

Event Planner Request for Proposal (RFP)

National Association of Community Health Workers (NACHW) Annual Meeting and Unity Conference 2025

NACHW seeks a qualified and experienced major event planner to manage the execution of our annual meeting and Unity conference, held in 2025. The Event Planner's services include planning, event production, overall event management coordination, day-of-event coordination, post-event analysis, budget management, programming, and implementation.

ABOUT THE EVENT

Proposed dates (2025): July 23-25 **OR** July 30-August 1 **OR** August 6-8

Event duration: 3 days

Event name: NACHW Annual Meeting and Unity Conference

Attendee Count: 1,400-1,600 anticipated in person attendees. 300-500 virtual.

Type of event: Conference, exhibition, and gala

Format: In person AND virtual. Day 1 of the conference is a business meeting set in a large ballroom. Attendees will hear from speakers and participate in a vote for incoming board members. We plan to stream the annual business meeting, plenary sessions, and a handful of workshops.

Event topic: The NACHW Annual Members Meeting and Unity Conference is an industry-leading 3-day interactive, educational, and informative gathering that convenes Community Health Workers (Including Promotores/as, Community Health Representatives (CHRs), and other community-based health workers), allies, members, and partners from across the country to celebrate the workforce. This event is centered around an annual theme. Attendees are invited to engage in workshops, training sessions, and social gatherings. We host an exhibitor hall for sponsors and vendors, and a celebratory gala along with a dance. Members of NACHW vote for new board members, and awards are presented for CHWs (at the gala) who have gone above and beyond in their communities. Learn more about previous conferences at www.nachwunity.org

Event history: Due to the COVID-19 pandemic, this annual event was hosted virtually by NACHW from 2020 until 2022. In 2023, NACHW hosted the Unity Conference for the

first time as an in-person event in Austin, TX. This 3-day conference welcomed over 1,200 attendees from all 50 states, over 300 virtual attendees. Unity 2023 had 12 training sessions, over 35 poster sessions, more than 50 different workshops, over 60 booths with local vendors and sponsors, and more than 120 speakers and co-presenters. Our 2023 conference left our attendees, and our sponsors excited about the next in-person conference. Our 2024 conference was held virtually, and we are excited to convene again in 2025.

SCOPE OF WORK

The Event Planner will be expected to provide all services necessary and appropriate to manage and run an Annual Members meeting and Unity conference, including the services detailed in this document.

The selected Event Planner will be expected to demonstrate in their proposal, among other needed skills, organized, detail-oriented, flexible, an effective verbal and written communicator, calm under pressure, and a negotiator in the best interest of NACHW as we host our Annual Members Meeting and Unity Conference.

The selected Event Planner will report directly to the Associate Director of Communications and manage the activities with NACHW planning committee.

All budgetary, legal and contractual decisions necessary to complete the work of the Event Consultant on behalf of the Annual Members Meeting and Unity Conference will be approved by the Executive Director.

NACHW is a fiscally sponsored program of Health Resources in Action, Inc a Boston-based nonprofit organization. NACHW follows all generally accepted accounting and contracting procedures and policies of HRiA. Once selected, the event planner will receive a contract for execution from HRiA on behalf of NACHW for these services.

EVENT PLANNER PRIMARY FUNCTIONS

Event Management:

- Work closely with the planning committee and staff to determine the overall look and theme of the event and ensure effective internal communications and a collaborative and cooperative process.
- Provide support in finalizing event plans, budgets, timelines, and deployment schedule and oversee the execution of all related tasks.
- Identify potential challenges and recommend solutions.
- Serve as liaison with vendors, venues, sponsors, and other event stakeholders
- Ensure the event complies with applicable laws and regulations.
- Ensure all authorized agents and/or staff of Event Planner are qualified to perform services in accordance with the best industry standards (Event Planner will not subcontract any tasks to third parties without NACHW's prior written consent).

- Exercise the duty of loyalty and good faith in favor of NACHW when negotiating with third parties (Event Planner will present all contracts to NACHW for final approval).

Deliverables:

- Develop and update a detailed project plan with estimated delivery dates and an agreed-upon budget, which details anticipated tasks and required expenses.
- Collaborate to maintain a budget spreadsheet of vendor costs.
- Manage all approved vendor relationships, ensure vendor deliverables are delivered on time, and maintain a vendor list as vendors are confirmed.
- Manage submission of all invoices to ensure payments can be made on time.
- Meet and act as the primary point of contact for related vendors, including but not limited to the following:
 - Food & beverage
 - Production, to include the following:
 - Audio and Visual.
 - Lighting.
 - Set design and fabrication.
 - Décor.
- Branding and design to include the following:
 - Support printing processes alongside the Marketing and Communications team
- Liaise with security details as needed.
- Provide support in managing and distributing a complete production schedule for the entire event, including load-in, setup, rehearsals.
- Support the creation of day-of logistics and days leading up to the event.
- Provided general administration, management, day-of execution, and managed on-site event registration.
- Help recruit, train, and supervise all staff and volunteers at the event.
- Work with the planning committee to ensure all VIP guests, dignitaries, and sponsors are seated appropriately at the event.
- Ensure all required insurance certificates are obtained.
- Participate in client meetings or any additional meetings and/or calls as needed or reasonably requested by NACHW, including scheduling and walk-throughs.
- Submit a post-event evaluation report with recommendations.
- Provide participant, vendor, and sponsor evaluations and thank you letters.
- Other duties as assigned.

On-Site Management:

- Oversee the registration process.
- Oversee setup and strike of equipment, furniture rentals, AV, staging, room setups, signage, sponsor's space, registration, gift bags, and other related line items.
- Provide support to manage volunteers and staff.
- Schedule, manage, and supervise all rehearsals, video test runs, complete program rehearsals, performance rehearsals, etc.

ABOUT NACHW

The National Association of Community Health Workers (NACHW) was founded in April 2019 after several years of planning and organizing by Community Health Workers (CHWs) and allies across the United States. NACHW is a **501(c)(3) nonprofit** membership-driven organization with a mission to unify CHWs across geography, ethnicity, sector, and experience to support communities to achieve health, equity and social justice.

Since its inception, NACHW has grown to over 2,200 active members across all 50 states, U.S. territories, and Indigenous U.S. tribes. Along with our members, NACHW has a growing community of allies and partner organizations. Learn more at www.nachw.org

PROPOSAL SUBMISSION INFORMATION

Proposal should be submitted as **Word Documents**. Please use 1-inch margins and 12-point Times New Roman font. Please submit no more than 15 pages. Please ensure that your proposal includes the following components:

- Org name, lead/authorized contact name, email address and accessible phone number. Please include the full social media profile links and website links
- List each jurisdiction where the Event Planner has been incorporated and is qualified to do business.
- Names and roles of each person who will be on the planning team.
- Fees: provide a project-based fixed fee, including a description of all costs anticipated to be charged to NACHW (**Place budget categories and budget items WITH budget justification using the example below**)
 - BUDGET CANNOT EXCEED \$100,000.00
- References: at least 2 events similar in scope to NACHW's event. References should include a description of the events and contact information of the primary contact you worked with.
- Samples of previous work:
 - These MUST include at least ONE event workplan and summary report with details on the location, number of attendees and overall event budget, and at least ONE of the following: promotional communications toolkit, event prospectus, event photos, etc.
- A summary description of your approach to lead, manage and collaborate with NACHW to meet the following critical NACHW dues dates/timeline for the 2025 Annual Meeting and Unity conference.
 - Mid November 2024: Event Consultant Kick off meeting with NACHW
 - Dec 2024: Save the Date Release
 - Feb 2025: Call for Speakers Release and Event Coordinator Event Site Visit
 - April 2025: Event Agenda Announcement

Sample Budget Table:

Budget Item	Total Budget Amount	Budget Justification
Staff 1 (Title)	\$10,000	\$100 per hour x 10 hrs. per week x 10 months (Nov 2024 to Aug 2025)

PROPOSAL DUE DATE: All proposal must be received via email by 11:59pm EST on October 26, 2024; Email proposals to Bernadine Jeranyama using the email address below.

If you have any clarification questions, please email:

Bernadine Jeranyama
 Associate Director of Communications
 National Association of Community Health Workers
 email: bjeryama@hria.org

NOTE: CONFIDENTIALITY CLAUSE

Any information disclosed by NACHW herein (and any related correspondence and/or attachments) is considered confidential and constitutes the proprietary information of NACHW. All submissions will become the property of NACHW and will be treated as confidential between NACHW and the Event Planner. NACHW will use their commercially reasonable efforts not to disclose the contents of the Event Planner’s proposal to other participants or the public. NACHW reserves the right to discuss the submissions with their consultants, references provided by the Event Planner, and other related parties during the evaluation process.

Bidders responding to this Request for Proposal must include the following as part of the submission of their proposals:

- Disclose any close, family, or financial relationship with NACHW or project staff and board members.
- Disclose any family or financial relationships with other bidders submitting proposals.
- Certify that the prices of the offer were determined independently, without consultation, communication or agreement with any other bidder or competitor to restrict competition.

- Certify that all information presented in the proposal and all supporting documentation are authentic and accurate.