

Piano Technicians Guild
Regional Conference Organization (RCO)

**Conference and Convention
Request for Proposal (RFP)**

By Steve Taylor
8/05/2011

This document provides an example of a **Request for Proposal** that is most often referred to as simply an **RFP**. The next 6 pages is the actual RFP submitted for the PTG MARC in 2011 for the 2013 event along with detailed notes of important areas. Corresponding footnotes will be designated by a red circled number.

A proper RFP can be long and detailed but its importance cannot be overstated. It is the primary 'introduction' to appropriate facilities and hotels. It saves an incredible amount of time in verbal explanations along with an impressive professional presentation (believe me, it does matter). An added bonus is that the time spent on a proper RFP also serves as the foundation in planning your entire event.

Once completed, the submission of an RFP becomes very simple. In the case of this RFP, it was sent (via email or website) to the known preferred hotels in the area and then followed up by contacting the respective sales departments. It was also submitted to the areas very active Convention and Visitors bureau, who in turn 'broadcast' the RFP to every hotel and conference facility (over 100). In addition, it was also submitted to two other nearby active Convention and Visitors bureau's who also 'broadcast' the proposal. Remember two most important thoughts ... "Always keep an open mind" (especially outside your preferred site and/or chosen area) and "Competition Is Your Friend!"

This RFP example and any updates will be posted in the RCO Community on my.ptg.org. For any questions, thoughts and/or additional downloads please use the Discussion and Library features of the RCO Community.

Note: We were recently asked by a national conference center organization for permission to use this RFP as an example of how it should be done (minus the concessions, of course).



① Convention/Conference Meeting RFP - Spring 2013

I. Contact Information

② Event Name: **PTG MARC** (Piano Technicians Guild, Mid-Atlantic Regional Convention)

③ Event Host Organization: **ProPTA** (Professional Piano Technicians Association)

④ Key Contact Person: **Steve Taylor**

Job Title: **Executive Director**

Mailing and Billing Address: **4905 Davis Drive**

Mailing and Billing City: **Doylestown**

Mailing and Billing State: **PA**

Mailing and Billing Zip Code: **18902-1147**

Business and Mobile Phone: **215-534-0533**

Fax: **206-984-2129**

E-mail Address: **staylor@ptgmarc.org** (staylor@propta.net)

Web Address: **www.ptgmarc.org**

Preferred Method of Communication: **(1) Email (2) Telephone**

Contact Information Comments: The host organizer permanent business email is staylor@propta.net. Please use staylor@ptgmarc.org for this events communication (note: this website/email may be turned off temporarily at the conclusion of the event and completed billing/payment).

II. Event Profile

Event Name: **PTG MARC**

Event Host Organization: **ProPTA**

⑤ Preferred Start Date: **Thursday, April 25, 2013** (Initial setup, Wednesday, April 24)

Preferred End Date: **Sunday, April 28, 2013** (Final move-out, Monday, April 29)

Alternate 1 Start Date: **Thursday, April 18, 2013** (Initial setup, Wednesday, April 17)

Alternate 1 End Date: **Sunday, April 21, 2013** (Final move-out, Monday, April 22)

Alternate 2 Start Date: **Thursday, April 4, 2013** (Initial setup, Wednesday, April 3)

Alternate 2 End Date: **Sunday, April 7, 2013** (Final move-out, Monday, April 8)

Alternate 3 Start Date: **Thursday, May 2, 2013** (Initial setup, Wednesday, May 1)

Alternate 3 End Date: **Sunday, May 5, 2013** (Final move-out, Monday, May 6)

Event Market Segment: **Association (Regional, State or Local)**

Event Type: **Conference**

Event Overview: **Education and Networking for Piano Service Professionals** (e.g. Tuning, Repair, Rebuilding, Business).

Attendee Profile

⑥ Expected Total Event Attendance: **275 - 375**

Attendee Demographics Profile: **Regional / Overnight 60% / Commuter 40%**

Event Profile Comments: **Although promoted as a regional, our events have become popular and attract national and international attendees.**





⑦ Event History

Year	Event	Facility	Location	Start Date	End Date	Attendance	Room Nights
2011	PTG MARC	Historic Hotel Bethlehem	Bethlehem, PA	Thursday, April 28	Sunday, May 1	305	367* * Sold Out
2010	PTG MusicCity	Radisson Opryland	Nashville, TN	Thursday, April 8	Sunday, April 11	183	282
2009	PTG MARC	Sheraton Hotel	Harrisburg-Hershey, PA	Thursday, April 23	Sunday, April 26	306	471
2007	PTG MARC	The Inn at Valley Forge	King of Prussia, PA	Thursday, April 19	Sunday, April 22	366	519
2005	PTG MARC	Radisson Hotel	Bethlehem, PA	Thursday, April 7	Sunday, April 10	293	353* * Sold Out
2004	PTG MARC	Wyndham Hotel	Harrisburg-Hershey, PA	Thursday, March 25	Sunday, March 28	280	381
2003	PTG MARC	Radisson Green Tree	Pittsburgh, PA	Thursday, April 3	Sunday, April 6	310	507
2002	PTG MARC	Hilton Valley Forge	King of Prussia, PA	Thursday, April 4	Sunday, April 7	314	440
2001	PTG MARC	Marriott Hotel	Harrisburg-Hershey, PA	Thursday, March 29	Sunday, April 1	267	401
2000	PTG PA State Convention	Hilton Hotel	Allentown, PA	Thursday, March 23	Sunday, March 26	157	219

Event History Notes: PTG MARC (Piano Technicians Guild, Mid-Atlantic Regional Convention) was first introduced in 2001 as an outgrowth of the PTG Pennsylvania State Convention. The 2010 PTG MusicCity was our first venture outside the Northeast.

Exhibition Information

This event includes an exhibition.

Type of Exhibition: **Private**

Type of Exhibits: **Booth - Portable** (Many table top)

Number of Exhibit Booths Expected: **40+**

Number of Exhibiting Companies Expected: **30+**

Exhibitor Demographics Profile: **National and International Piano Service Tools and Products, Piano Manufacturers.**

Secured Exhibition Area: **Preferred but not required.**

⑧ Gross Space Required: **5,000+ sq. ft.** (we often utilize foyer/atrium areas along with enclosed exhibit space).

Exhibitor Kit Provided to Exhibitors: **Printed and Online.**

⑨ General Service Contractor: **ProPTA**





III. Requirements

Statement of Need

We will require 10 classroom style breakout rooms of various sizes starting with seating for 8/12 (boardroom ok), most between 18/24 (downsizing larger rooms is fine) and up to 36/48 along with rooms for exhibitions and sit-down meals (Thursday lunch, Thursday dinner, Saturday banquet, Sunday brunch) for 120 - 200.

Location Requirements

Location: **King of Prussia, Pa preferred; Greater Philadelphia alternate.**

Other Location Requirements: **Within 30 miles of a major airport.**

Date Requirements

Listed under Section II. Event Profile (Page 1)

Facility Requirements

Preferred Facility Type: **Hotel with banquet and conference rooms.**

Guest Rooms

- Total Room Nights: **350 - 500**
- Peak Night Room Block: **100 - 150**

Largest Function Space

- Minimum Square Footage: **Seating for 120 - 200**
- Set-up Type Required: **Banquet**

Exhibit Hall

- Gross Space Required: **5,000+ sq. ft.** (we often utilize foyer/atrium areas along with enclosed exhibit space).

Breakout Rooms

- Minimum Number Required Simultaneously: **9/10**

⑩ Guest Room Block Requirements

Desired Guest Room Rates: **\$89 - \$119**

Minimum	Tuesday	Wednesday	Thursday	Friday	Saturday
Rooms	5	50	100	100	75

Convention/Conference Director Suites: **2**

Reduced Staff Room Rates Required: **8**

Method of Reservations: **Individual Reservation** with the exception of staff and non-sponsored instructors which will be provided by the organizer for the master account.

Other Guest Room Block Requirements: **Group rate deadline to be on the third Monday prior to the first day of the event. Group rate to continue after the deadline until guest rooms are sold out.**

Comments: **As our history shows, the above block is very low and has always been exceeded. Require a conservative contract block to be prepared for any economic downturns.**





⑪ Function Space and Food & Beverage Requirements

Wednesday	Function Type	Function Name	Times	Setup	Other
	4/5 Breakout/ Classrooms	Thursday Seminar Setup	Afternoon/Early Evening	Room access	Piano & Exhibit Delivery

Thursday	Function Type	Function Name	Times	Setup	Other
	Break	Continental Breakfast	7 am - 8 am	Foyer/Atrium or similar area	Breakfast breads Coffee/Juice
	4/5 Breakout/ Classrooms	All-day Seminars	8 am - 5 pm	Classroom	See Section III. Requirements
	Exhibit Area and 5/6 Classrooms	Friday - Sunday Setup	8 am - 6 pm	Room access	Piano & Exhibit Delivery
	Break	Morning Break	9:30 am - 10:15 am	Foyer/Atrium or similar area	Coffee/Punch Snacks
	Lunch	Seminar Lunch	11:45 am - 12:45 pm	Rounds 120 - 150	Deli Buffet or Similar
	Break	Afternoon Break	2:45 pm - 3:30 pm	Foyer/Atrium or similar area	Coffee/Punch Snacks
	Dinner	Welcome Reception	6:30 pm - 8:00 pm	Rounds 140 - 160	Informal Meal & Entertainment

Friday	Function Type	Function Name	Times	Setup	Other
	Break	Continental Breakfast	7 am - 8 am	Foyer/Atrium or similar area	Breakfast breads Coffee/Juice
	10 Breakout/ Classrooms	Technical Institute	8 am - 5 pm	Classroom	See Section III. Requirements
	Exhibit Area	Exhibit Hall	9 am - 6 pm	8' x 10' Exhibits	See Section III. Requirements
	Break	MARC Café Morning Break	9:30 am - 10:15 am	Exhibit Hall	Coffee/Punch Snacks
	Lunch	MARC Café Lunch	11:45 am - 12:45 pm	Exhibit Hall	Wrap Sandwich or Similar
	Break	MARC Café Afternoon Break	2:45 pm - 3:30 pm	Exhibit Hall	Coffee/Punch Snacks
	Reception	'After Dinner Mint'	7:00 pm - 9:00 pm	Foyer/Atrium or similar area	Informal Dessert and Coffee





Professional Piano Technicians Association

Function Space and Food & Beverage Requirements (continued)

Saturday	Function Type	Function Name	Times	Setup	Other
	Break	Continental Breakfast	7 am - 8 am	Foyer/Atrium or similar area	Breakfast breads Coffee/Juice
	10 Breakout/ Classrooms	Technical Institute	8 am - 5 pm	Classroom	See Section III. Requirements
	Exhibit Area	Exhibit Hall	9 am - 4 pm	8' x 10' Exhibits	See Section III. Requirements
	Break	MARC Café Morning Break	9:30 am - 10:15 am	Exhibit Hall	Coffee/Punch Snacks
	Lunch	MARC Café Lunch	11:45 am - 12:45 pm	Exhibit Hall	Wrap Sandwich or Similar
	Break	MARC Café Afternoon Break	2:45 pm - 3:30 pm	Exhibit Hall	Coffee/Punch Snacks
	Dinner	PTG MARC Banquet	6:00 pm - 8:30 pm	Rounds 160 - 200	Formal Dinner & Entertainment

Sunday	Function Type	Function Name	Times	Setup	Other
	Break	Beverage Station	6:45 am - 8 am	Foyer/Atrium or similar area	Coffee/Juice
	Breakout	Chapel Service	7 am - 8 am	Theater (Classroom ok)	25 - 40
	10 Breakout/ Classrooms	Technical Institute	8 am - 11:15 am	Classroom	See Section III. Requirements
	Brunch	Closing Rally	11:15 am - 12:15 pm	Rounds 140 - 160	Breakfast Buffet plus add-ons
	All Function Space	Begin Teardown	1:00 pm - 4:00 pm	Room Access	Classroom A/V, Equip. & Exhibits

Monday	Function Type	Function Name	Times	Setup	Other
	Function Space	Finish Teardown	Before Noon	Room access	Piano Pickup & Exhibit Shipping

12 Note: **24-Hour Hold on all exhibit and breakout rooms** once equipment and/or pianos are setup (will move equipment and pianos when needed for other scheduled hotel events but would prefer to keep it to the bare minimum).

Overall Food & Beverage Budget: **\$15,000 minimum - \$30,000++ maximum** (based on attendance).





13 Concessions Desired

General:

- Complimentary high speed internet, wired or Wi-Fi, in all guest rooms and classroom/exhibit space.
- Complimentary parking for hotel guests and commuting attendees.
- Group rate to continue after the contracted deadline until guest rooms are sold out.

Guest Rooms:

- 1 complimentary room night for every 40 paid.
- Late check-out Sunday at 1:00 pm (convention ends at 12:15 pm)
- Convention Directors Suites (Tuesday - Monday).
- Discounted Staff Rooms.
- Group rate 3 days before and after room block (based on availability).

Food & Beverage:

- Discounts on published 2011 Food and Beverage menus.

Function Space:

- No function/exhibit space and/or breakout/classroom charges with a \$15,000 F & B minimum (Due to our heavy F & B requirements, the minimum has always been significantly exceeded. Require a conservative minimum to be prepared for any economic downturns.)
- Complimentary draped 6'8' tables (45+) for vendor booths in exhibit areas.
- Complimentary electric access for vendor booths; no heavy loads, minimal usage (e.g. light bulb, laptop).

IV. Proposal Specifications

The RFP issuer expects that all work will be performed in a professional manner. All information provided in this RFP is proprietary for this purpose only. Information cannot be released without written permission from the contact person named in Section I.

Questions:

Direct all questions and requests for additional information regarding this RFP to the contact person designated in Section I (Contact Information).

Decision Making Process:

Final Decision Maker is Steve Taylor, Executive Director

Timeline:

- Proposal Due Date and Time: ASAP
- Proposal Cut Date: June 3, 2011
- Decision Date: By June 17, 2011



NOTES

1. Conference facilities and hotels are most often part of a corporate identity, using a professional letterhead is good business. If an RCO/Chapter letterhead is not available, it should be easy enough to create one.
2. Using abbreviated titles as the name of the event and host organization is much easier and acceptable but also state the complete titles in parenthesis, at least once in the RFP and potential contracts. Spelling out the complete title makes it much clearer right up front exactly who the event is for, from, and the area represented.
3. The Host Organization should be the entity that has primary responsibility for the operations, financing (e.g. profit/loss) and liability (e.g. insured). For the MARC, it is sponsored by an RCO (Pennsylvania State Conference) who commissioned ProPTA to organize and operate the event including taking full responsibility for the risk and liability. Only list the host that is the responsible party, listing anyone else causes unneeded confusion and questioning who is actually in charge. Many RCO's may have the same event name and host organization. Some RCO's are only advisory and a chapter is the responsible party, in which case the event name may be the RCO but the chapter(s) would be listed as the host.
4. The suitability of an event matching the facilities is only one area that is of concern to a potential location. The sales staff is also evaluating you and/or your groups ability to properly execute and operate the event. It is common that many groups planning an event or led by amateurs (non event planners), facilities/hotels understand and expect this reality. They often need to expend additional resources and manpower to assist in helping an event run smoothly. It does make a difference when in the negotiation stages, especially as it relates to costs and/or desired concessions, to make a good impression of solid planning and leadership. The Contact and Title should be the person who is the primary operator and negotiator for the event. In lieu of one person, make sure the 'negotiator' is a key figure within the group who has the ability and authority to work on the contract details, negotiating by committee is not viewed as a positive. On a side note, the title 'Executive Director' was used in this RFP to portray a non-profit entity vs. a commercial company, obviously most groups will use a title such as Convention or Conference Director.
5. List at least 2 up to 4 date ranges, in order of preference. It is quite common that a facility may already have an event scheduled or a major area event is precipitating premium rates vs. alternate dates. If it appears that a facility is not receptive to negotiating a contract outside of the 'published' rates and fees, asking if another date would make a difference is a good option.
6. Provide an estimated range for attendance that is realistic. Avoid over-optimistic estimates especially since contracts may be based on this number (and the tendency is to use the higher number). Keep in mind that event facilities, especially hotels, will hold you financially responsible for contracted minimums.

7. When available, event history is very valuable especially if it is consistent. Just as important as with estimated attendance, keep this information accurate for a realistic view of future potential. In the case of this RFP, if there were conflicting numbers for any given year, the lowest number was used. This is the area that really gets the attention of potential facilities, there is nothing more enticing to a sales department than an event with a history of solid figures (not how high but a history of relative consistency).
8. Secure facilities (e.g. enclosed ballroom) are obviously the most advantageous but often is not available especially with the need to have a large area for our food events as well as an exhibit area. Using a foyer/atrium in conjunction with available enclosed space works very well when utilized properly.
9. We serve as our own on-site exhibit management. Even with our larger size it has not been an issue. As part of our concessions we require 'no charge' for use of exhibit space, draped tables, electric and Wi-Fi. The only item that needs to be rented is 'pipe and drape' and quite often we do not use 'in-house' A/V departments which can be more costly. We also arrive at the facility days before the event and remain until the day after to ensure that all equipment and supplies are securely handled 24/7 whether that be for instructors, vendors, manufacturers or dealers.
10. Negotiate for the lowest room rate including searching the internet to check for lower rates, use this info in your discussions. Regardless, have a statement added to a contract protecting against the hotel offering a lower rate elsewhere. Outside of this, it is generally not in your best interest to make the rate a 'deal breaker'. I have found from experience that forcing a very low rate makes the hotel hold to the letter of the contract especially as the room block/rate is concerned. It is more important to get the concessions elsewhere as well as have the hotel extend the room rate beyond the contracted deadline which in essence makes the deadline meaningless (except for selling out outside the group, which has never been a problem). Along with extending the room rate beyond the deadline and because of our strong history, we have no problem contracting for a low room block protecting us financially.
11. The Function Space and F&B Requirements section may seem like overkill but it lays out exactly the needs of your event and saves an incredible amount of time explaining the specific needs. Just as important, this serves as the primary foundation in planning the facility needs and layout of your event.
12. Our ultimate goal is never having to move pianos and large equipment for the entire weekend once they have been delivered. We have never reached that goal but have come close at times with only a few moves the entire event. Assign pianos to rooms and then match instructors based on their needs. It takes creative planning but can be done effectively as well as asking exhibitors/dealers supplying pianos if they can bring extra to cover classroom needs.
13. The concessions asked in this RFP may appear extensive but it actually may go even further (don't want to scare potential facilities up front). For example, Food & Beverage is just the 'tip of the iceberg'. It is listed to introduce our intent to ask for a discount not the extent. We may go in many different directions depending on a facilities published menu and willingness to customize. It may be having a set price based on volume (consumable) vs. menu discount per person and many times it is a combination of these options. Make sure to be basing costs on present menus or customizations, not a discount on an unknown future menu.