Texas PRIMA
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Request for Proposals (RFP) for
Conference and Exposition Management Planner
Texas Chapter Public Risk Management Association (Texas PRIMA)
RFP Q&A

RFP Summary:	Texas PRIMA seeks an experienced conference management and event planner (Planner) to provide professional event management and planning services for its annual conference (Conference) that hosts over 700 attendees annually. Texas PRIMA seeks a three-year contract with an option to renew near the end of the term.
RFP Issue Date:	October 13, 2026
Proposal Due Date:	November 20, 2026, 11:59 PM CST
Deadline for Questions:	The deadline for questions is Monday, November 9, 2026, at 5:00 PM CST. Questions or inquiries must be submitted in writing to Jason Hardy at jhardy@irvingtx.gov with info@texasprima.org copied.
Proposal Submission Process:	Submit one electronic copy in PDF format to Jason Hardy at jhardy@irvingtx.gov with info@texasprima.org copied.
RFP Official Contact:	Mandy Riske, Texas PRIMA President, mriske@sanmarcostx.gov , 979.574.7975

ORGANIZATION: Texas PRIMA is an educational and networking association committed to advancing the proficiency of risk management in governmental entities, strengthening the quality of risk management through continuing education, and providing members opportunities to exchange ideas and meet people in or associated with public sector risk management. It is governed by a 10-member board of directors (Board) and contracts an association manager (AM) for daily operations.

EVENT DESCRIPTION: The Conference is the largest public entity risk management conference and exhibition in Texas offering numerous educational sessions and resources. The Conference is typically held in early November and attracts over 700 attendees annually. The Conference features a 4-day in-person event for members, sponsors, and exhibitors who are in or related to the fields of general risk management, emergency management, safety, claims, workers' compensation, human resources, employment practices and benefits. If the need arises for a

virtual or hybrid event, Planner should have the capability to manage and plan for a virtual or hybrid conference.

SCOPE OF WORK: The Board is seeking a conference management company and/or conference event planner to manage the Conference. While the Conference schedule is subject to change based on hotel and conference center availability, the current and anticipated schedule is as follows: Day zero is the day prior to the first day of conference and includes a pre-conference meeting with the Board and hotel staff, as well as the President's Dinner. Day one begins registration mid-day and hosts a scholarship recipient reception followed by a welcome reception in the evening. Day two begins with an opening keynote, is followed by multiple breakout educational sessions, and closes with the association's signature event which includes live entertainment and dinner. Day three is filled with multiple breakout educational sessions, and day four opens with breakout educational sessions and closes with the membership meeting and closing keynote speaker. Conference attendance is expected to exceed 900 in the coming years. Texas PRIMA's goal is to continue to grow its membership and conference attendance. The selected Planner should have the aptitude to manage the growth of Texas PRIMA.

The selected Planner will coordinate and manage the following Conferences for Texas PRIMA:

2027 Annual Conference	November 7-10, 2027	Kalahari Resorts & Conventions, Round Rock
2028 Annual Conference	November 12-15, 2028	Galveston Island Convention Center, Galveston
2029 Annual Conference	November 11-14, 2029	Sheraton Dallas, Dallas

SERVICE REQUIREMENTS

Conference Planning/Management
Manage the planning and implementation process for all aspects of the Conference.
With the Board, develop conference venue options, comparisons, and recommendations.
Establish regular, ongoing communications with the Board and the AM to ensure coordinated efforts and cohesion with overall conference outcomes.
Develop, manage, and execute a master event logistical plan and timeline, and assign/delegate tasks to the Board and AM.
Provide regular updates to the Board, AM and conference committee of upcoming deadlines and project progress, ensuring planning milestones are met.
Present innovative ideas to the Board to improve the overall success of the Conference.
Identify potential challenges and recommend solutions for the Conference to the Board.
Work with the Board on the creation and updating of the Conference program and ensure appropriate room arrangements for presentations and activities.
Provide general administration, management, and day-of execution, collaborating and troubleshooting with the Board and AM throughout the Conference.
Attend scheduled board meetings in the manner in which the meeting is held. If in person, Planner shall be in person; if virtual, Planner shall be on the call.
Coordinate with the Board and AM to ensure efficient flow of information across Texas PRIMA committees (i.e. Executive, Sponsorship, Education, Future Conference Planning, etc.).

Communicate with the Board and AM via phone, email, and virtual calls.
Ensure 24-hour response time for all inquiries.
Exercise good faith in favor of Texas PRIMA when negotiating with venues and third parties.
Oversee and manage all vendor services. Meet with and act as primary point of contact for vendors, ensuring vendor deliverables are timely met.
Conference Announcements & Materials Development
Coordinate with Texas PRIMA to develop the Conference format and agenda.
Plan and coordinate with the Board and AM all aspects of marketing the Conference.
Coordinate with the Board, AM, and graphic designer (GD) to develop/design, proofread, edit, and finalize theme logos, conference announcements, registration brochure, save-the-date postcard, programs, name badges, event tickets, on-site signage, surveys, and any other printed materials.
Oversee the implementation of the marketing campaign on the Texas PRIMA website by working with the Board and AM; ensure updates are made timely.
Request three (3) proposals from printers for items that will be printed and work with the Board to select a vendor for printed pieces. (Printing costs will be paid by Texas PRIMA unless Planner is providing this service.) Printed pieces may include Save-the-Date, Awards Lunch Program, Breakfast Coupons, Name Badges, Event Tickets, On-site Signs, Exhibit Hall Game Piece, Surveys, etc.
Coordinate with the GD and the Board for the creation, text, and update of the *Call for Presentations* and the *Sponsor & Exhibitor Prospectus*.
Coordinate with the Board to select and purchase Conference items and gifts (i.e. bags, pins, ribbons, lanyards, speaker and sponsor gifts, etc.). Cost of items will be billed to Texas PRIMA.
Research and secure conference/hotel venues for future years as requested by the Board.

Manage Conference Registration	
With the Board and AM, set a timeline for registration opening and closing dates, early registration discount, and cancellation fees.	
Coordinate with the AM to ensure the website is updated and ready for registration kickoff.	
Manage and maintain the conference registration process for members, sponsors, and exhibitors through Texas PRIMA's portal, including but not limited to confirming email registrations, answering registration questions, and providing invoices requested by registrants.	
Manage and track contracts and payments from sponsors and exhibitors in accordance with the prospectus. Sponsor and exhibitor payments are paid through the Texas PRIMA system.	
Provide on-site registration management of the event. Additional registration assistants will be hired as needed based on registration numbers. Cost of registration assistants will be paid by the Planner. The following matrix, which includes sponsors and exhibitors, will be used to ensure the appropriate number of assistants based on registration numbers:	
Up to 250 attendees:	One registrar
250 – 500 attendees:	One registrar and one assistant
500 – 1,000 attendees:	One registrar and two assistants
1,001 – 1,500 attendees:	One registrar and three/four assistants
Produce rosters, name badges, and other Conference materials from registration lists.	

Provide all registration and transaction systems and supplies required at conference, including but not limited to laptops, printers, scan-and-print name badges, etc.
Provide real-time weekly registration lists to the Board during the registration period.

Registration, Sponsor Form Processing, & Reporting
Work with the AM to update, review, and edit registration, contract, and benefits forms for sponsors and exhibitors on Texas PRIMA's portal (currently Memberclicks).
Work with the AM to update, review, and edit confirmation emails for registration and sponsors and exhibitors.
Coordinate with the AM for timely and routine delivery of all mailed or emailed registrations (at least weekly). Online registrations and sponsor/exhibitor forms will be processed directly into Texas PRIMA's portal.
Ensure each registrant receives email confirmation of registration and assist with any registrant or sponsor questions. (Failed emails will be audited and updates made where possible.)
Ensure accuracy of entity type on registration form for appropriate fee payment purposes and reach out to registrants to resolve inaccurate categorization.
Monitor and review sponsor/exhibitor contract submissions as received.
Craft emails to periodically send to registrants with additional information prior to Conference.
Assist Texas PRIMA with the rehearsal, recording, and distribution of the "Know Before You Go" video. Texas PRIMA Conference Chair or Designee will create the agenda, assign roles, and determine the content of the video.
Prepare and provide cumulative weekly reports on sponsors and exhibitors beginning with the distribution of the prospectus.
Maintain a listing of all changes requested by conference registrants, sponsors, and exhibitors.

Sponsor/Exhibitor Management
With the Board, contact current and past sponsors and exhibitors. Encourage sponsors and exhibitors to increase their sponsor level commitment based on the approved prospectus.
With the Board, identify and recruit new sponsors and exhibitors.
Coordinate with the Board to ensure fulfillment of sponsor benefits in accordance with the Sponsor & Exhibitor Prospectus (i.e. logo inclusion, signage, exhibit hall assignments, etc.).
Manage logistics including the assignment of exhibit booths and registration of exhibitor personnel.
[1]*Draft eblast to launch sales to sponsors and exhibitors and share with the Board for review prior to sending.
*Prepare final eblast and launch sales.
Ensure Sponsor & Exhibitor Prospectus is posted online when sales open.
Send reminders as needed to confirmed sponsors and exhibitors to complete benefits form.
Provide pre-conference and post-conference attendee list to conference sponsors based on sponsorship level.
Coordinate Exhibit Hall setup with all parties.
Research new sponsor levels if requested by the Board.

[1] *Services Optional

Work with confirmed sponsors and exhibitors to ensure materials are received and access has been provided to exhibit personnel; prioritize and promptly answer all questions.

Coordination with Conference Venue/Hotel
Work closely with the conference venue to ensure the success of the Conference.
Request the reservation link from the conference hotel and provide for posting on Texas PRIMA's website.
Monitor room pick up to ensure rooms are booked at the appropriate rate and that there are adequate rooms to meet registrants' needs.
Ensure hotel transportation is provided if needed.
Negotiate with overflow hotels when necessary to meet the housing needs of registrants.
Provide a pickup and pacing report on rooms reserved at conference hotel to include historical data comparison as requested.
Work with venue to determine setup of meeting spaces to provide adequate seating for each event.
Provide conference hotel with a rooming list for staff, keynote speakers, Board, scholarship recipients, and VIPs with billing information.
Coordinate Board room assignments with President and/or Conference Planning Chair.
Manage and coordinate changes to reservations included in the VIP rooming list as needed.
Ensure VIP room charges from conference hotel are accurate and within negotiated terms.

Food & Beverage Management
Prepare a recommendation for food and beverage based on conference budget and input from the Board. The food shall be appropriate in quality and quantity to the Conference event.
Ensure that requests for special dietary needs are accommodated by planning with the venue.
Maintain data indicating the amount of food ordered and the attendance at events.
Work closely with Texas PRIMA prior to the pre-conference meeting with hotel to determine guarantees as needed.
Track number of attendees for sessions and banquet events to minimize hotel penalties on food and beverage guarantees.

On-site Event Management
Provide a dedicated planner/manager to manage all on-site aspects of the conference and exhibits (4.5 days).
Ensure all slideshows used for Conference events are reviewed, proofread, and provided to audio/visual (A/V) staff.
Ensure accurate preparation and printing of name badges.
Prepare Conference tote bags for each attendee using supplies provided by Planner (Schedule-at-a-Glance, Conference program, game piece), sponsor giveaways, etc. Bags will be provided to attendees as they check in at the registration desk.
Coordinate pre-conference meeting with the Board and hotel staff.

Speaker/Content Management
Coordinate the distribution of the Call for Presentations (via email and Texas PRIMA website) and collect speaker submission information to provide to the Education Chair and Selection Committee for conference sessions selection.
[2]*Draft reminder email for Call for Presentation Submissions deadline and share with Education Chair for review.
*Send email reminders for Call for Presentations submissions.
Coordinate with the Education Chair the review of submissions for accuracy and completion, and the scheduling of a conference call to determine accepted sessions.
Provide the Education Chair and Selection Committee with submission reports and access to the review portal.
Provide reviewer reports to the Selection Committee and moderate the conference call for the selection of presentations to include in the conference agenda.
Send speaker confirmation information to those selected by the Selection Committee. Notify declined presenters.
Collect CEU information from selected submissions and forward them to the AM.
Ensure receipt of all materials needed from presenters including speaker registration form.
Respond to speaker questions as needed to ensure a successful presentation.
Prepare a speaker resource page and share via email.
Upload presentations and handouts (electronic) to the media manager to be accessed through the Members Only area of the Texas PRIMA website.
Upload speaker presentations and handouts to Texas PRIMA portal and/or conference app.

Moderators
Coordinate the Call for Moderators to registrants through the Texas PRIMA portal.
Draft text for the Call for Moderators and share with the Education Chair for review.
Collect moderator information via SignUp Genius.
Confirm moderators three (3) weeks prior to conference.
Create moderator information packets (including scripts and instructions) and schedule. Distribute packets electronically prior to the conference and provide a hard copy on site.
Coordinate, schedule, and conduct a virtual moderator training, which will be recorded and shared with all moderators.
Work with the designated board member to find replacements for moderators as needed.

Coordination with Service Providers
Ensure that billings from all conference vendors are accurate and within negotiated terms.

[2] *Services Optional

Coordinate and hire adequate security and badge checkers for conference exhibit hall. Security and badge checker costs will be reimbursed/paid by Texas PRIMA. Coordinate with security and badge checker during the event.
Coordinate with the Board the research, recommendation and selection of keynote speakers for opening and closing days.
Act as primary contact for keynote speakers before and during Conference including contracting, expectations, scheduling, travel arrangements, conference information and updates.
With the Board, locate and confirm color guard for opening keynote.
Request proposals from up to three (3) exhibition services providers as needed to secure services for exhibit hall set up/tear down, etc. (every 2-3 years as needed).
Summarize proposals received for exhibition services and share with Texas PRIMA designated board member for review and vendor selection. Work with selected exhibition services vendor to contract for a three-year term.
Work with the selected vendor to produce floor plan for exhibit hall based on venue and coordinate updates or modifications as necessary.
Coordinate review, selection, and contracting of entertainment with Conference Chair for Welcome Reception.
Solicit photographer quotes and coordinate with the Board a recommendation for the photographer.
Solicit three (3) A/V quotes for A/V needs – the in-house provider and two (2) other companies.
Work with selected A/V vendor to ensure appropriate and adequate equipment is provided to ensure the success of the Conference.
Ensure all Conference content is provided to the A/V team in advance of the Conference along with the Conference schedule, coordinating with the A/V team which presentations go to each session room. Work with the A/V team on-site to rectify any issues that arise during the event.
Review and analyze the final A/V invoice for accuracy and provide it to Texas PRIMA for payment.
Obtain, review, and analyze the final hotel invoice for accuracy and provide it to Texas PRIMA for payment.
Work with the AM to set up the selected conference app (including speaker information, sponsors and exhibitors, surveys, schedule, floor plan(s), and venue information).
Review and make corrections to information uploaded to the conference app.
Work with a plant vendor to ensure adequate “dressing” of the keynote stage.

Conference Events
Research and secure venue for social events (including President’s Dinner, Welcome Reception, and Monday Night Networking Event). Note: The Welcome Reception and Monday Night Networking Event are typically held at the conference hotel.
Coordinate with President the venue selection for the President’s Dinner; work through contracting, menu planning, and transportation as needed.
Assist President with purchase, preparation, and deliver of board gifts that will be given at the President’s Dinner.
Planner will attend the President’s Dinner to ensure proper service is provided and assist as needed.

Post-Conference Wrap-up
Participate in the post-conference board meeting to discuss key takeaways.
Prepare overall conference report, review and evaluate conference events and sessions, and make recommendations for improvement.
Within thirty (30) days post-conference, prepare and provide detailed post-conference reports including but not limited to: registration (by entity type), total attendance, session attendance, and food events – guarantees vs attended (based on ticket count).
Prepare and provide a final Sponsors and Exhibitors Sales Report.
Within forty-five (45) days post-conference, utilize Texas PRIMA's Survey Monkey account to conduct and summarize session evaluations, the post-conference overall attendee evaluations, and sponsor/exhibitor evaluations.
Edit all recordings from the conference and provide edited videos to the AM for posting in Texas PRIMA's Members Only virtual environment.

PROPOSAL GUIDELINES

PROPOSAL REVIEW: All proposals will be reviewed and rated by the Texas PRIMA Evaluation Committee. Texas PRIMA reserves the right to accept other than lowest cost proposals and to reject any or all proposals or parts thereof. Service providers not selected for contract negotiations shall be notified in writing no later than December 18, 2026. Late submissions will not be reviewed.

FORMAT: Proposals should be prepared in a professional manner, providing a complete and detailed description of the proposed program. Emphasis should be placed on clarity of content and completeness.

All proposals MUST be received by the deadline noted. Submit one electronic copy in PDF format to Jason Hardy at jhardy@irvingtx.gov AND copy info@texaprima.org with a maximum of fifteen (15) pages. The subject line of the email should read "Response to Texas PRIMA Conference and Exposition Management Planner RFP". Proposals received after the deadline will not be considered. All attachments identified in the RFP must be included. Proposals that do not provide adequate responses to all sections of the RFP may be disqualified from the review and selection processes.

The proposal shall include the following sections:

1. Executive Summary: Summary of the Planner's background, past experiences similar to the services expected for the Conference, basic understanding of the services required, and reasons why the Planner should be selected.
2. Company Overview: Overview of the Planner's business organization structure, including the following:
    a. Proof that the Planner's organization is registered and qualified to do business in Texas

b. Total full-time and part-time employees of the Planner's organization and a listing of any subcontractors required to fulfill the scope of services

c. Whether the Planner has been involved in any disputes with former or current employees and/or vendors (if the matter is settled and is confidential, please provide a general description of the basis of the dispute)

d. Whether the Planner has been involved in a dispute with one of its clients regarding event planning services (if the matter is settled and is confidential, please provide a general description of the basis of the dispute)

e. Total number of events substantially similar to the service requested during the past five years

f. Whether the Planner has experienced any significant organizational developments (e.g. merger, reduction, acquisition, etc.) during the past five years

3. Conference Planning Team: Name and short biography of each individual who will be involved with the Conference and their role before, during, and after Conference.

4. Fees: Provide one (1) proposed project-based fixed annual fee for each of the three (3) contract years, including a description of all costs and fees the Planner proposes to charge Texas PRIMA.

5. References: List of at least three (3) events (preferably in Texas), substantially similar to the Conference, including: 1) description of the event (including size, format, type of guests hosted, stage settings built, etc.), and 2) references for each organization for whom the Planner has performed similar event planning services (name, address, email, and phone number).

6. Samples: Samples of previous work related to the services required (e.g., conference final report, event production timeline with pre/during/post deliverables, promotional material, event budgets which includes all anticipated costs and fees, project plans, photos, etc.).

7. Other Information: Any additional information Planner believes will be relevant to the RFP and the Planner's capability to provide the services.

8. Signature: The original proposal must be signed by the agency official authorized to submit the proposal and enter into contract negotiations for the organization.

QUESTIONS: All questions or concerns related to this RFP must be submitted electronically to Jason Hardy at jhardy@irvingtx.gov and MUST copy Texas PRIMA's email, info@texasprima.org. Written questions will be accepted until 5:00 PM CST on November 9, 2026. Written responses to questions will be emailed no later than November 16, 2026.

INTERVIEWS/PRESENTATIONS: Texas PRIMA reserves the right to request that Proposer(s) provide a final presentation at a scheduled meeting in person or virtually. No Proposer may attend the presentation of any other Proposer. If necessary, Proposers may be scheduled for more than one presentation, demonstration, or interview.

PROPOSAL EVALUATION: A qualified proposal is one that conforms to this RFP and adequately addresses the goals and scope of work desired.

Evaluation factors:

1. Technical Expertise – Proposer's specialized knowledge and ability to use tools, technologies, processes, and techniques to meet the requirements noted herein
2. Experience with Similar Work – Proposer's experience in performing projects of a similar size, scope, and complexity over the past five (5) years and how closely that experience matches the requirements noted herein. Proposer shall set forth in detail their expertise related to planning and managing a conference, promoting and marketing a conference, managing conference registration, and managing a budget for a conference.
3. Reasonability of Cost – Cost will be considered in conjunction with level of experience and ability to provide services.

The evaluation of technical responses will be accomplished using the adjectival scoring method, for which definitions are provided below:

Outstanding (O): Significantly exceeds and/or addresses all elements of the evaluation factor. The proposer has clearly demonstrated an understanding of all aspects of the requirements to the extent that timely and highest quality performance is anticipated.

Exceeds (E): Fully meets and/or addresses all elements of the evaluation factor and significantly exceeds many of the elements of the evaluation factor. The areas in which the proposer exceeds the requirements are anticipated to result in a high level of efficiency, productivity or quality.

Acceptable (A): Meets and/or addresses all elements of the evaluation factor. With respect to the evaluation factor, the response is considered complete, comprehensive, and exemplifies an understanding of the scope and depth of the requirements as well as the proposer's understanding of the requirements.

Unacceptable (U): With respect to the evaluation factor, the technical response has many deficiencies and/or gross omissions and does not adequately address the evaluation factor.

Each proposer should carefully examine the entire RFP and familiarize themselves with all requirements prior to submitting a proposal to ensure the proposal meets the intent of this RFP.

Before submitting a proposal, each proposer is responsible for making all investigations and examinations that are necessary to ascertain conditions affecting the requirements of this RFP.

Failure to conduct such investigations and examinations shall not relieve the proposer from the obligation to comply with all provisions and requirements of the RFP. Responding organizations should ensure that proposals are prepared in compliance with the requirements.

CONTRACTING DETAILS

CONTRACT NEGOTIATIONS: Proposers who submit selected proposals will be required to participate in formal contract negotiations. The award of any contract or agreement shall be contingent upon the satisfactory completion of contract negotiation.

CONTRACT TERM: It is anticipated the contract will be for one (1) year, commencing January 1, 2027, until December 31, 2027, with two (2) one-year options to renew, for a total contract term of three (3) years. Texas PRIMA reserves the right to modify the contract term. Agreements are subject to extension, renewal and/or termination throughout the duration of the Agreement. Additionally, if the service provider's performance is found to be unacceptable, Texas PRIMA may choose not to continue funding the vendor for the follow-up period and reserves the right to grant the follow-up funding to another contractor to complete.

RISK AND LIMITS OF LIABILITY: Selected Proposer shall maintain the following insurance coverages and limits of liability:

Coverage	**Limits of Liability**
Workers' Compensation	Statutory
Employer's Liability	• Bodily Injury by Accident $1,000,000 (each accident) • Bodily Injury by Disease $1,000,000 (policy limit) • Bodily Injury by Disease $1,000,000 (each employee)
Commercial General Liability: Contractual Liability, Bodily and Personal Injury, Products and Completed Operations, and Property Damage	• $1,000,000/per occurrence/aggregate • $1,000,000 for Products & Completed Ops
Automobile Liability	$1,000,000 combined single limit for: • Any Auto or • All Owned, Hired, and Non-Owned Autos
Professional Liability	$1,000,000 per occurrence; $2,000,000 aggregate

All policies shall be endorsed, and certificates of insurance shall reflect the following:

1. Texas PRIMA and its Board of Directors listed as Additional Insured
2. Waiver of Subrogation in favor of Texas PRIMA

3. 30-day Notice of Cancellation in favor of Texas PRIMA

Certificates, Endorsements, and Notifications naming Texas PRIMA as Additional Insured, granting Waivers and providing Notice of Cancellation shall indicate:

Texas PRIMA
P.O. BOX 92373
Austin, Texas 78709

Selected Proposer may self-insure for any insurance that is required herein, only after Texas PRIMA reviews and approves such self-insurance status. Any requests for reductions in limits or waiver of any insurance requirements will be approved by Texas PRIMA only.

GOVERNING LAW: The laws of the State of Texas, and where applicable, federal law and regulation, will govern the contract awarded pursuant to this RFP. Venue for any disputes relating in any way to the contract awarded pursuant to this RFP shall lie exclusively in Travis County, Texas.