**
 - Change management process **(20%)**
 - Presentation of Proposal and References **(10%)**
- Select organizations will be requested to present to the OCE planning committee and will be asked to provide five (5) copies of their formal presentation.

Submit proposals	4:00 p.m. Monday July 21, 2014
Invitations to present	Week of July 28 th , 2014
Presentations	Weeks of August 11 th , 2014
OCE advises agencies on decision	By end of August

Subsequent Contract Terms and Conditions

- Ontario Centres of Excellence (OCE) reserves the right to award all, partial or none of this solicitation
- This RFP does not create an employment relationship. Individuals performing services required by the contract are not employees of OCE. Vendor's employees shall not be considered employees of Ontario Centres of Excellence and as such shall not be eligible for benefits accruing to OCE employees
- Any changes to scope of services and associated costs following execution of contract must be submitted in writing and are subject to approval by OCE
- Travel and travel reimbursement is not authorized for this acquisition
- The vendor shall be paid upon submission of proper invoices to OCE at the prices stipulated on the contract
- Invoices shall contain the contract number and reference number. Failure to follow these instructions may result in delay of processing invoices for payment

Response Deadline/Schedule

- Responses are required by **4:00 p.m., Monday July 21, 2014** by e-mail and in hard-copy to:

Peter McFadzean
Manager, Events and Sponsorship
Ontario Centres of Excellence
156 Front Street West, Suite 200
Toronto, Ontario, M5J 2L6

Email: peter.mcfadzean@oce-ontario.org

- All bids will be acknowledged with a return receipt. If you do not receive acknowledgement of your submission, please email Peter McFadzean to confirm receipt.

Proposal Retention

Proposals submitted in response to this RFP will not be returned. It is the understanding that the contents of the proposals are the property of the agency and will not be utilized in any marketing efforts unless the agency enters into a written agreement with Ontario Centres of Excellence.

Questions / Clarifications

Questions may be addressed via email to Catharine Ogilvie, Marketing Advisor, Ontario Centres of Excellence. Responses may or may not be shared with all potential bidders or posted on the OCE website.

Email: catharine.ogilvie@oce-ontario.org.

DISCOVERY 2014 DRAFT AGENDA

Confidential

Floor Plan 2014

