REQUEST FOR PROPOSALS

PATHWAYS TO HOPE

2027 Conference Planning and Management Services

Issued by NAMI Greater San Antonio

1. RFP Summary

Item	Details
Solicitation	Conference planning and management services for Pathways to Hope 2027
Event Format	One-day, in-person conference with an in-schedule recognition event
Event Date	August 20, 2027 (tentative)
Venue	Henry B. Gonzalez Convention Center (tentative)
Expected Attendance	Approximately 1,000-1,200 attendees, subject to venue capacity and final registration strategy
Anticipated Program Scale	Approximately 35–40 sessions, including plenaries and breakout sessions; approximately 80–110 presenters; exhibitor/resource area; sponsors; and volunteers
Contract Term	January 25, 2027–September 15, 2027, including kickoff, conference delivery, CEU coordination, reconciliation, reporting, and closeout

NAMI Greater San Antonio invites qualified firms and consultants to submit proposals for comprehensive planning, management, and execution of the 2027 Pathways to Hope Conference. The selected contractor will work with the organization and designated conference leadership to deliver a coordinated, accessible, fiscally controlled, and mission-aligned one-day event.

2. Background and Conference Purpose

Pathways to Hope is a free, community-wide mental health conference that convenes professionals, educators, justice-system representatives, law enforcement, faith leaders, caregivers, community organizations, and people with lived experience. Its purposes include reducing stigma, engaging faith communities, connecting attendees with resources, strengthening collaboration, and promoting community inclusion. https://www.pathwaystohope.us/

The 2026 conference reported 1,658 attendees, 107 speakers, 85 volunteers, 37 sessions, and 35 community partners. Participant feedback and leadership review identified valued programming and priorities for clearer CEU processes, stronger venue and capacity planning, improved parking and wayfinding, earlier youth engagement, bilingual and culturally relevant outreach, disciplined speaker management, real-time program updates, and stronger financial controls.

For planning purposes, bidders should anticipate a conference program of approximately 35–40 total sessions, including plenary and breakout offerings, approximately 80–110 presenters, an exhibitor and community-resource area, sponsorship activations, and significant volunteer engagement. Final program design and attendance projections will be confirmed with conference leadership during project planning.

3. 2027 Objectives and Guiding Priorities

The following objectives are listed in approximate order of organizational priority and will guide planning, decision-making, tradeoffs, and resource allocation throughout the project:

- Apply documented budget controls, approval thresholds, contract management, and change-control procedures.
- Deliver a high-quality one-day conference inclusive of a recognition event for a limited audience that is substantially smaller than total conference attendance.
- Preserve strong workshops, plenary content, networking, practical local information, faith-community engagement, and meaningful lived-experience participation.
- Align programming with treatment access, justice and public safety, recovery and resilience, youth and family needs, practitioner education, and cross-sector coordination.
- Provide clear CEU instructions, attendance documentation, signage, and troubleshooting support.
- Improve registration, parking, capacity, maps, signage, accessibility, food and water communication, schedule flow, and real-time announcements.
- Use coordinated English- and Spanish-language outreach and culturally specific engagement.
- Produce consistent impact, financial, sponsor, exhibitor, speaker, and lessons-learned reporting.

4. Scope of Services

Bidders must identify services included in the base fee, optional services, and third-party pass-through costs. The final division of responsibilities will be confirmed during contracting.

4.1 Project Governance and Management

- Designate a contractor senior project lead and contractor day-to-day project manager.
- NAMI Greater San Antonio will separately designate its project leadership and approval authorities. Contractor personnel may coordinate work but may not obligate NAMI Greater San Antonio financially or contractually.
- At kickoff, develop a responsibility and approval matrix covering budgets, contracts, vendors, speakers, compensation, sponsorships, communications, program decisions, and event operations.
- Maintain a master work plan, responsibility matrix, decision log, risk register, milestone schedule, and single source of truth.
- Facilitate planning meetings monthly through May 2027 and bi-weekly from June through the conference date, with additional closeout meetings as needed. Provide status, budget, risk, and decision reports.
- Coordinate staff, leadership, volunteers, partners, vendors, speakers, sponsors, exhibitors, and venue personnel.

4.2 Venue and Logistics

- If needed, compare conference-ready venues based on capacity, accessibility, parking, breakout configuration, audiovisual capability, catering terms, cost, and attendee experience.
- Coordinate room sets, capacities, floor plans, traffic flow, registration, exhibitors, speakers, parking, security, cleaning, internet, power, furniture, signage, and wayfinding.
- Coordinate catering and clearly communicate what food and beverages, if any, are included for attendees; identify separate arrangements for the limited-attendance recognition event; and communicate venue food, beverage, water, parking, and access policies before registration.
- Develop emergency, weather, incident-response, evacuation, medical-support, and continuity plans.

4.3 Program and Schedule

- Develop a one-day program architecture and detailed run of show.
- Coordinate plenaries, workshops, panels, networking, exhibitors, breaks, lunch, wellness or reflection activities, and closing elements.
- Assign rooms based on expected demand and capacity.
- Ensure plenaries and panels provide clear context and accessible language.

- Keep website, registration, mobile app if used, print, signage, and run of show aligned.

4.4 Registration, Attendee Services, and CEUs

- Administer registration forms, communications, reports, waitlists, cancellations, accessibility requests, and privacy-conscious data handling.
- Manage advance and on-site registration, badges, help desk, attendance counts, and attendee support.
- Create a one-page CEU guide and coordinate eligibility, measurable objectives, sign-in/sign-out, attendance verification, certificates, documentation, and troubleshooting with designated CEU providers. Anticipated disciplines may include counseling, social work, psychology, nursing, education, peer support, and related professions; final offerings and provider requirements will be confirmed by NAMI Greater San Antonio.
- Provide maps, parking, food and water information, capacity notices, and day-of updates.
- All attendee, speaker, sponsor, volunteer, exhibitor, registration, CEU, and survey data collected under the contract shall remain the sole property of NAMI Greater San Antonio. Contractor use is limited to contract performance. The contractor may not retain, sell, distribute, disclose, or use such data for unrelated purposes without prior written authorization and must return or securely destroy data at closeout as directed.

4.5 Marketing and Communications

- Develop an integrated plan for email, referral, social media, partner outreach, earned media, presenter promotion, and post-event assets.
- Coordinate English- and Spanish-language outreach and culturally relevant community and faith-community engagement.
- Create or coordinate accessible digital and print collateral.
- Publish approved program changes immediately through digital channels.
- Develop targeted strategies for youth, families, practitioners, lived-experience communities, faith communities, and partners.

4.6 Sponsorship and Exhibitors

- Develop a sponsorship and exhibitor structure appropriate for a one-day conference with no pre-conference dinner benefits.
- Prepare prospect materials, benefit matrices, agreements, invoices, tracking, fulfillment, and communications.
- Coordinate applications, payments, assignments, setup, day-of support, and closeout.

4.7 Volunteers and On-Site Management

- Develop staffing, volunteer roles, schedules, training, check-in, communication, and escalation tools.
- Provide an experienced on-site lead and sufficient staff for registration, speakers, rooms, exhibitors, sponsors, volunteers, attendees, and incidents.
- Conduct briefings, site walks, rehearsals, and a post-event operational debrief.

4.8 Budget and Financial Controls

- Maintain a detailed budget with committed, projected, paid, in-kind, and variance fields.
- Obtain quotes when requested and document recommendations.
- Do not obligate funds without written authorization.
- Maintain contract, invoice, deposit, cancellation, reimbursement, and payment trackers.
- Forecast cost pressure and change-order impacts before approval; complete final reconciliation.

4.9 Accessibility and Participant Support

- Plan physical, communication, sensory, language, and digital accessibility.
- Coordinate requested accommodations, interpretation, accessible seating or space, and access information.
- Help design visible participant support or navigation resources.

4.10 Post-Conference Closeout

- Support feedback tools for participants, presenters, sponsors, exhibitors, volunteers, and partners.
- Deliver registration, CEU, communication, sponsor, exhibitor, budget, issue, and operational reports.
- Submit prioritized lessons learned and transfer editable source files, contracts, trackers, reports, templates, and final assets by September 15, 2027.

5. Speaker Submission, Selection, and Contracting Process

The bidder must describe its system, staffing, tools, schedule, and controls for the following process. Final program selection, budget approval, and contract execution authority remains with NAMI Greater San Antonio or its authorized designee.

5.1 Call for Presentations and Invitations

- Draft the call, eligibility rules, formats, track guidance, criteria, presenter expectations, compensation policy, and deadlines for approval.
- Administer an accessible online submission and inquiry process.
- Apply equivalent documentation and approval controls to invited plenary speakers.

5.2 Required Submission Information

- Collect title, track, format, abstract, intended audience, takeaways, presenter contacts, biographies, qualifications, and headshots.
- For CEU-eligible content, collect measurable objectives, timed outline, qualifications, and required supporting information.
- Collect technology, room, accessibility, interpretation, recording, travel, schedule, conflict, commercial-interest, and compensation information.
- Identify lived-experience involvement, community relevance, cultural responsiveness, bilingual delivery, and local resource connections when applicable.

5.3 Screening, Review, and Selection

- Screen for completeness, eligibility, CEU readiness, feasibility, duplication, and compliance.
- Prepare reviewer instructions, conflict disclosures, scoring forms, and consolidated recommendations.
- Evaluate mission alignment, community relevance, audience value, objectives, qualifications, practical application, inclusion, accessibility, cultural responsiveness, program balance, and feasibility.
- Maintain accept, alternate, revise, and decline decisions in a selection log.

5.4 Notification and Conditional Acceptance

- Issue approved notices and response deadlines.
- State that placement is conditional until documents are complete and an agreement is executed.
- Release unconfirmed slots to approved alternates.

5.5 Presenter Agreements

- Use an organization-approved agreement or participation letter.
- Address session scope, date, duration, deliverables, responsibilities, compensation, travel, lodging, reimbursement, payment, tax/vendor documents, and maximum authorized amount.
- Address recording, streaming, photography, promotional use, accessibility-ready materials, intellectual property, confidentiality if applicable, conduct, venue restrictions, sales limitations, cancellation, substitution, force majeure, and change control.
- Obtain program and budget approvals before signature; make no public or financial commitment before execution.

5.6 Onboarding and Deliverables

- Assign one contact and track agreements, biographies, headshots, promotion, CEUs, slides, handouts, accessibility, travel, registration, technology, and check-in.
- Provide toolkits, reminders, venue requirements, day-of instructions, promotion assets, and escalation contacts.

5.7 Changes and Cancellations

- Require written changes to presenters, titles, descriptions, formats, objectives, schedules, compensation, travel, technology, or deliverables.
- Document content, operational, and financial approvals and amendments.
- Apply an approved final-change deadline of August 12, 2027.
- Communicate changes immediately through digital channels, staff briefings, signage, and attendee communications.

5.8 Check-In, Payment, and Closeout

- Operate presenter check-in and support.
- Confirm delivery and documentation before approved payment or reimbursement.
- Retain submissions, reviews, agreements, amendments, deliverables, payments, and closeout records.
- Collect presenter feedback and report results.

6. Required Deliverables and Milestones

Approval titles in this table refer to designated NAMI Greater San Antonio representatives unless expressly identified as contractor roles. Final assignments will be documented in the kickoff responsibility and approval matrix.

Deliverable	Minimum Content	Target Due	Approval
Kickoff and project charter	Governance, contacts, responsibilities, communications	January 25, 2027	NAMI Greater San Antonio
Master plan and budget	Work plan, milestones, risks, budget, procurement tracker	February 8, 2027	NAMI project lead
Sponsor and exhibitor plan	Packages, prospectus, agreements, fulfillment	February 22, 2027	NAMI authorized lead
Venue and logistics plan	Venue, capacity, layouts, parking, accessibility	March 1, 2027	NAMI project lead
Program and speaker plan	Architecture, call, rubric, agreements, tracker	April 5, 2027	NAMI program leadership
Registration and CEU plan	Platform, forms, communications, policies, disciplines/providers, documentation	April 19, 2027	NAMI project lead
Marketing plan	Audience strategy, English/Spanish calendar, assets	June 7, 2027	NAMI communications lead
Final operations plan	Run of show, staffing, rooms, incidents, rehearsals	July 12, 2027	NAMI conference leadership

Deliverable	Minimum Content	Target Due	Approval
Post-event closeout	Reconciliation, CEUs, metrics, surveys, files, lessons learned	September 15, 2027	NAMI Greater San Antonio

7. Anticipated Organization Responsibilities

- Identify authorized project leadership, decision-makers, and signature authority.
- Approve goals, budget, program, brand, venue, vendors, speakers, compensation, contracts, and public communications.
- Provide available historical files, brand assets, partner contacts, policies, and the 2026 lessons-learned summary.
- Participate in meetings and make timely decisions.
- Execute contracts and make approved payments unless otherwise stated.
- Confirm responsibility for fundraising, sponsor solicitation, CEU accreditation, media, creative production, volunteers, and participant support.

8. Procurement Schedule and Communications

Milestone	Date / Time (Central Time)
RFP issued	November 9, 2026
Optional bidder conference	November 20, 2026, 12:00 p.m. -1:00 p.m. via Zoom
Written questions due	November 30, 2026 by 5:00 p.m.
Addendum issued	December 4, 2026
Proposal deadline	December 9, 2026 by 5:00 p.m.
Interviews, if held	December 14–18, 2026
Notice of intent to award	January 5, 2027
Contract execution target	January 18, 2027
Kickoff / contract term begins	January 25, 2027

8.1 Questions

Submit written questions to pathwaystohope@nami-sat.org with the subject “Pathways to Hope 2027 RFP Question.” Responses may be issued to all known bidders by addendum. Oral explanations are not binding unless incorporated into a written addendum. Register for optional bidders conference by sending email to pathwaystohope@nami-sat.org no later than November 19, 2026 by 5:00 p.m. CT. Zoom link will be sent to registrants.

8.2 Proposal Submission

Submit proposals by December 9, 2026 at 5:00 p.m. CT by email to pathwaystohope@nami-sat.org. Label the submission “Pathways to Hope 2027 Conference Planning and Management Proposal.”

- Format: one searchable PDF inclusive of a fee schedule.
- Narrative limit: 10 pages excluding cover, resumes, references, forms, and appendices.
- Proposal validity: 60 calendar days.

9. Required Proposal Content

- Signed cover letter with legal name, address, contact, and addenda acknowledgment.
- Executive summary and understanding of the one-day conference.
- Firm profile, ownership, years in business, locations, and certifications.
- Comparable experience with conferences, nonprofit/community events, CEUs, accessibility, bilingual outreach, sponsors, exhibitors, and high-volume attendees.
- Project team, roles, availability, resumes, subcontractors, and organization chart.
- Detailed approach to every scope section, including speaker submission and contracting.
- Schedule, meeting cadence, tools, risk controls, quality assurance, change control, and reporting.
- Technology platforms, data-security practices, data retention, ownership, acceptable use, return, and destruction procedures.
- Three comparable references completed within five years.
- Completed pricing, assumptions, exclusions, optional services, pass-through costs, travel, taxes, payment schedule, cancellation terms, and out-of-scope rates.
- Sample project plan, run of show, budget tracker, speaker agreement, communications plan, sponsor tracker, and closeout report.
- Conflicts, litigation, terminations, or material disputes within three years.
- Exceptions to RFP and contract terms.
- Required certifications and forms.

10. Pricing Schedule

Provide a transparent not-to-exceed proposal. Separate professional fees from third-party and reimbursable costs. Do not assume authority to commit organizational funds. Price the limited-attendance recognition event separately from services and costs applicable to total conference attendance.

Cost Component	Fixed Fee	Pass-Through	Optional	Assumptions / Exclusions
Project management	$[ ]	$[ ]	[YES/NO]	[ ]
Venue and logistics	$[ ]	$[ ]	[YES/NO]	[ ]
Program and speakers	$[ ]	$[ ]	[YES/NO]	[ ]
Registration and CEUs	$[ ]	$[ ]	[YES/NO]	[ ]
Marketing and communications	$[ ]	$[ ]	[YES/NO]	[ ]
Sponsors and exhibitors	$[ ]	$[ ]	[YES/NO]	[ ]
On-site staffing	$[ ]	$[ ]	[YES/NO]	[ ]
Awards / recognition event	$[ ]	$[ ]	[YES/NO]	[ ]
Post-event reporting	$[ ]	$[ ]	[YES/NO]	[ ]

Cost Component	Fixed Fee	Pass-Through	Optional	Assumptions / Exclusions
Travel and reimbursables	$[ ]	$[ ]	[YES/NO]	[ ]
Technology/platforms	$[ ]	$[ ]	[YES/NO]	[ ]
Optional services	$[ ]	$[ ]	[YES/NO]	[ ]
Total not-to-exceed	$[ ]	$[ ]		[ ]

11. Evaluation and Selection

Criterion	Weight	Evidence
Technical approach and relevant experience	30%	One-day strategy, methodology, controls, comparable work, outcomes, and references
Project team and capacity	20%	Qualifications, roles, availability, staffing depth, and ability to support projected scale
Speaker submission and contracting	15%	Review process, CEUs, agreements, onboarding, changes, and controls
Attendee experience, accessibility, and communications	10%	Registration, CEUs, bilingual outreach, navigation, and participant support
Budget and financial controls	15%	Reasonableness, transparency, approval controls, forecasting, and change management
Interview or work samples	10%	Clarity, fit, examples, and demonstrated execution capability

NAMI Greater San Antonio may request clarifications, interviews, presentations, best-and-final offers, or reference checks.

Award may be made for best overall value, not necessarily lowest price.

Scope, staffing, schedule, deliverables, price, and terms may be negotiated before award.

Appendix A. 2026 Conference Lessons Learned and Improvement Priorities

The following summary is provided to give bidders practical context for 2027 planning. Detailed source materials may be made available to the selected contractor or during procurement as determined by NAMI Greater San Antonio.

- CEUs: Simplify instructions, clarify eligible disciplines and provider requirements, strengthen attendance verification, and improve certificate troubleshooting.
- Capacity and venue: Use reliable room-capacity planning, demand forecasting, parking guidance, accessible routes, and wayfinding.
- Program and speakers: Begin speaker coordination earlier; maintain firm deadlines, agreements, content requirements, and real-time schedule updates.
- Attendee communications: Clearly communicate parking, maps, food and water availability, accessibility, schedule changes, and capacity limitations.

- Youth, family, and cultural engagement: Begin outreach earlier and expand bilingual, culturally relevant, family-focused, and youth-focused strategies.
- Volunteers and on-site operations: Define roles, training, check-in, escalation, and room support in advance.
- Financial controls: Maintain current budgets, approval thresholds, procurement records, contract and invoice tracking, and documented change control.
- Data and reporting: Protect organizational ownership of data and deliver complete, editable registration, CEU, sponsor, exhibitor, financial, survey, and lessons-learned records.