



**AMERICAN PLANNING ASSOCIATION, CALIFORNIA CHAPTER  
PROFESSIONAL SERVICES AGREEMENT**

**CONFERENCE MANAGEMENT SERVICES – 2021**

**APA CHAPTER CONFERENCES**

**SCOPE OF SERVICES**

**FOR CONFERENCE MANAGEMENT SERVICES – In-Person/Virtual  
AND Hybrid**

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**DEENE ALONGI**

DEENE ALONGI shall provide APA California with the professional services described in the following scope of services:

**SCOPE OF SERVICES**

**PRE-, ON-SITE AND POST CONFERENCE MANAGEMENT**

**Site Selection and Coordination of Site Visits**

- Identify future hotels and negotiate contract at no charge to APA California. Consultant will be entitled to **7% or 10%** (depending on particular hotel) of the amount of hotel bookings for originally contracted hotels and any additional hotels as needed. If Consultant is unable to earn commissions for the 2021 and 2022 conferences due to the pandemic or some other unforeseen circumstances, an additional flat fee **as specified in Exhibit C** in lieu of commissions will be added to the base salary until such time that meetings can take in place in person. If the 2021 or 2022 meetings do take place in

person, **only the base salary as specified in Exhibit C will be paid to Consultant as Consultant will earn hotel commissions.** APA California is entitled to receive any hotel points accrued as a result of hotel bookings for originally contracted hotels and any additional hotels as needed.

- Coordinate site selection and planning site visits for future conferences as requested by the VP for Conferences.
- Provide written or verbal updates during the site selection and negotiation process as requested by the VP for Conferences.

#### **Budgeting & Financial Management**

- Provide an itemized estimate of conference budget items that are overseen by the Consultant and review budget of Conference Host Committee (CHC) and provide comments/recommendations for cost savings to the Board, prior to Board approval of the CHC budget.
- Manage conference budget (after CHC develops and Board approves the budget) using Consultant's proprietary budgeting systems.
- Manage/track conference budget and provide regular reports to VP of Conference and ATEGO Resources contracted to oversee Accounting Management Services for APA California.
- Update the CHC Chairs and VP for Conferences on any expenditures falling outside of the scope of the budget. Consultant will oversee items/tasks are on track and provide recommendations for budget item adjustments if needed to remain within budget and conference profit goals.

#### **Management of Timeline & Milestones with Key Stakeholders**

- Work with VP of Conferences and CHC Chairs to develop a schedule with milestone dates for deliverables at an early planning stage for each conference as directed by the VP for Conferences.
- Manage conference timelines and milestones in conjunction with key conference VP's, CHC Chairs and other stakeholders to include the following:
  - Conference Project Schedule and deadlines
  - Conference agenda and timeline
  - Review of creative theme, conference program, promotion materials and design once completed by CHC and graphic designer. Provide recommendations to streamline review process of conference collateral by contracted staff and VP's
- Provide written or verbal updates on Consultant's activities as requested by the VP for Conferences or Board.

#### **Management of all Conference Logistical Services**

- **Service Providers:** Solicit proposals and manage contracts/companies per budget (costs priced separately) for:
  - Conference Decorator (Drayage Company)
  - Audiovisual (AV) services
  - Transportation Vendor
  - On-site Security Personnel
  - Opening Reception Service Providers as needed
- **Keynote Presenters & Entertainment:** Provide contract coordination, management, and provision of AV needs for plenary conference, keynote speakers, entertainment as necessary.
- **Signage:** Identify signage needs based on meeting space locations within contracted facilities and coordinate production and placement of signs with VP for Conferences and graphic designer.

- **Board of Directors:** Manage all meeting and conference logistics including the following:
  - Reserve a block of rooms and maintain hotel rooming list and change reports for Board Members, staff and special guests.
  - Deliver conference packet and related items to Board Members, staff and special guests prior to end of Board meeting.
  - Secure location for Board dinner, including restaurant reservation and menu, in coordination with **Executive Director**.
  - Secure room for Board meeting in coordination with **Executive Director**, including room set up and food and beverage choices.
  - Prepare resume and specification sheets/ event orders for hotel.
  
- **Conference Exhibitors/Sponsors/Advertisers:** Work with the VP for Conferences and CHC Chairs to develop the conference sponsorship program, and provide the following assistance/services:
  - Coordinate and communicate with exhibitors/sponsors from start to finish (assuming that Chapter bookkeeper will issue the invoices) which includes identifying exhibit space/number, layout, staffing questions, **and ongoing communications and confirmations.**
  - Work in concert with CHC to identify and recruit exhibitors/sponsors and respond to inquiries through phone calls and emails.
  - Develop conference sponsorship brochure and coordinate and combine with Chapter sponsorship program as applicable (see scope of services for Chapter Sponsorship Program below).
  - Work with registration coordinator to distribute registration information to exhibitors/sponsors for the conference and with graphic designer to obtain sponsor logos and ads, as applicable.
  - Participate in conference committee calls.
  - On day of conference, assist sponsors as needed.
  - Conference Decorator (Drayage Company)
    - Diagram and layout of Exhibit Space
    - Fire Marshal Permits
    - Convention center and/or hotel sign-off
    - Development of Exhibit Service Kit (ESK) that contains all booth order forms for furnishings, AV, IT and electricity as well as instructions for shipping, set-up and exhibit hours. The ESK will be provided to APA California for distribution to Exhibitors
  - On-site Logistics: Contact/Support liaison for set-up and tear-down between Exhibit Service Provider and Exhibitors.
  
- **Convention Center/Hotel/Venues:** Serve as primary contact for APA California and coordinate with the VP for Conference and CHC Chairs to provide the following services:
  - Assignment of meeting space and layout
  - Audio/visual, Wi-Fi and other technology requirements
  - Special meeting requests as identified by the VP Conferences and/or Chapter President
  - Menu creation and food & beverage management
  - Special events, plenaries and session room specifications
  - Hotel banquet event & set up orders
  - Hotel room block review and consulting
  - Prepare all resumes and specification sheets/event orders

- **Mobile Workshops:** Coordinate with VP for Conferences and CHC Mobile Workshop Coordinator on:
  - Transportation as needed.
  - **Ongoing communications with coordinators and bus company such as revisions, edits, etc.**
  - Staging area.
- **Giveaways:** Coordinate shipment and distribution of
  - Local brochures, give-a-ways and information for on-site usage.
  - Conference bags, ribbons, badge holders and similar items.
- **Staffing:** In conjunction with the CHC's Volunteer Coordinator, develop an onsite staffing plan to fulfill requirements and support functions, including but not limited to:
  - Conference Registration, Check-in and Information Booths
  - Proctor Assistance & Attendance Monitoring at Break-out Sessions
  - Attendance Monitor at General Sessions and Special Event Functions
  - **Working with the VP for Conferences and CHC, identify or contract for guaranteed paid or volunteer additional on-site assistance with mobile workshops when workshops are gathering, etc., as well as assistance for registration and exhibits**

#### **Management of Opening Reception Site Selection & Logistics**

- In conjunction with the CHC Special Events Coordinator, assist with logistics for selecting the site or venue for the Opening Reception.
- Participate in CHC Special Event committee meetings as needed.
- Solicit proposals for vendors, contractors, entertainment, transportation and other support services as required.
- Manage contracts/companies per approved budget and alert VP for Conferences of any recommended budget adjustments.
- Provide consultation on set-up and layout of food and beverage, audio-visual needs, entertainment and special displays.
- Coordinate obtaining local permits, security coverage, and supplemental insurance, if applicable.
- Oversee staff and volunteer staffing needs.

#### **Full Onsite Logistics and Event Coordination**

- Coordinate and set up Registration as needed:
  - Local brochures, give-a-ways and orientation information for conference attendees
  - Conference program, bags, ribbons, badge holders, Board and keynote speaker gifts
- Set up APA California office.
- Coordinate and place Convention Center/hotel informational and directional signs.
- Oversee set-up for:
  - On-site food and beverage functions
  - Opening Reception (on-site or off-site)
  - Exhibit area, general sessions and meeting rooms
  - Mobile workshops staging area
- Hire, develop schedule, and manage on-site support staff.
- Coordinate with CHC Volunteers Coordinator.
- Oversee service providers (including audio/visual, security, transportation) .
- Oversee accounting reconciliation (as requested by VP and as available through program and final bill).

- Conduct Pre- & Post Conference Meetings with Hotel.

#### **Post Conference Services**

- Provide written post-conference evaluation and recommendations within 30 days of the final day of the conference.
- Participate in post-conference debrief meeting.
- Provide hotel and meeting costs to VP for Conference and Conference Accountant as early as possible following the conference, but no later than December 1, with identification of associated line items from conference budget.

#### **Registration Services**

- Assist with the initial scoping and securing of the registration services procured by APA California.

#### **Conference & Chapter Sponsorships**

- Work with Board or other designated sub-or ad-hoc committee to develop a Chapter sponsorship program that provides sponsors the opportunity to partner with the Chapter and sections on year-round activities, including the conference. This activity is contemplated for launch in late 2021 with full implementation in 2022.
- Work with Board to develop conference sponsorship brochure and Chapter sponsorship brochure
- Coordinate and communicate with sponsors from start to finish, including identifying conference, virtual, and/or Chapter sponsorship opportunities, sending out confirmations, answering staffing questions, coordinating with the Chapter bookkeeper on invoicing, etc.
- Work in concert with Board to identify and recruit sponsors and respond to inquiries through phone calls and emails
- Provide regular Board updates and participate in Board meetings as necessary
- Virtual Conference Component:
  - Work with the Board and VP for Conferences to develop virtual sponsorship options for the conference sponsorship program and include in sponsorship brochures, and provide the following assistance/services:
    - On day of conference, be ready to assist virtual sponsors as needed
    - Assist Ben Morrison with any other zoom-related meetings as required. (This assumes that the virtual conference component will NOT overlap with the on-site conference especially if we have on-site and virtual sponsors.)
    - Write wrap-up report for virtual component and participate in a post-virtual conference debrief meeting

**The above list of services shall not be considered all inclusive. However, any major new duties required would be subject to discussion and approval from both APA and the Consultant, and no new duties in addition to that set forth in the above Scope of Services shall be performed or require additional compensation without prior written request and approval of APA's Vice President for Conferences or Board.**

## **SCOPE OF SERVICES FOR CONFERENCE MANAGEMENT SERVICES – Virtual Conference Only**

**DEENE ALONGI shall provide APA California with the professional services described in the following scope of services:**

### **SCOPE OF SERVICES**

#### **PRE AND POST CONFERENCE MANAGEMENT**

##### **Cancellation of 2021 Contract – Riverside**

- Enter into cancellation/termination negotiations with the City of Riverside which would have to be moved to 2024. Chapter is committed to Anaheim in 2022 and Fresno in 2023. Negotiations will involve the city convention center and four hotels including The Mission Inn.
- Assuming this can be moved to 2024, re-enter negotiations with convention center and hotels once again for 2024.
- Review all contracts for signature and forward.
- Coordinate site selection and planning site visits for future conferences as requested by the VP for Conferences **if this occurs**.
- Provide written or verbal updates during the negotiation process as requested by the VP for Conferences or designate.

##### **Budgeting & Financial Management**

- Provide an itemized estimate of conference budget items that are overseen by the Consultant and review budget and provide comments/recommendations for cost savings to the Board, prior to Board approval of the budget.
- Manage conference budget (after Board approves the budget) using Consultant's proprietary budgeting systems.
- Manage/track conference budget and provide regular reports to VP of Conferences **and APA bookkeeper**.
- Update the VP for Conferences on any expenditures falling outside of the scope of the budget. Consultant will oversee items/tasks are on track and provide recommendations for budget item adjustments if needed to remain within budget and conference profit goals.

##### **Management of Timeline & Milestones with Key Stakeholders**

- Work with VP of Conferences and conference co-chairs to develop a schedule with milestone dates for deliverables at an early planning stage for each conference as directed by the VP for Conferences.
- Manage conference timelines and milestones in conjunction with key conference VP's, CHC Chairs and other stakeholders to include the following:
  - Conference Project Schedule and deadlines
  - Conference agenda and timeline
  - Review of creative theme, conference program, promotion materials and design once completed by CHC and graphic designer. Provide recommendations to streamline review process of conference collateral by contracted staff and VPs

- Provide written or verbal updates on Consultant's activities as requested by the VP for Conferences or Board.

#### **Management of all Conference Logistical Services**

- **Service Providers:** Assuming a decision to go completely virtual is made by either March or April, Consultant will hold off of finalizing document for the following vendors:
  - Conference Decorator (Drayage Company)
  - Audiovisual (AV) services
  - Transportation Vendor
  - On-site Security Personnel
  - Opening Reception Service Providers as needed
- **Keynote:** Coordinate with virtual conference committee on this activity. Provide contract coordination, management, and provision of AV needs as necessary working with tech coordinator.
- **Signage:** Identify sponsor signage with graphic designer.
- **Board of Directors:** Consultant may be invited to attend 2020 virtual or in-person Board meetings, particularly as it relates to the formation of a Chapter sponsorship program.

**The above list of services shall not be considered all inclusive. However, any major new duties required would be subject to discussion and approval from both APA and the Consultant, and no new duties in addition to that set forth in the above Scope of Services shall be performed or require additional compensation without prior written request and approval of APA's Vice President for Conferences.**