

# Request for Proposal

The Financial Planning Institute of Southern Africa  
2022 FPI Professionals Convention  
**PROPOSALS DUE BY: 31 January 2022**

## Company Background

The Financial Planning Institute of Southern Africa (FPI) is a South African Qualifications Authority recognised professional body for financial planners in South Africa. It is the only institution in South Africa to offer the CFP® certification and has been approved by the South African Revenue Service (SARS) as a Recognised Controlling Body (RCB).

As a non-profit professional body, founding and affiliate member of [Financial Planning Standards Board \(FPSB\)](#), the Institute exists to improve the level of professionalism and positively influence the quality of advice provided by its members. There are 25 other affiliate member countries who offer the CFP® certification.

In 2012, FPI was highly commended by FPSB and awarded Tier 1 Affiliate Status for receiving 96% in the global assessment. This is the highest achievement any affiliate has ever received.

### *Vision*

Professional financial planning and advice for all.

### *Mission*

The FPI's mission is to advance and promote the pre-eminence and status of financial planning and advice professionals, while at all times acting in the interests of the society (community, constituency) whom the profession serves, by:

1. Improving the quality and accessibility of professional financial planning and advice for all in Southern Africa;
2. Acting as advocate for the financial planning profession and professional financial advice, building a recognition of the importance and need for such planning and advice by the general public;
3. Providing a framework within which members can achieve qualifications and maintain competence to create greater value for their clients, practices and employers;
4. Ensuring that members maintain the highest ethical standards in the pursuance of their profession;
5. Taking a leadership role within financial services by providing balanced, credible input and commentary to government and the public and
6. Facilitating diversity and inclusion within the financial planning profession and professional financial advice space.

Our mission is to advance and promote the pre-eminence and status of financial planning professionals, while at all times acting in the interests of the society whom the profession

serves.

### *Our Strategic Objectives*

We strive to remain a pre-eminent financial planning standards authority for competent, ethical financial planners in South Africa and uphold the integrity of the CFP® certification. Read more by downloading our [strategic brochure](#).

## **Request for Proposals**

The FPI is sourcing a service provider to deliver on all project goals relating to a physical and virtual event within the stipulated timelines and SLA/KPI's.

## **Project Overview**

The Financial Planning Institute of Southern Africa has a proud history of hosting the FPI Professionals Convention which is regarded as the largest and most significant event in the calendar of financial planning professionals. The event hosts some of the best local and international speakers focusing on topics that present value to South Africa's financial planners, advisors, and the customers we serve.

2022 will mark the 33<sup>rd</sup> occasion that the FPI will be hosting this event and is deemed to be our flagship event. The event attracts between 800 to 1200 delegates, including exhibitors and sponsors each year and is advertised on various media platforms.

In light of the current Covid 19 conditions, the FPI is planning to host the annual Convention as a hybrid event which will consist of a face-to-face event coupled with a livestreaming online. This event is scheduled to take place on the 19<sup>th</sup> and 20<sup>th</sup> of October 2022.

## Project Goals

The goals of this project include:

- Provide a project plan for the FPI Professionals Convention
- Host the FPI Professionals Convention on the 19<sup>th</sup> and 20<sup>th</sup> of October 2022
- Project deliverables to be completed within the scheduled timeframe
- Project to be completed within the scheduled budget
- Project to maintain the same level of quality as previous years
- Project targets to be achieved i.e., Sponsorship, Ticket sales and Exhibition sales
- Maintain a high level of delegate satisfaction and user experience

To reach these goals, The Financial Planning Institute of Southern Africa is now accepting bids in response to this Request for Proposal.

## Scope of Work

The FPI Professionals Convention will be hosted as a hybrid event in 2022. The FPI requires an event management company to be able to manage a face-to-face event that is livestreamed online.

The FPI Gala Dinner/Awards will be held face to face on the evening of the 19<sup>th</sup> of October 2022 and management of all event logistics and technical requirements are needed.

## Requirements

### Budget and Cost Management

- Prepare and submit a detailed budget for Convention
- Prepare and submit a detailed budget for FPI Gala Dinner/Awards
- Will be required to provide the FPI with quotations and invoices in line with our procurement policy. All payments to suppliers will be facilitated by the FPI.
- Manage all suppliers as per contractual obligations on behalf of FPI
- To submit a payment plan of suppliers to FPI
- Manage budget accordingly
- Ongoing progress and budget meetings to be held to discuss project deliverables

### Speaker management

- Travel arrangements (where applicable)
- Manage and facilitate logistics around speaker slots according to programme
- Manage delivery dates for required content/presentations
- MC Management for Convention and FPI Gala Dinner/Awards
- Procurement of speaker gifts

### Sponsors and Exhibitors

- Manage and facilitate logistics around sponsors
- Manage and facilitate sale/s of exhibition stands/shell schemes
- Design and management of exhibition space including floor plan layout and stand allocation

### Venue management

- Possible procurement of a venue in terms of the FPI venue specifications
- Manage and facilitate venue booking
- Arrange for venue agreement to be drawn up
- Manage and facilitate catering requirements for Convention and the FPI Awards/Gala dinner
- Manage all AV and staging requirements for Convention and the FPI Awards/Gala Dinner
- Procurement and management of CPD (Continuous Professional Development) tracking system
- Manage registration desk according to CPD requirements
- Manage and maintain Covid 19 protocols with venue management

### Signage and marketing collateral

- To liaise with the FPI marketing department regarding possible venue restrictions and branding opportunities
- Manage set up of branding at the venue

### General

- Supply a master project file for the Convention that will keep the project owner up to date on the progress throughout the project
- Procurement of delegate bags
- Procurement of lanyard and name badges
- Procurement of photographer for the Convention and FPI Awards/Gala Dinner

### Virtual event

- Supply a master project file that will keep the project owner up to date on the progress throughout the project
- Virtual platform hosting
- Virtual conference set up
- AV, staging and lighting

- Filming at the venue
- Production and technical support
- Internet connectivity

### Existing Roadblocks or Technical Issues

The FPI has encountered the below roadblocks/technical issues in the past. Please indicate a solution should any of these occur.

Roadblock or technical issue	Solution
1. Live feed channel being able to accommodate the expected number of delegates at the virtual event.	
2. In the event of a network failure, what is your back up?	
3. Online engagement hub for delegates of the virtual event	
4. Online engagement capability for exhibitors and sponsors to engage with delegates	
5. Rolling screens/banners to promote exhibitors and sponsors	
6. Online Support for delegates	
7. Online Support for FPI Staff	
8. Delegate tracking for the virtual event in order to ensure correct allocation of CPD points	



## Evaluation Metrics

The Financial Planning Institute of Southern Africa will evaluate bidders and proposals based on the following criteria:

- Full service offering
- Previous experience/past performance history
- Referrals and feedback from previous projects
- Projected costs
- Experience and technical expertise
- BBBEE Status
- Tax compliance
- Provide a details itemised budget

## Submission Requirements

Bidders must adhere to the following guidelines to be considered:

- Only bidders who meet all metrics requirements in the evaluation section should submit a proposal.
- Proposals must be submitted by 16h00 on 31 January 2022 via email to Adele Whyte [adele.whyte@fpi.co.za](mailto:adele.whyte@fpi.co.za)
- Include samples and references with your proposal.
- A proposed schedule must also be included and clearly expressed.

## Contact Information

For questions or concerns connected to this RFP, we can be reached at:

Contact person: Adele Whyte (HOD: Membership Hub)

Contact email: [adele.whyte@fpi.co.za](mailto:adele.whyte@fpi.co.za)

Contact phone: (011)470-6024