

REQUESTS FOR PROPOSAL (RFP)

Introduction

CEO^c (Louisville Healthcare CEO Council) was formed in 2017 and represents the 15 largest healthcare aging innovation companies founded or headquartered in Louisville, KY. Collectively, **CEO^c** member companies touch 80 million lives annually, employ 500,000 people, and generate approximately \$140 billion (about \$430 per person in the US) in annual revenue. **CEO^c** was designed to leverage the strength and assets of its members to solve important problems that extend beyond the scope of any one single member company.

The Council board leadership is represented by presidents and CEOs of companies across the entire continuum of care. This includes providers and payers, as well as leading education partners. **CEO^c**'s strategic plan capitalizes on Louisville's unique strength in healthcare to solve national problems related to an increasing aging demographic. Each year, our CEOs identify a new challenge area relative to integrated care delivery. A current **CEO^c** led initiative, and this RFP, focuses on various events implemented annually that highlight healthcare issues in the aging population.

CEO^c is comprised of the following board members:

- **Baptist Health** | Gerard Colman, CEO (CEO^c Chairman)
- **Anthem** | Kennan Wethington, President
- **Apellis Pharmaceuticals** | Dr. Cedric Francois, President and CEO
- **Atria Senior Living** | John Moore, Chairman and CEO
- **BrightSpring Health Services** | Jon Rousseau, President and CEO
- **Confluent Health** | Larry Benz, President & CEO
- **Galen College of Nursing** | Mark Vogt, President and CEO
- **Hosparus Health** | David Cook, President and CEO
- **Humana** | Bruce Broussard, President and CEO
- **LHC Group** | Keith G. Myers, Chairman and CEO
- **Norton Healthcare** | Russell Cox, President and CEO
- **ScionHealth** | Rob Jay, CEO
- **Signature Healthcare** | E. Joseph Steier, President and CEO
- **Trilogy Health Services** | Leigh Ann Barney, President and CEO
- **University of Louisville** | Dr. Kim Schatzel, President

RFP Overview

CEO^c is issuing a Request for Proposals (RFP) to secure the services of a qualified company to provide event planning and management services. **CEO^c** requests the planning and implementation services of an event management company for the 2023 OPTIMIZE event. OPTIMIZE is the premier conference convening the top minds in innovation, bringing together a highly curated mix of corporate/C-level executives, entrepreneurs, investors, and industry champions, all focused on the most relevant topics in aging innovation.

OPTIMIZE will dive deep into themes of importance for the evolving world of healthcare. The two-day agenda will culminate with the 2023 CareTech Pitch competition. Selected from applicants around the globe, these finalists will be

chosen from the Global Innovation Search. These innovators will highlight their companies and best-in-class, scalable solutions as part of the journey toward better health outcomes.

RFP Scope

The following is the scope of the services needed before, during, and after the event:

Administrative, Contracts & Financials:

- Provide budget estimates
- Review/finalize vendor contracts
- Select and negotiate prices with partners and contractors
- Participate in weekly logistics and sponsorship meetings

In-Person Conference Logistics KICC:

- Secure and execute room block and determine how to manage
- Work with Levy F&B for all conference menu needs
- Determine, source and secure entertainment options based on budget and program schedule
- Determine vision, theme and ambiance with event décor company
- Manage program as determined by CEOC to coordinate the flow of conference, preparing timed agendas, room turnovers, etc.
- Assist with networking opportunity logistics, including execution of networking components Implement and communicate event provider timeline (Load In / Load Out)
- Create Run of Show and coordinate with technology partners
- Manage on-site registration.

Secondary Evening Event Logistics (cocktail party):

- Secure, finalize and manage venue contract
- Determine & secure F&B needed
- Determine vision, theme and ambiance with event décor company
- Arrange event entertainment

Audio/Visual:

- Work with CEO^C to determine A/V needs
- Research and request proposals for all audio/visual components
- Create conference staging based on budget assigned by CEO^C
- Manage speaker A/V needs
- Schedule and manage A/V and event run-through on site
- Arrange for audio/visual livestreaming for virtual platform

Exhibit Hall:

- Design and create Exhibit Hall layout and placement
- Create and manage check-in process for exhibitors

Volunteer Staffing Management:

- Work with CEO^C to map out onsite volunteer and additional staffing needs
- Recruit and manage onsite personnel.

RFP Deliverables

1. Proposed Methodology and Implementation Plan

- a. A project plan outlining the timeline of all responsibilities, critical path
- b. Action items indicating party responsible for implementation
- c. Resource requirements and any other critical item for implementation
- d. Period required to commence services

2. Pre-Event Preparatory Work

- a. Produce management plan that includes comprehensive and complete written general management approach towards the project that provides a practical approach
- b. Arrange logistics including food and beverage, venue requirements, and lead volunteer management

3. During Event

- a. Provide assistance for onsite logistics and to speakers and participants.
- b. Support registration and volunteer management throughout the event

4. Post-Event

- a. Develop and review final cost in relation to the budget; consolidation and submission of all bills and appropriate documentation.
- b.
- c. Provide assistance with any other post-event related services as agreed upon with CEO^C

Selection Criteria

- **Qualification of Team:** Particular attention will be given to teams with the following: CEO^C current vendors and partners in good standing; companies within the Aging2.0 network, national and international
- **Specialized Experience:** Professional event planning services that include event management, event coordination, theming, décor & styling, conferencing, exhibitions & signage, entertainment and venue sourcing
- **Effective Outreach:** Clear demonstration of prior experience conducting effective outreach to elected and appointed healthcare and financial officials.
- **Quality of Performance History:** At least three attestations duly signed by the companies for which the bidder provided similar services; they must have demonstrated effective cost control, work quality, adherence to schedules/deadlines; the document must include signatory name, telephone, and fax numbers
- **Flexibility and Creativity:** Special attention will be given to teams who express a clear understanding in drafting and implementing flexible ordinances that may be tailored to a Comprehensive Plan or easily adopted in areas with limited local capacity; attention will be given to teams that layout a creative and meaningful plan of action

Point of Contact

Respondents shall restrict all contact and questions regarding this RFP and selection process to the individual named herein. Questions concerning terms, conditions, and technical specifications shall be directed via email at knorris@theceoc.com. Prospective vendors are welcome to send any questions to Kendrick Norris. **Questions regarding the proposal will be accepted between Wednesday, May 17th to Wednesday May 31st, 2023.** Questions after 4:00PM EDT, May 31st will not be addressed. All questions and responses will be made available to all prospective teams.

Proposal Reviews/Interviews/Selection

The CEO^C team, with guidance from a working group comprised of a panel of experts in this area, will review the proposals. If you are selected to be a finalist, you will be asked to interview. Kendrick Norris will email the preferred date once availability has been received by all teams.

Consideration is expected to be given, but is not guaranteed to be given, to the weighted criteria listed on this RFP document. CEO^C reserves the right to reject any and all proposals, to waive any and all formalities outlined in the RFP and in the selection process and generally to make the award that in its judgment, will best meet the objectives stated in this RFP.

Upon notification of selection by the Review Committee, the successful respondent is required to execute and deliver a contract within two weeks of notification. If the successful respondent is unwilling or unable to execute the agreement as required by the RFP, CEO^C has the right to request another respondent to enter into a contract with CEO^C.

All dates in the RFP are subject to change at the discretion of CEO^C and notice of any changes will be provided to all respondents.

RFP Withdrawal

Requests for withdrawal of bids prior to bid opening shall be transmitted to the CEO^C Vice President of Operations, Kendrick Norris via email knorris@theceoc.com

Mistakes

Bidders are expected to be thoroughly familiar with all bid documents, including all addenda. No consideration will be granted for any alleged misunderstanding of the intent of the specifications. Each bidder shall carefully and thoroughly examine these bid documents for completeness. No claim from any bidder will be allowed on the basis that these bid documents are incomplete.

RFP Award

Award will be made to the qualified bidder obtaining the highest score combining price and technical qualifications.

RFP Timeline

The RFP process will take place **Wednesday, May 17th to Friday, June 2nd, 2023**, with a deadline of submission until **4:00PM EDT**. No proposals will be accepted after this time.

Notification of proposal selection is anticipated by June 5th, 2023. The goal is to begin the planning process at the start of June 2023.

Proposal Submission

Each proposal should be submitted by email to Kendrick Norris, CEO^C Vice President of Operations, at knorris@theceoc.com. Proposals must be in the form of a letter including the following information:

- **Documents establishing the eligibility and qualifications of the bidder (10%):** A brief overview of the respondent's organization, the organization's capacity to meet the needs described above (e.g., successful delivery of prior development programs, current customer reviews, etc.), and statement of interest in partnering with the CEO^C team.
- **Technical proposal (60%):** A proposal that includes the implementation and management plan that addresses the scope identified.
- **Financial proposal (30%):** (1) A budget detailing costs associated expenses in providing the event management services and (2) a budget justification describing the expenses included in the proposal.