



OMICRON DELTA KAPPA

The National Leadership Honor Society

2020 and 2021 OΔK National Leadership Conference Request for Proposal

The task of hosting an Omicron Delta Kappa (OΔK) conference is a rewarding process for both professionals and institutions selected to host. National conferences are our longest-standing tradition with the first held in 1920 in Baltimore, Md. Beginning in 2020, OΔK will move from a biennial convention to an annual national leadership conference. The national leadership conference is the signature event of OΔK.

The National Leadership Conference has three goals:

1. to support personal leadership development in students and faculty;
2. to support students and circle officers in building stronger circles;
3. to provide networking among members and a unique collaborative experience between members of all ages and of all phases.
- 4.

For the Host Institution(s) and Host Circle(s), the experience of hosting a national conference is an opportunity to share your facilities, best practices, and campus culture with your OΔK colleagues. It can also be a professional development opportunity for collegiate members and staff.

OΔK encourages proposals from institutions wanting to host the conference on their own campus. Proposals are also welcome from two or more member institutions that wish to host the conference jointly.

GENERAL INFORMATION

The Omicron Delta Kappa Society, Inc. seeks proposals to host the National Leadership Conference (NLC) in either summer 2020 or summer 2021. A single proposal may be used to propose to host the NLC in either year but specific financial data for each year will be required to account for potential inflationary factors between the years. The Conference Planning Team and the Omicron Delta Kappa National Headquarters staff are responsible for the planning and implementation of the National Leadership Conference. The Host Team and Host Team Leader will serve as part of the Conference Planning Team.

TERMINOLOGY

- **National Leadership Conference (NLC):** The NLC is the annual gathering of the membership of Omicron Delta Kappa.
- **Conference Planning Team (CPT):** The CPT responsible for planning and implementing all aspects of each NLC). The CPT is lead by the CPT Leader.
- **Host Institution(s) – a.k.a. Host:** The institution(s) and/or OΔK circle(s) that successfully bid for and coordinate all facets of the
- **Host Team:** This is group of individuals from the Host Institutions(s) and is a subgroup of the Conference Planning Team. The **Host Team Leader (HTL)** is a member of the CPT.
- **RFP Coordinator:** The RFP Coordinator is the sole point of contact in OΔK for this procurement. All communication between the Vendor and OΔK upon receipt of this RFP shall be with the RFP Coordinator.
- **Proposer:** The individuals/institutions that propose and submit the bid one or both of the conferences.

RFP Coordinator

Dr. Timothy A. Reed, Associate Executive Director
224 McLaughlin Street
Lexington, VA 24450
540-458-5336
tim@odk.org

Conference Planning Team Leader

TBD

Any other communication will be considered unofficial and non-binding on OΔK. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Proposal.

ESTIMATED SCHEDULE

Issue RFP:	November 12, 2018
Questions Due:	November 30, 2018
RFP Webinar	December 4, 2018
Proposal Due:	January 11, 2019
Evaluate Proposal:	January 25, 2019
Announce Host Contractors	February 1, 2019
Issue/Sign Contract	ASAP

OΔK reserves the right to revise the schedule above.

SUBMISSION OF PROPOSAL

The Proposal must be submitted electronically as set forth below.

The Proposal is to be emailed to the RFP Coordinator at tim@odk.org. The email should be clearly marked with the year of the conference RFP Number (NLC 2020 or NLC 2021) to the attention of the Dr. Timothy A. Reed.

Any modifications to a Proposal will be subject to these same conditions. The Proposal must respond to the procurement requirements. Please include URL links to floor plans, menus, photos, etc. The Proposal must be complete and must stand on its own merits. Failure to respond to any portion of the procurement document may result in rejection of the Proposal as non-responsive. All Proposal and any accompanying documentation become the property of OΔK and will not be returned.

ACCEPTANCE PERIOD

The Proposal must provide 90 days for acceptance by OΔK from the due date for receipt of the Proposal. OΔK also reserves the right, however, at its sole discretion to waive minor administrative irregularities.

MOST FAVORABLE TERMS

OΔK reserves the right to make an award without further discussion of the Proposal submitted. Therefore, the Proposal should be submitted initially with the most favorable terms which the Institution can propose. OΔK reserves the right to contact any Proposer or vendor listed by the Proposer in the RFP for clarification of its Proposal and request a face to face meeting. It is understood that the Proposal will become a part of the procurement file on this matter without obligation to OΔK.

COSTS TO PROPOSE

OΔK will not be liable for any costs incurred by the Proposer in preparing a Proposal submitted in response to this RFP, or in performing any other activities related to responding to this RFP.

NO OBLIGATION TO CONTRACT

This RFP does not obligate OΔK to contract for the services specified herein.

REJECTION OF PROPOSAL

OΔK reserves the right at its sole discretion, and without penalty, to reject any and all proposals received and not to issue a contract as a result of this RFP.

NATIONAL LEADERSHIP CONFERENCE INFORMATION

Proposed Dates of the NLC

The National Leadership Conference will be a maximum of three nights and three days of programming. Due to the nature of academic and work schedules, Thursday through Sunday dates are preferred. The following are preferred conference dates:

<u>2020</u>	<u>2021</u>
June 4 - 7	June 3-6
June 11 - 14	June 10-13
June 18 - 21	June 17-20
June 25 - 28	June 24 - 27

Target Audience

Conference attendees will be collegiate members of OΔK, faculty advisors, circle coordinators, alumni members, and leadership of the national organization. Vendor and company representatives will also be in attendance.

Intended Outcomes

Participants will leave the conference with new knowledge and skills to excel in their campus roles and develop as a leader. As a result of this program, collegiate members and circle advisors gain a knowledge of OΔK's mission, values, resources, and a strong understanding of their role as leaders on campus and within their circle. The participants will have the unique opportunity to share feedback and ideas with national headquarters staff and national leadership. Additionally, both collegiate members and circle advisors will experience personal and professional growth and gain a professional network.

SCOPE OF SERVICES

Host Institution Responsibilities

Financial Responsibilities

- *The Host Institution should be prepared to provide substantial support for the program.* It is expected that the Host Institution will cover all indirect costs for facilities (i.e., meeting rooms, audio-visual needs) and provide reasonable prices for direct costs (i.e. labor, service fees) throughout the conference experience. Meal costs should be negotiated with the food service providers to provide the best possible value for the conference
- OΔK seeks to make the national conference as cost effective as possible to provide access to collegiate members and other participants. While expenses are negotiable, higher costs will increase the registration fee.
- OΔK will agree to pay deposits for securing the contract. All other expenses must be invoiced to OΔK via one master invoice within 30 days of the end of the conference unless specifically agreed to in advance of the signing of the conference agreement. OΔK reserves the right to pay the master invoice in no less than net 30 days.

General Responsibilities

- The Host Institution is responsible for the coordination of facility/lodging/catering needs, local transportation support, and other on-site needs.
- The Host Institution will also be responsible for identifying local social and leisure activities and coordinating these opportunities with the CPT.

- The Host Institution will collaborate with headquarters staff for sponsorships to promote beneficial cost saving for conference attendees.
- The Host Institution will collaborate with the CPT to plan and execute a service project.
- The Host Institution will support Conference Planning Team in marketing, event registration, program materials, and logistics.

Location

- The business of the conference (Host Site) should occur on a university or college campus that has an active OΔK circle. The Proposer may propose the Host Site be in a hotel or conference center but must include some programs and activities on nearby university/college campuses with active OΔK circles.
- The location of the Host Site should be no further than 45 minutes in standard traffic from a major transportation hub (airport/train station).
- The location of the major host city will be no further than 30 minutes from the campus at which the conference is being held.

Meeting Facilities

- The Host Site campus must have space capacity for at least 300 conference participants.
- No less than one main multi-purpose room or ballroom that can hold all participants at a seated meal.
- No less than 5 breakout rooms or classrooms with a capacity of at least 50.
- No less than 2 breakout rooms or classrooms with a capacity of at least 75.
- All breakout rooms or classrooms should be within a contiguous space such as a student center, conference center, or classroom building.
- A Board Room to seat 30 for meetings of the OΔK Board of Trustees during the NLC.
- Contiguous space to accommodate (20) 8'x10' exhibit booths
- Lounge areas with some seating for informal gathering between sessions
- Conference registration and welcome area in an appropriate and visible location
- Full catering amenities to include buffet meals, refreshment breaks, cocktail-style receptions and boxed lunch options
- The meeting rooms must be fully equipped with projection, audio/visual and computer access for presentations.
- The Host Site must provide a secure and lockable room or rooms equivalent to 250 square feet to serve as the Conference Headquarters from the two days prior to start and one day following the end of the NLC.
- This room must have adequate power to operate several computers and printers.

The Proposer must provide details of all proposed meeting and event facilities including room capacities, configurations, and costs including anticipated taxes, fees, and gratuities attached as **Appendix A**.

Lodging

If the Proposal provides for on-campus housing for all or part of the participants, the following are expected:

- The Host Site will have on-campus housing available sufficient for all participants.
- This housing should provide suite-style housing (2-4 people sharing a bathroom) and single style (1 person with one bathroom) and must be adequately climate controlled.
- Communal bath facilities are not acceptable.
- Complete linen service must be provided.
- Access to health and fitness facilities at no or reduced costs.
- 24-hour security personnel on site in the residences areas.

If the Proposal provides for hotel accommodation for all or part of the participants, the following criteria must be met.

- The hotel is within a 10minute drive to the location of campus meetings and should be within walking distance with sidewalk or walking/bike path access.
- The hotel provides for single, double, and suite style rooms.
- The hotel provides access to health and fitness facilities at no or reduced costs

- The apparent successful Host will be expected to work with the official OΔK Hotel contractor, HelmsBriscoe, unless the Host site has a specific contractual arrangement with hotels in the area.

The Proposer must provide detailed estimates of all lodging costs included anticipated taxes, fees, and gratuities in **Appendix B**.

Technology

- The Host Site, and hotel if applicable, must provide free unsecure wireless and wired internet access for all participants.
- The Host Site should, as the expense of the NLC, be able to provide secure internet access via an Ethernet or wireless connections for the Conference Headquarters and Store.
- The Host Site must provide audio-visual equipment throughout the conference – particularly during the general sessions, panels, and main speakers – along with a dedicated onsite to help with troubleshooting as necessary.

Meal Requirements

The schedule should include be two full breakfasts (Fri./Sat.), two lunches (Fri./Sat.), two dinners (Thurs./Sat.), one to two refreshment breaks (Fri./Sat) and one grab and go breakfast (Sun.) Ideally, meals will be held on campus in an area that will allow for networking to occur among attendees or allow for a speaker during the meal. The Host Institution should work with their dining service or other local contacts to get the most beneficial cost for conference meals. Use of the campus dining hall is acceptable for some meals.

Meal options should include:

- Continental breakfast or full hot breakfast
- Boxed lunch, food court/dining hall lunch, or buffet lunch
- Seated dinner and/or buffet dinner

Food service provider must provide examples of special dietary menus for attendees as identified as vegetarian, vegan, nut or dairy allergic through conference registration process.

The Proposer must a sample meal budget or price per person (based on 300 registrants) on different meal options as **Appendix C**.

Host City

- The host city and Host must have anti-discrimination policies in place and must be ADA compliant.
- The host city must have at least 3-4 sites and/or events of interest for participants to visit
- The Host must provide participants with local tourism information and coordinate a shuttle service for participants to explore the city.

Sample Schedule

Monday	CPT/Staff Arrival
Tuesday	CPT, Host Team, and Staff meeting, NLC Office set up
Wednesday	Board of Trustees meeting, Store Set-up
Thursday	Day 1 <ul style="list-style-type: none"> ○ Pre-Conference Session (if applicable) ○ Conference attendees arrive and check-in at hotel or campus ○ Orientation session ○ Welcome dinner ○ Keynote speaker ○ Evening social or program event
Friday	Day 2 <ul style="list-style-type: none"> ○ Opening speaker - all conference attendees ○ Concurrent sessions ○ Keynote speaker ○ Service project

	<ul style="list-style-type: none"> o Open schedule evening – on-campus social activity and/or transportation to off-site activity or to nearby city
Saturday	Day 3 <ul style="list-style-type: none"> o Opening speaker – all conference attendees o Concurrent sessions o Luncheon with Speaker o Evening reception, award banquet, entertainment
Sunday	Day 4 <ul style="list-style-type: none"> o Continental Breakfast (Grab-n-Go) as conference attendees depart o CPT/Host Team/Staff post conference meeting o CPT/Host depart in the late afternoon o Provisions should be made for some CPT/staff to stay an additional night to in the morning of Day 5

Evaluation Criteria

Evaluation Code	Area	Description	Possible Points
General Criteria Evaluation			
1.0	Location	Location of Proposed Host Site and Host City	10
2.0	Meeting Facilities	Quality and Availability of Meeting Facilities	20
3.0	Lodging	Quality and Availability of Lodging Facilities	20
4.0	Meals	Quality and Variety of Meal Plans	10
5.0	Technology	Quality and Availability of Technology Support	5
		Total Possible General Criteria Points	65
Cost Proposal Evaluation			
6.0	Host Support	Total Financial Support of Host Institution(s)	5
7.0	Lodging Rates	Favorable Lodging Rates	10
8.0	Meal Rates	Favorable Meal Rates	5
9.0	Over All Price	Overall cost of all factors proposed	15
		Total Cost Proposal Criteria Points	35
		Grand Total Possible Points	100

2020 or 2021 National Conference Request for Proposal Form

The following information **must** be included in national conference Host Institution applications. Applicants are encouraged to provide additional information that will help in the site selection process, such as photos, links to catering menus and hotels, room diagrams, etc.

Proposer/Host Institution Information

	Proposer Contact 1	Proposer Contact 2
First/Last Name		
Title		
Department		
Institution		
Mailing Address		
Email		
Phone		
Active OΔK Circle	_____Yes _____No	_____Yes _____No

- Rank or the Proposed conference dates for 2020, 2021, or both based on the dates provided in the RFP information. If none of these dates are possible, provide alternate dates (Not before May 15 and not after August 1) and justification for why OΔK should consider these dates.

Rank Order	Conference 2020	Conference 2021
1 st Choice		
2 nd Choice		
3 rd Choice		
4 th Choice		

Alternative Dates and Justification:

- Detailed Information on all collaborating locations/institutions (joint host campuses, conference facilities, etc.)

- Answers to the following questions:

- Has your institution ever hosted a national conference before? When?

- Why would your institution make a great host site?

- How will your institution support the conference experience (financially, hospitality, entertainment, creative catering options, etc.)?

CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the Proposal, understanding that the truthfulness of the facts affirmed herein and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached Proposal is a firm offer for a period of 90 days following the due date for receipt of proposals, and it may be accepted by OΔK without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of OΔK whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official capacity. Any exceptions to these assurances are described in full detail on a separate page and attached to this document.
5. I/we understand that OΔK will not reimburse any costs incurred in the preparation of this proposal. All proposals become the property of OΔK and I/we claim no proprietary right to the ideas, writings, items, or samples presented in the proposal, unless so stated in the proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the consultant and will not knowingly be disclosed by him/her prior to opening, directly or indirectly, to any other consultant or to any competitor.
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the consultant to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
- 9.

	Proposer Contact 1	Proposer Contact 2
Signature	_____	_____
Printed Name	_____	_____
Date	_____	_____

Requests for proposal are due to the headquarters by January 11, 2019, for full consideration.

Materials should be submitted as a PDF file via email to:
Dr. Timothy A. Reed
Associate Executive Director for Business and Membership Services
Omicron Delta Kappa
224 McLaughlin Street
Lexington, VA 24450
tim@odk.org
(540) 458-5345

APPENDIX A – MEETING FACILITIES: [EXAMPLE]

Bldg	Rm #	Room Capacity						Standard Rates		
		Lecture	U-Shape	Conf.	Classroom	Banquet	Open	Up to 4 hrs	Add'l Hours	All Day - Conf.
Bldg. A	100	76	35	30	68	68	100	\$ 155	\$ 15	\$ 300
Bldg. A	101	57	26	23	51	51	75	\$ 120	\$ 12	\$ 250
Bldg. A	102	34	16	14	31	31	45	\$ 70	\$ 10	\$ 150
Bldg. A	103	34	16	14	31	31	45	\$ 70	\$ 10	\$ 150
Bldg. B	201	494	N/A	N/A	442	442	650	\$ 1,000	\$ 100	\$ 2,000
Bldg. B	201a	243	N/A	N/A	218	218	320	\$ 550	\$ 55	\$ 1,200
Bldg. B	201b	133	61	53	119	119	175	\$ 275	\$ 30	\$ 600
Bldg. B	201c	133	61	53	119	119	175	\$ 275	\$ 30	\$ 600

APPENDIX C - MEALS: [EXAMPLE]

Estimated Budget Plan

Misc	Other	Price/Person	Attendees	Estimated Cost	Estimated Taxes	Service Fees
Meals	Day 1 Reception-Circle Advisor	\$ 25.00	75	\$ 1,875	\$ 206	\$ 338
Meals	Day 2 Breakfast (Fri)	\$ 8.75	300	\$ 2,625	\$ 289	\$ -
Meals	Day 2 Lunch (Fri)	\$ 20.00	300	\$ 6,000	\$ 660	\$ 1,080
Meals	Day 2 Reception - Meet the Candidates (Fri)	\$ 15.00	200	\$ 3,000	\$ 330	\$ 25
Meals	Day 2 Refreshment Break (Fri AM)	\$ 15.00	200	\$ 3,000	\$ 330	\$ 540
Meals	Day 2 Refreshment Break (Fri pm)	\$ 15.00	200	\$ 3,000	\$ 330	\$ 25
Meals	Day 3 Breakfast (Sat)	\$ 8.75	300	\$ 2,625	\$ 289	\$ -
Meals	Day 3 Dinner-Closing/Awards Dinner (Sat)	\$ 40.00	300	\$ 12,000	\$ 1,320	\$ 2,160
Meals	Day 3 Lunch (Sat)	\$ 15.00	250	\$ 3,750	\$ 413	\$ 675
Meals	Day 3 Refreshment Break (Sat am)	\$ 15.00	150	\$ 2,250	\$ 248	\$ 25
Meals	Day 3 Refreshment Break (Sat pm)	\$ 15.00	150	\$ 2,250	\$ 248	\$ 25
Meals	Day 4 Breakfast (Sun)	\$ 10.00	100	\$ 1,000	\$ 110	\$ 25

Proposers should include links to catering menus and catering plans, and when possible, examples of budget plans for similar conferences held at this location.

APPENDIX B - LODGING: [EXAMPLE]

On Campus Residence

Bldg Name	Capacity	Floors	Floor plan	# Rooms/suite	Beds Per Room	Bath	Furniture	Amenities in Building	Average bedroom measurements	Air conditioning
Res Hall 1	636	6	Suite style	2 rooms	2 - extra long twin	Central Shared Bath, Single Private, 2 1 toilet Shower, dual sink	Built-in desks and dresser, study chair, bed, built-in closet without doors, pull shades	Kitchen on every floor, vending and ice machines, study rooms, lounges, TV room, recreation room, volleyball and basketball courts	12'x13' or 13'x15'	Window units
Res Hall 2	404	4	Apartment Style	4 bedrooms Desks, bed, night stand, dresser, built in closet in each bedroom	1 extra ling twin bed	2 baths - shared between 2 bedrooms	Galley kitchen with range, refrigerator, microwave sink and cabinets Living area with sofas, chairs, built in 44 in LED TV, Lamps and end tables.	Vending machines, study rooms, lounges, recreation room,	10' x 12' or 12' x 13'	Central Air

OFF-CAMPUS/HOTEL LODGING [EXAMPLE]

Property/ Website	City	Availabili ty	Dates - 2020	Ratings	Rooms	Sleeping Room Rates USD	Staff Rate	Comps	Breakfast Included	Guestroom Wi-Fi	Meeting Space Wi-Fi	Parking	F&B Min.	Meeting Rental
Hotel 1	City 1	open	No meeting space	4 Star, 4 Diamond	400	\$140	\$110	1 per 40	No	Comp Unsecured wireless	Free Unsecured Wireless	Valet only \$30/day	\$10,000	Waived w/F&B minimum w/ 20 rooms
Notes on Property		Airport shuttle, free but must be reserved, Free use of recreation center, indoor pool, business center.												
Hotel 2	City 2	limited	Negotiable	3 Star, 3 Diamond	150	\$140	\$140	1 per 40	Yes	Comp Unsecured wireless	Free Secured	Free Self-Park	\$15,000	Waived
Notes on Property		Limited airport and local shuttle, Free use of recreation center, indoor pool, business center. 24 hour laundry.												

