

Request for Proposal

Contact Information

Event Name

UM Tax Seminar

Event Host

University of Michigan – Conference and Event Services

Event Organizer

Jessica Weirauch

Onsite Contact Person

TBD

Job Title

Conference Manager and Interim Assistant Director of Sales

Mailing Address

1320 Hubbard Road, 2110 Eaton House
Ann Arbor, MI 48109

Phone Number

734-647-8447

Email Address

louttitj@umich.edu

Event Website

<http://www.housing.umich.edu/conferences/um-tax>

Preferred Method of Communication

Phone or Email

Event Profile

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Event Date

November 3rd, 2016 and November 4th, 2016

Alternate Event Date

November 9th, 10th or 11th, 2016

Event Objective

The UM Tax Seminar is a yearly two day meeting for Financial Industry tax preparers to learn the latest updates to tax laws and changes to prepare for the upcoming income tax season. Attendees can be non-certified professionals or carry the CPA, CFP or EA certifications. Attendees earn 16 CEU hours which the certified professionals need each year to keep their certification.

Attendee Profile

Expected Attendance

80

Attendee Demographics

Attendees will be drive in attendees that live within a 75 mile radius of the Flint area. We expect guests from previous years that attended the Bay City location and Flint locations to return to this location. Many attendees have been attending our Tax Seminars for up to 20 years and return every year.

Event History

Facility Name	City	Start Date	End Date	Total Attendance
Double Tree by Hilton Hotel Bay City	Bay City	Nov. 5, 2015	Nov. 6, 2015	56
Double Tree by Hilton Hotel Bay City	Bay City	Nov. 12, 2014	Nov. 13, 2014	62
Holiday Inn Gateway Center	Flint	Nov. 4, 2013	Nov. 5, 2013	81
Flint Gateway Center	Flint	Nov. 1, 2012	Nov. 2, 2012	76

Meeting Space and Setup Requirements

Meeting Room

- Classroom style set up for 80 (2 chairs/ 6' table)
- Speakers table
- Standing Lectern
- Barstool
- Coat Rack
- If we are supplying our own projector(s) we will need 2 tables

Lunch Room

- Banquet Rounds set up for 80

Registration (outside meeting room)

- 2 – 6' clothed and skirted table, 2 chairs, wastebasket and ice water service
- 1 – easel

AV Requirements

- Wireless lavalier Microphone
- Projector screen (If the projector built in we will use it, but if not we will bring our own)
- Polycom Conference Phone
- Wired Internet

Food and Beverage Requirements

Budget

\$35 - \$40/person/day including gratuity and service charges

The University of Michigan is a tax exempt organization

Food and Beverage Needs

- All day beverage service
- Morning Break Service with beverage refresh and snacks
- Afternoon Break Service with beverage refresh and sweets
- Ice water service inside meeting room at guest tables and speakers table
- 1st day Breakfast: Continental
- 1st day Lunch: Cold lunch options
- 2nd day Breakfast: Continental (Varied from 1st day if possible)
- 2nd day Lunch: Plated lunch

Additional Requirements

- Free guest parking
- Ability to accept and store shipment of materials 1-3 days prior to meeting
- Ability to deliver materials to meeting room for setup

Event Schedule

Setup Date

If available we prefer to setup the main meeting room the night before the meeting would begin to ensure we are ready for guest to arrive early on day 1.

Day 1

6:00 am – 7:30 am	Client Set Up
7:00 am – 5:00 pm	Registration
7:30 am – 9:30 am	Continental Breakfast
8:00 am – 9:30 am	Session
9:30 am – 9:40 am	A.M. Break
9:40am – 12:00pm	Session
12:00pm – 1:00pm	Lunch
1:00pm – 2:15pm	Session
2:15 pm – 2:30 pm	P.M. Break
2:30pm – 5:00pm	Session

Day 2

6:30 am – 7:30 am	Client Set Up
7:00 am – 9:00 am	Continental Breakfast
7:00 am – 5:00 pm	Registration
8:00 am – 9:00 am	Session
9:00 am – 9:10 am	A.M. Break
9:10am – 11:30am	Session
11:30pm – 12:15pm	Lunch
12:15pm – 2:00pm	Session

2:00 pm – 2:15 pm P.M Break
2:15pm – 4:30pm Session

Proposal Specifications

For a proposal to be considered it must include the following:

- Facility Name
- Facility Contact Person
- Response to Requirements
 - Outlined Meeting Space
 - AV
 - Food and beverage options within budget
 - Parking

Proposal Due Date and Time

Friday, May 27th, 12:00pm

Decision Date

Friday, June 10th

Decision Makers

Jessica Weirauch, Conference Manager and Interim Assistant Director of Sales

Laura Imbirowicz, Assistant Director Full Service Conference and Summer Operations

Decision Notification

Phone or email

Decision Factors

- Meeting room cost
- Food and beverage cost
- Dates available
- Services offered