

REQUEST FOR PROPOSAL

Organization Name: Financial & Insurance Conference Planners (FICP)
www.ficpnet.com

Meeting Name: FICP Canadian Region Meeting

Contract Legal Entity: Financial & Insurance Conference Planners (FICP)

Authorized Signer: Steve Bova
 Executive Director
 Financial Insurance Conference Planners (FICP)
 401 N. Michigan Ave., 22nd Fl.
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Event Information

Name of Event:	FICP Canadian Region Meeting
Association Niche:	Association is specifically Financial Services & Insurance Conference Planners. Members must be qualified meeting professionals in order to gain membership. <i>*Qualified: Meeting Planner position is the primary function of the employee and works for (or is under annual contract with) a Financial and/or Insurance company. Membership application is reviewed by FICP Headquarters and approved by Board of Directors.</i>
Purpose:	The meeting is for continuing educational purposes and networking events. This regional meeting is an opportunity for financial and insurance meeting planners to attend an educational event at a minimal planner registration fee through the generosity of the event sponsors. This meeting also includes a defined ratio of sponsoring Hospitality Partners (HP) to meeting planner with a goal of 1 planner to 1.5 HP. Hospitality Partners, includes destination management companies, convention & visitors bureaus speaker bureaus, transportation companies (airline, cruise, rail/train), brokers, AV/production companies and entertainment companies.
<u>FICP's Financial Impact</u>	FICP is an association of approximately 450 Financial and Insurance meeting planners representing over 200 different companies. An average FICP meeting planner spends an estimated \$1.7 million annually in meetings (including hotel, Destination Management, Event, Catering, and entertainment expenditures). This Regional Meeting provides exposure to an estimated 40 meeting planners who, as an aggregate, spend \$68 million (40 planners x \$1.7) annually on meetings. This provides a great opportunity to showcase your property to this group of meeting buyers.

Location/Venue/Date Requirements	<p>The Design Team, made up of meeting planners within the region, as well as hospitality partners, has identified the following criteria for the location of the upcoming Canadian Region Meeting.</p> <ul style="list-style-type: none"> ▪ Preferred Locations: Toronto ▪ 2 night/ 2.5 day ▪ Preferred Date: August 23 -25, 2012 or August 24 -26, 2012 ▪ 4-5 Diamond Hotel or Resort ▪ Superb Convention Services and Staffing ▪ Variety of sleeping rooms ▪ Recreation/health club, and cultural activities on property or in close proximity ▪ Within 30 minute drive of major airport 															
Meeting History	<p>This annual event has been held in various Canadian locations noted below.</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 15%;">August 2011</td> <td style="width: 60%;">The Ritz-Carlton Toronto,</td> <td style="width: 25%;">Toronto, Ontario</td> </tr> <tr> <td>August 2010</td> <td>Fairmont Tremblant,</td> <td>Mont Tremblant, Quebec</td> </tr> <tr> <td>August 2009</td> <td>Sheraton on the Falls,</td> <td>Niagara Falls, Ontario</td> </tr> <tr> <td>August 2008</td> <td>Hilton Lac Leamy,</td> <td>Gatineau-Ottawa, Quebec</td> </tr> <tr> <td>August 2007</td> <td>Four Seasons Hotel,</td> <td>Toronto, Ontario</td> </tr> </table>	August 2011	The Ritz-Carlton Toronto,	Toronto, Ontario	August 2010	Fairmont Tremblant,	Mont Tremblant, Quebec	August 2009	Sheraton on the Falls,	Niagara Falls, Ontario	August 2008	Hilton Lac Leamy,	Gatineau-Ottawa, Quebec	August 2007	Four Seasons Hotel,	Toronto, Ontario
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	<p>The anticipated room block is 218. Group room rate should be honored 2 days pre- and post- event in case meeting planners or hospitality partners would like to extend.</p> <p>The Room Block cut-off needs to be 21 days prior to the meeting. If there are additional meeting planners participating after the cut off date, the hotel will work with the Regional Chair to accommodate. As a courtesy, we request the negotiated room rate be extended to Hospitality Partners based on hotel availability.</p>															
Staff Rooms:	<p>There will be up to (2) FICP HQ Staff/Executive Director attending the meeting. FICP requests that the rate for these individuals is complimentary. Additional staffing includes contracted speakers and/or media partners who are neither planner members nor hospitality partners.</p>															
Planner/HP Ratio	<p>FICP strives to maintain a 1 planner to a 1.5 Hospitality Partners ratio for FICP meetings</p>															
Host Hotel/ Design Team	<p>FICP is incredibly appreciative of the commitment a hotel makes to host a Regional Meeting and is dedicated to ensuring the best exposure possible. A member of the Host hotel will serve on the meeting Design Team and is instrumental in the planning process. The meeting agenda will have time allocated for a property tour showcasing the venue. Additionally, the Host Property will have additional delegate spots for on-property breakfasts, lunches and dinners.</p>															

<p>Food & Beverage:</p>	<p>Food and beverage pricing should be guaranteed at time of contract signing.</p> <p>The Host hotel/resort will provide the food and beverage for the meeting noted in the specifications. We encourage the Host hotel showcase their food and beverage capabilities and culinary uniqueness. We prefer networking events with food stations/buffets rather than a seated affair to support a free-flowing opportunity to ‘move and meet’.</p> <p>Provide food and beverage pricing in your proposal with inclusive ‘per person’ pricing for breakfast, breaks, lunches and the opening night reception and dinner. The 2nd evening dinner is an optional hosted event if desired by the hotel.</p> <p>Note: In the chapter’s efforts to encourage a healthy lifestyle and diet, the food and beverage events must include healthy choices and portion controls. The Hotel contact along with the Regional Chair will review menu offerings and budget prior to contract signing.</p>
<p>Attrition & Cancellation:</p>	<p>Due to the fact that FICP and the hotel are partnering to produce this Regional Meeting, and because it is a marketing opportunity for the hotel, there will be no attrition or cancellation requirements in the final contract.</p>
<p>Hospitality Partner: (HP)</p>	<p>Hospitality Partners include hotels, destination management companies, convention & visitors bureaus speaker bureaus, transportation companies (airline, cruise, rail/train), brokers, AV/production companies and entertainment companies.</p> <p>Note: Third-Party management companies and other event sourcing companies are not eligible to attend unless invited as a speaker and approved by FICP HQ/ Board representatives.</p>
<p>Meeting Space:</p>	<p>Refer to specific Meeting Space and Agenda requirements on the following pages of this document.</p> <p>Note: While reviewing space, there should be no columns or obstructions in the general session room plus there needs to be plenty of square footage for the group to have crescent seating for 110 people, in addition to food/drink stations in the back of the room. Additionally, the ceiling height should be a minimum of 11ft.</p>
<p>Site Selection Process</p>	<p>Proposals should be sent to the attention of Laura Greer at lgreer@ficpnet.com. The Regional Chair and Vice Chair will review all proposals and select the final venue. The venue contract will be reviewed and signed by the Executive Director in Chicago and sent to the Regional Chair. Proposals are due by Friday, October 28, 2012.</p> <p>The final selection will be based on a number of factors including RFP response and concessions, room rate and availability, available meeting space, hotel reputation, future business potential based on planner demographics and an FICP Educational Forum or Annual Conference or Regional Meeting has not been there in a number of years.</p>

Hotel Sponsorship Expectations

Hosting an FICP Regional meeting is an opportunity for a hotel/resort to showcase its facility, culinary efforts and service standards to highly qualified meeting professionals. The Host hotel will be expected to sponsor the Canadian Region meeting by providing Hosted elements noted in three categories: **Meeting Planner** Hotel Rooms, Food and Beverage On-Site, and Audio Visual. To help offset the expense to the Host Hotel, the Hotel will realize revenue from the registration fees directly related to the sleeping room and F&B costs of the **Hospitality Partners** attending the meeting. This will supplement hotel's food, beverage, and hotel room costs of the non-planner participants. FICP will provide an attendee report one week post meeting along with anticipated revenue.

1. Meeting Planner Hotel Rooms: Hotel is asked to provide approximately 90 complimentary rooms over two nights for the meeting planners and staff attending the FICP Regional Meeting, as well as a discounted room rate for those that would like to stay before and after the program. Suite upgrades and valet parking are not expected and is at the discretion of the host hotel.

2. All Food and Beverage Events On-site for qualified Meeting Planners: This includes one Welcome Reception and Dinner (sponsored by the hotel), two breakfasts, four breaks, and two lunches. The Hospitality Partners fee will cover their own room nights as well as the F&B functions not sponsored by the hotel.

Note: The host hotel may elect to sponsor the second night dinner but this is not a requirement. Many host hotels will work with partnering local companies to sponsor this evening off-site. If not, FICP will identify an additional sponsor.

Note: The Hospitality Partner Fee is based on a two day meeting model as follows:

- Two-Night Stay Model:* A Hospitality Partner fee of \$750 is inclusive of room, tax food & beverage which also includes one (2) breakfasts, two (2) lunches and four (4) breaks and one (1) Hospitality Partners pre-meeting with non-alcoholic beverage service. Host Hotel provides complimentary sleeping rooms and tax to meeting planners and staff, and hosts one evening reception and dinner event. The second dinner will be held off property and sponsored separately.

3. Standard Audio-Visual equipment for the entire meeting (LCD projector, screen package, wireless microphones, flipcharts, podium, and appropriate labor support) is to be included by in-house AV.

Note: The decision on the selected hotel will not be based on any other FICP related sponsorships.

ANTICIPATED HOTEL REVENUE

FICP has a strict ratio of planners (MP) versus hospitality partners (HP) ~ 1 MP to max 1.5 HP~ to preserve the appropriate balance for peer to peer networking and education opportunities. The Hotel's **guaranteed** revenue will be realized from the registration fees of the Hospitality Partners attending the meeting.

Meeting Planner Fees:

The meeting planners pay a minimal registration fee of \$75-\$125 based on a one or two day meeting model to cover administrative costs. *Hotel will not receive this income from Planners.*

Hospitality Partner Fees:

The Hospitality Partner fee is based on a one or two day meeting model. The registration fee will cover the hotel food and beverage and room costs for these individuals. ****The Host Hotel will be guaranteed this income based on the actual number of attendees. ****

Sample: Hospitality Partner Registration fee breakdown based on \$950:

Hotel:

2 night-Room Cost (\$200 per night inclusive): \$400

F&B for entire meeting: \$350

Guaranteed Revenue per (HP): \$750

Other Expenses:

Speaker Support & Miscellaneous items \$200

Total HP Registration Fee: \$950

FICP REGIONAL MEETING DETAILS

DATES

2012 Preferred Dates: August 23 -25 (Thurs. – Sat.) or August 24 -26 (Fri. – Sun.)

ROOM BLOCK

Planners (Complimentary on Peak nights)		40	40		80
Hospitality Partners/Sponsors (Paid through registration fee)		60	60		120
Staff/ Speakers/Media	3*	4	4	1*	12
Strategic Sponsors**		3	3		6
Total	3	107	107	1	218

*=pre and post rooms

** Some FICP Strategic Partners receive complimentary access to the regional meetings through their partnership. Since a registration fee is not collected, FICP requests the hotel place their rooms on the master bill. Hotel will receive payment for all strategic partner hotel rooms.

Agenda

Day 1	EVENT	NOTES/ AV/ SET UP
Arrivals – All Day	Scattered Arrivals Hotel Check in	Attendees on own Approximately 110 attendees
10:00 – 11:00 am	Registration	Hotel discretion
8:00 AM – 5:00 PM **Request 24-hr hold**	Meeting	Meeting Room (#2) LCD/Screen/Flipchart Lavalier mic (1) + (1) handheld Podium, 6ft head table, (2) bar stools Set crescent rounds for 110
12:00 – 1:15 PM	Lunch	Set in rounds for 110 Meeting Room (#1)
1:15 – 1:30 PM	Break	Attendees on Own
1:30 – 5:00 PM	Meeting	Meeting Room (#2) LCD/Screen/Flipchart Lavalier mic (1) + (1) handheld Podium, 6ft head table, (2) bar stools Set crescent rounds for 110
6:00 – 7:30 PM	Welcome Reception	Sponsored by host hotel
7:30 – 9:00 PM	Dinner	Sponsored by host hotel

Day 2	EVENT	NOTES/ AV/ SET UP
7:30 – 8:30 AM	Buffet Breakfast, Flow <i>Note: No formal presentations</i>	Set in rounds for 110 Meeting Room (#1)
8:30 AM – 5:00 PM **Request 24-hr hold** Mid Morning Break- TBD Mid Afternoon Break- TBD	Meeting	Meeting Room (#2) LCD/Screen/Flipchart Lavalier mic (1) + (1) handheld Podium, 6ft head table, (2) bar stools Set crescent rounds for 110
12:00 – 1:30 PM	Lunch	Set in rounds for 110 Meeting Room (#1)
Evening	Dinner	NOTE: <i>It is up to the host hotel if they want to sponsor this evening. Many host hotels will work with partnering local companies to sponsor this evening off-site.</i>

Day 3	EVENT	NOTES/ AV/ SET UP
8:00 – 9:00 AM	Buffet Breakfast, Flow <i>Note: No formal presentations</i>	Set in rounds for 110 Meeting Room (#1)
9:00 – 11:30 AM	Meeting	Meeting Room (#2) LCD/Screen/Flipchart Lavalier mic (1) + (1) handheld Podium, 6ft head table, (2) bar stools Set crescent rounds for 110
11:30 am	Lunch/Departures	Boxed lunches to go

REQUESTED CONCESSIONS

FICP expects the following in the contract:

- Complimentary space for food & beverage events and meeting space.
- Complimentary internet connection in the meeting room (if required).
- Complimentary internet connection for meeting planner rooms.
- Complimentary color printer at registration desk.
- Complimentary Staff Office space one day prior to meeting plus during the actual meeting days.
- No Resort Fee for all guests.
- Contract Attrition/Cancellation clauses must state there will be no penalty charged for attrition or cancellation, per the Financial Insurance and Conference Planners Association. If there is a cancellation, FICP will do our best to reschedule the event at your facility at a future date.
- No telephone access charges for 800, credit card or local calls made either in guest rooms or in the meeting office or registration desk.
- Advise of any union contracts with your facility and the contract expiration dates.
- Group negotiated Conference rate for non-meeting planners honored three (3) days pre and post conference dates. **If meeting planners pre/post extend, they will pay the Conference negotiated rate.*
- **No surcharge for client bringing own LCD projectors or external Audio Visual company.*

ADDITIONAL INFORMATION NEEDED FOR YOUR PROPOSAL:

Please include Catering Menus and an Audio Visual Price List from the property's in-house audio-visual company with your proposal.

*Although standard Audio Visual will be provided by the Host hotel, in some instances special requirements by speakers are necessary. These additional AV charges will be paid for by a sponsor or FICP.

APPENDIX

FICP Mission Statement

FICP supports financial and insurance meeting planner professionals and hospitality partners who seek to deliver results for their companies and provide high-quality information, education and a networking forum that enhances both business and professional development opportunities. Unlike other professional meeting planner associations, FICP provides more intimate relationship-building and educational forums that create a deeper understanding of the needs of the financial services and insurance sector so that FICP members and hospitality partners can increase their success and value within their companies and the hospitality industry.

FICP “Green” Initiative

FICP is supportive of “green meetings” initiatives and practices. Please include your hotel’s green initiatives and practices in the proposal. We will be incorporating green meeting practices into our banquet specification guide such as water stations and/or water pitchers instead of bottled water, glassware/reusable products instead of disposables, etc.

Master Billing/ Invoicing:

FICP will establish a Master Account for approved Food & Beverage charges, AV and approved Rooming List. The final invoice should be sent to the representative noted in the **CONTACT INFORMATION** on the first page for an audit review prior to final payment by FICP.

- Master 1: Room/Tax/Resort Fee
 - *The rooming list will be provided by a Rooming list. Meeting Planner and Hospitality Partners will be noted for identification and billing purposes.*
- Master 2: Food and Beverage Charges (*Non-Meeting Planners*)
- Master 3: Miscellaneous Charges (Business Center, other)