

Date: January 2019

**LETTER OF INTENT  
AND  
PROPOSAL**

**FOR HOSTING CMC-GLOBAL**

**ANNUAL MEETING OF DELEGATES**

**&**

**CMC INTERNATIONAL CONFERENCE**

**2020**



**CMC - GLOBAL**

**OFFICERS**

Chairman  
Dwight Mihalicz CMC  
Canada  
dwight.mihalicz@cmc-global.org

Secretary  
Kim Karme CMC  
Finland  
kim.karme@cmc-global.org

Treasurer  
Anca Bors CMC  
Romania  
Anca.bors@cmc-global.org

**DIRECTORS OF THE BOARD**  
Rob Bodenstein CMC  
Austria  
rob.Bodenstein@cmc-global.org

Kyeong Seok HAN CMC  
Korea  
kyeong.seok.han@cmc-global.org

Elena Yuzkova CMC  
Ukraine  
elena.yuzkova@cmc-global.org

Jan Willem Kradolfer CMC  
The Netherlands  
JW.Kradolfer@cmc-global.org

Jeremy Webster CMC  
United Kingdom  
jeremy.webster@cmc-global.org

Immediate past Chair  
Sorin Caian CMC  
Romania  
sorin.caian@cmc-global.org

Reema Nasser  
Executive Director  
Jordan  
reema.nasser@cmc-global.org

---

## Table of Contents

<b>Background .....</b>	<b>2</b>
• <b>Annual Meeting of Delegates .....</b>	<b>2</b>
• <b>CMC International Conference.....</b>	<b>2</b>
• <b>Post Meeting Tour .....</b>	<b>3</b>
<b>Overview of Proposal Process.....</b>	<b>3</b>
• <b>Step 1: Letter of intent.....</b>	<b>3</b>
• <b>Step 2: Final proposal .....</b>	<b>3</b>
• <b>Questions for clarification: .....</b>	<b>3</b>
<b>Appendix A Required Content of Proposal.....</b>	<b>4</b>
<b>Appendix B Assessment Criteria for Proposals .....</b>	<b>7</b>



CMC - GLOBAL

## **Request for Letter of Intent AND Proposal (RFP) For Hosting CMC-Global (ICMCI) Annual Meeting and CMC International Conference - 2020**

---

Formal Notice: This document is a Request for Proposal that covers the responses required from applicant Members to be taken into consideration as the host for the CMC-Global 2020 Annual Meeting and CMC International Conference.

It must be noted that issuing this RFP does not imply a contract to necessarily award the hosting to any of the responders.

### **BACKGROUND**

Each year, CMC-Global Members gather for the Annual Meeting of Delegates. In addition to discussing the CMC-Global business, this meeting offers the host member institute to "highlight" their country and its consulting institute. In 2013 the CMC International Conference was launched and has been an annual event since to highlight our brand and encourage interaction and continued learning among the management consultants worldwide.

Our next meeting, the 2019 Annual Meeting of Delegates, as well as the 7<sup>th</sup> CMC International Conference are scheduled this October for Nassau the Bahamas.

#### **• ANNUAL MEETING OF DELEGATES**

This is held every year and normally starts with a reception on the previous evening followed by a day of meetings (followed by an evening event) and ends mid next day (total of 1 1/2 days).

During the days of the Annual Meeting of Delegates it is expected that a parallel partners programme will be organised.

CMC-Global Secretary and ED will schedule the Assembly of Delegates program for the set days and CMC-Global to provide program information to host for inclusion on the website once ready and approved by the board.

CMC-Global would like to have a separate registration table to conduct the official annual meeting of delegates registration and provide voting cards. Host will prepare the voting cards and provide them to the CMC-Global Secretary at the registration table.

#### **• CMC INTERNATIONAL CONFERENCE**

In the days before or after the Annual Meeting of Delegates the Host Institute will organise the CMC International Conference.

The CMC International Conference should have broad appeal to global consultants from all sizes of firms, and to clients of our industry. CMC-Global will assist with international marketing but the prime responsibility for this will remain with the host. Host to prepare the program and confirm speakers. Cost of Speaker fees (or a Speaker's Package if any) to be borne by the host.

CMC-Global Events and Marketing Committees will be working with host to advise/support through bi-monthly meetings or as needed.

**Note:** the list of locations and dates of previous CMC-Global annual meetings and CMC International conferences can be found at <https://www.cmc-global.org/content/icmci-annual-meeting-delegates>.

- **POST MEETING TOUR**

It is expected that an optional post Meeting Tour to places of interest to participants and their partners will be offered.

## OVERVIEW OF PROPOSAL PROCESS

- **STEP 1: LETTER OF INTENT**

Any CMC-Global Member interested in providing a proposal in reply to this RFP is kindly requested to provide an official letter signed by the Chair to include primary contact for communication with respect to the proposal and thereby confirming the intent. Letters are to be sent to the secretariat at: [cmc-global@cmc-global.org](mailto:cmc-global@cmc-global.org) and [reema.nasser@cmc-global.org](mailto:reema.nasser@cmc-global.org) by **29 March 2019**.

***Only IMCs who provide a letter of intent has the right to submit a full proposal. All proposals will be assessed and included in the selection process.***

- **STEP 2: FINAL PROPOSAL**

This document includes details of the required content of the full proposal. Each proposal must address the required content as outlined in **Appendix A**. Proposals will be judged by a selection committee and presented to the Board (with those members of the Board who have a conflict of interest excusing themselves from the assessment) using the criteria outlined in **Appendix B**.

The proposal should also include the arrangements for the Constantinus International Award Presentation of winners. This gala dinner event (business / formal attire) is held as part of the CMC International Conference, generally as one of the dinners.

Before approval and official announcement of the selected host, a formal agreement describing the obligations of each party, based on the RFP and received proposal, need to be signed between the selected host IMC and the CMC-Global.

**The final proposals must be received by 31 May 2019.**

- **QUESTIONS FOR CLARIFICATION:**

Questions or requests for clarifications should be sent to [cmc-global@cmc-global.org](mailto:cmc-global@cmc-global.org) with a cc to [reema.nasser@cmc-global.org](mailto:reema.nasser@cmc-global.org) by **30 April 2019 as a deadline**.

Answers to questions will be addressed to sender within one week.

## Appendix A Required Content of Proposal

---

### 1. **Proposed location, dates and key features, including local IMC benefits**

- 1.1. **Country, city and venue (if known/projected) for the events.** If the proposed venue needs booking by a certain date, this needs to be stated. Facilities (mandatory is Wi-Fi access and a good sound system to enable video) and capacity for the meeting rooms should be specified.
- 1.2. **Proposed dates.** The dates should be in late September or early October of the year. The dates should, if possible, avoid key dates for members of the major religions to avoid excluding trustees of that faith.
- 1.3. **Any key features of the events design** which would facilitate success and/or be of interest to the participants—including any social or networking opportunities, planned conferences to dovetail / coincide with the events, planned post-events excursions, notable opportunities for a partner program, planned use of sponsors to finance events and defer costs to participants, etc.
- 1.4. **Translation / interpreter services:** the official language of CMC-Global is English, therefore, translation services will be provided if needed and to be agreed upon by the host with the delegations of the different countries as per their requirements.  
  
Guidelines document for the Annual Meeting of Delegates can be found at the following link: <https://www.cmc-global.org/content/icmci-annual-meeting-delegates>, and guidelines for the International CMC Conference is available at the following link: [https://www.cmc-global.org/sites/default/files/public/standard\\_-\\_annual\\_cmc\\_internationalconference\\_2017.pdf](https://www.cmc-global.org/sites/default/files/public/standard_-_annual_cmc_internationalconference_2017.pdf)
- 1.5. **Key features of the city/venue**, which would be of interest to participants.
- 1.6. **Identification of any linkage with local events or activities** (organised by the host or others), which might be of benefit to the local Member host and to the participants.

### 2. **Constantinus International Award and Gala Dinner as part of the CMC International Conference**

#### 2.1. **What are the arrangements** for the Constantinus International Award Gala Dinner?

The dinner and award ceremony should be at a venue appropriate for an international award, and the presentation should have at a minimum the following setup:

- podium which is visible to all participants
- computer, projector and screen for presenting videos or slides (full audio-visual service with a sound system to assure sound/music effectiveness during video presentation)
- speakers corner/table
- professional moderator with good command in English
- arrangement for bringing the certificates to the podium (either hostess or senior representative arranged by host IMC)
- flower arrangement to winners (exact amount to be advised per number of winners by the Constantinus office 2 weeks prior to the event).
- professional photographer and video, those would be the property of CMC-Global, keeping in mind appropriate lighting
- two headset microphones for the two moderators
- 2 hand held microphones for guests on stage

**Notes:**

- Nominees to be invited by the nominating IMCs, IMCs may register and pay for their attending nominees using the event website.
- CMC-Global/Constantinus Award office to provide list of nominees to IMC YYY in confidence at the time they are finalized in order that IMC YYY may better manage seating availability and closeness to podium/stage of nominees to this event.
- During the Ceremony, no meal service at all and no drinks! Just before and after but not during.

**3. Assessment of Appeal**

- 3.1. Summary of what makes this proposal of particular interest to our Delegates and CMCs.
- 3.2. Short overview of the proposed participant marketing plan / activities, and a short overview of the host Institute's capabilities to support marketing, promotion, meeting registration and other marketing logistics with a proposed timeline.
- 3.3. Summary of ideas for the Conference. The event should appeal to global consultants regardless of the size firm and as per the criteria available on the website as advised previously. As the host will create a website for the meetings to include registration capability for the Annual Meeting, CMC-Global Conference, Constantinus dinner, and any other optional offerings to include links for registering to the post event tours. Links will be provided to optional day tours, and a choice of hotels for delegates to book – and pay for -- independently with those providers.
- 3.4. Proposed location and logistic arrangements for the Conference
- 3.5. If possible speakers (and possibly alternative attractions) who might attract attendees are able to be proposed, these should be specified.
- 3.6. Assessment of visa requirements, costs and difficulties. How difficult will it be for participants from around the globe to visit the host country? Examples are:
  - Visa advice: host to provide a link to official National government websites where information concerning Visa requirements is available.
  - Access and departure: Taxis and shuttle buses are available both incoming and outgoing. Travelers can easily navigate the international symbols for buses and taxis available at the Airport and obtain assistance from the hotel concierge as needed.
  - Any specific details that visitors to host Country should be aware of are to be included in the events website.
- 3.7. Short assessment of tourist security, including health, terrorism and crime risks.

**4. Assessment of appeal to the host nation**

- 4.1. Summary of proposals to use the presence of CMC-Global to promote CMC-Global
- 4.2. Summary of proposals to use the presence of CMC-Global to promote host Member
- 4.3. Summary of proposals to use presence of CMC-Global to promote the profession

**5. Participant cost overview**

- 5.1. Estimation of the proposed registration fees to each event (including all functions and meals in the agenda), the partner program fee, and the (estimated) fee for a post-events excursion. If some elements of the events are optional, please identify them with their expected costs.

- 5.2. Overview of expected per-night hotel costs, in the proposed city/venue, including taxes. (Note, hosts frequently identify a choice of hotels—a primary hotel and a budget alternative within a reasonable distance.)
- 5.3. Any observations about the likely transportation costs. Is this destination served by low cost carriers? Is the nearby airport an international hub, or will participants need to make travel connections within the country or region?
- 5.4. Inclusion of an early bird registration fee, and a regular registration fee.

**Notes:**

- Delegates and attendees with partners will be informed that they would need to register the partners for the partner tour included as a package by host. Those not wishing to register for the partner tour should have to pay a fee to attend the formal dinners/lunches/receptions if to accompany their partner.
- Above should be included in the announcement and made clear in the pricing scheme on the events website and registration forms.
- Expenses for holding a CMC-Global board meeting to be borne by CMC-Global and addressed in the accounting at the end of the events.

**6. Budget and contribution commitment**

- 6.1. Please forecast a high-level **operating budget** for the events, identifying projected revenue and expenses, including any sponsorships or other third-party revenue sources. Hosts manage their own events pricing, costs and contributions (within the framework of the proposal) and bear the financial risks.
- 6.2. The host to provide online registration system for credit card payments to include wire payments options as well as they are responsible for collecting registration fees.
- 6.3. Please include in this budget a commitment for a contribution for each participant at each of the events (Annual Meeting of Delegates and CMC International Conference) back to CMC-Global. Generally, CMC-Global require a fixed per-participant (excluding partners) contribution from the host Institute to CMC-Global of at least 60 Euros/participant/event. i.e. if a person attends both events, then the contribution to CMC-Global covering this person's attendance is the total of Euro 120.  
  
Sliding scale proposals are possible, linked to the number of participants. This contribution arrangement will be treated as a binding commitment at the final accepted proposal, and payable to CMC-Global under all circumstances and results against an invoice issued by CMC-Global upon receipt of final attending number from host, payment to be conducted within one month of receipt of invoice.
- 6.4. As host is bearing the financial risk for both events, each party is responsible for payment of the fees of its invited guests. CMC-Global is to advise host of any guests whose fees will be paid by CMC-Global. These fees will be included in the final accounting of the events. The €60 payable to CMC-Global is not applicable to either host or CMC-Global invited guests.
- 6.5. Members of CMC-Global Board and Secretariat able to register to attend the all events at no charge and their registration will not be included in the fees payable to CMC-Global (11 persons).

**Important Note:** the registrants full list (to all events) with contact details is the property of CMC-Global.

## **Appendix B**

### **Assessment Criteria for Proposals**

---

The fulfillment of the requirements above (Appendix A) are a main criterion in the evaluation. They are evaluated accordingly to the following principles.

1. Geographic dispersion and balance over time. CMC-Global is committed to holding its meetings in varied locations, seeking to visit continents/regions with a frequency in rough proportion to our membership distribution, and with variation across years. As much as is practical, hosts are chosen to ensure meeting locations are varied.
2. Assessment of participant appeal, including costs (very important, since many participants are self-funded, and our members include institutes in countries with low per-capita GDP), meeting/venue features, security, etc.
3. Local-IMC benefits.
4. Clarity and completeness of the proposal, especially including the propositions for the CMC International Conference
5. Financial contribution to CMC-Global.
6. Benefits to CMC-Global from meeting in the host country
7. CMC-Global judgement on the capacity of the host to successfully organise an international Conference and an Annual meeting.