



# REQUEST FOR PROPOSAL FOR EVENT PLANNER

## **Overview**

The Women's Foundation of the South ("WFS") is seeking a qualified and experienced event planner ("Event Planner") to manage the execution of WFS's Rooted Retreat ("Retreat"), to be held from December 4-7, 2025, in Puerto Rico. The Event Planner's services include, but are not limited to, concept development, planning, event production, and overall event management coordination, including day-of-event coordination, budget management, speaker and resource personnel management, attendee management, programming, and implementation. For more detailed information, see SECTION IV. SCOPE OF WORK of this Request for Proposal ("RFP") below.

## **Organizational Information**

WFS is a 501(c)(3) nonprofit organization founded in 2021 that is committed to building the health, wealth, and power of womxn and girls of color in the US South. We say "womxn" (pronounced "women") to intentionally include women of trans experience and gender nonconforming people.

## **Event Description**

The WFS Rooted Retreat will be a three-day gathering from December 4-7, 2025, for our 113 grantee partners across Texas, Louisiana, Mississippi, Georgia, Alabama, and Arkansas. Our grantee partners are change agents in their communities who draw on resident wisdom and innovation to lead critical work such as:

- Providing public healthcare, mental health care, and maternal health care in and near healthcare deserts;
  - Conducting asset-building work such as credit counseling, homeownership support, and coop development to help build wealth and/or alleviate poverty;
  - Building power and advocacy across multiple issue areas from climate change to reproductive rights to create more just communities.
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At this retreat, WFS will create a haven for our grantee partners who daily put the work and needs of the community before their own. We aim to build their awareness of health, their own wellbeing, and strengthen the divine feminine within them as a tool of healing and leadership.

The goals of the summit will be to:

- Increase their awareness and attention to their own health and wellbeing;
- Give them new tools to invest in their integrative health including yoga, meditation, movement, and other wellness practices;
- Further build community so that they build new allies and supports as they strengthen their restorative leadership.

Our aim is that these women leaders will become models of how to achieve a healthy balance between the divine feminine and divine masculine to their organizations and the communities that they serve.

We hope to give our grantees access to "health professionals-in-residence" that they can meet for the first time at the Summit but have access to for at least three months after the gathering. These health professionals may include OB-GYN doctors, integrative health specialists, and nutritionists. We also aim to facilitate small group conversations across our three pillars of health, economic security, and power. Finally, we will create space for rest and restoration as well as connection to new thought partners and a network of support across the South, which many of our grantee partners are in critical need of during this challenging time.

## **Scope of Work**

The Event Planner will be responsible for the following tasks:

### **Concept Development**

- Work with WFS to develop a program and schedule for the Rooted Retreat based on the overall theme, vision, and objectives defined by the Women's Foundation of the South.

### **Planning and Plan Execution**

- Develop and lead implementation of a detailed event plan including timelines, milestones, and deliverables.
  - Based on the program, identify and pursue speakers who would help achieve the retreat's vision and objectives. Negotiate contracts with the speakers ensuring that costs fall within budget. WFS must review, issue, and sign all vendor contracts.
  - Identify and pursue health professionals-in-residence and other health and wellness providers (e.g. massage therapists, acupuncturists, etc.). Negotiate and finalize contracts with them ensuring that costs fall within budget.
  - Plan welcome experience for attendees including gifts that will be given to the attendees throughout the retreat. Purchase gift items in line with the approved budget. All purchases must be approved by WFS.
  - Coordinate transportation of attendees from airport to retreat venue.
  - Connect speakers and health professionals-in-residence who are not based in Puerto Rico to the WFS travel agent so that the speakers and health professionals can arrange their travel. Regularly check with travel agent to
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- assess who has not arranged travel yet and follow up with those individuals.
- Plan and execute venue décor in line with the atmosphere that WFS desires to build for the retreat.
- Coordinate with vendors, suppliers, and other stakeholders to ensure all logistics are managed effectively.
- Ensure that the Retreat complies with all applicable laws and regulations.
- Report progress on plans and timeline to WFS regularly.

### Venue Coordination

- Serve as the point of contact for the retreat venue and the hotel where the attendees will be staying. This will most likely be one location. The event planner will communicate any requests and requirements from the venue to the WFS contact and ensure that these requirements and requests are fulfilled (e.g. hotel payments, etc).
- Ensure that food items for the retreat are selected in line with the budget and that there are options for attendees with certain allergies or preferences.
- Develop plans for audiovisual and lighting needs and coordinate these needs with the retreat venue.

### Event Production

- Oversee all aspects of production of the retreat including venue and food setup, audiovisual equipment operation, lighting (if necessary), and decor. Identify vendors for venue set-up, AV equipment, lighting (if necessary), and décor which will ensure a quality retreat experience for the retreat attendees in line with the retreat objectives.
- Test audio visual equipment prior to various parts of the program to ensure that it works properly. Ensure that any speaker presentations work properly prior to the actual presentations, including making sure that sounds and video can be heard and seen by attendees.
- Ensure smooth check-in experience for attendees. Set-up a check-in desk for retreat participants, speakers, and other resource people.
- Serve as the point of contact for speakers, performers, and health professionals involved in the retreat. Coordinate with speakers, performers, and health professionals to ensure the program runs smoothly. Ensure that speakers, performers, and health professionals are where they need to be based on the program schedule.
- Work with WFS to ensure sponsorship benefits are fulfilled.
- Manage submission of all invoices to WFS to ensure payments can be made in a timely manner.

### Event Management Coordination

- Provide day-of-event coordination to ensure all activities are executed as planned.
  - Manage the event budget and ensure all expenses are tracked and reported accurately.
  - Oversee speaker, performer, and health professional management as well execution of programming.
  - Be the “go-to” person during the retreat for attendees, speakers, and resource persons to approach if there are any questions or concerns regarding the retreat.
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- Meet every two weeks for updates and planning from June to October 10 and then weekly from October 13 to December 3. Communicate regularly via email as needed
- Implement all necessary measures to ensure the safety and wellbeing of attendees.

#### Post-Event Follow-Up

- Conduct a post-event evaluation to assess the success of the Summit.
- Provide a detailed report with recommendations for future events.

For questions or more detailed information regarding this RFP, please contact Ella Delio at [ella@womensfoundationsouth.org](mailto:ella@womensfoundationsouth.org).

We look forward to receiving proposals from qualified event planners who are passionate about making a positive impact and supporting the health, wealth, and power of womxn and girls of color in the US South.

#### **Independent Contractor Services Agreement**

This RFP does not constitute a contract. WFS will negotiate an Independent Contractor Services Agreement ("ICSA") with the selected Event Planner.

The ICSA will include customary representations and warranties and confidentiality provisions, including a requirement that the Event Planner will ensure that each of its staff, agents, vendors, and other subcontracted third parties sign confidentiality agreements that are at least as protective of WFS's confidential and proprietary information as those contained in the ICSA. In addition, the selected Event Planner will perform the duties requested as an independent contractor and not as an employee of WFS.

Once the ICSA is fully executed, the Event Planner agrees that it will not accrue additional expenses and will remain on budget. The selected Event Planner does not have the authority to incur expenses on WFS's behalf without WFS's prior written approval.

#### **RFP Format and Guidelines**

- A. Proposals must be received no later than 6:00 p.m. CT on June 11, 2025, via email to [ella@womensfoundationsouth.org](mailto:ella@womensfoundationsouth.org) in a single electronic PDF attachment, with a maximum of 7 pages using 11-point size Times New Roman font with 1" margins. PowerPoints are acceptable with the format restrictions.
  - B. The proposal shall include the following sections:
    1. Executive Summary. Summary of the Event Planner's background, past experiences similar to the services expected for the Retreat, and basic understanding of the services required, and reasons why the Event Planner should be selected.
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2. Relevant Experience of Event Planner . Description of the Event Planner's experience planning similar events. Any experience with planning health and wellness experiences is a plus. business organization structure, including the following:
3. Company Overview
  - o List of each jurisdiction where the Event Planner has been incorporated and is qualified to do business;
  - o Total full-time and part-time employees of the Event Planner;
  - o Whether the Event 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);
  - o Whether the Event 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);
4. Event Planning Team. Name and short biography of each individual who will be involved with the Retreat, if any, and their proposed role before, during and after Retreat.
5. Fees. Proposed project fee, including description of all costs and fees of the Event Planner. This fee is for project management and any travel expenses incurred during the Retreat except for lodging and flight which will be covered by WFS. WFS will also pay for the venue, vendors (including A/V and venue set-up), speakers, and healthcare professionals directly. The budget range for Event Planner Fees is \$15,000-20,000.
6. References. List of at least two (2) events organized by the Event Planner similar to the Retreat, including (1) description of the event (including size of the event, format of the event, type of guests hosted, etc.), and (2) references for these two events whom the Event Planner has performed similar event planning services (Names, Email, and Contact Number).
7. Samples. Sample of previous work related to the Services (e.g. conference final report, event production timeline with pre/during/post deliverables, event budgets which includes all anticipated costs and fees, project plans, photos, etc.).
8. Other Information. Any additional information that Event Planner believes will be relevant to the RFP and the Event Planner's capability to provide the Services.
9. Signature. The proposal must be signed by a representative of the Event Planner that is authorized to commit on behalf of the Event Planner.

### **Proposal Evaluation**

WFS reserves the right to accept or reject any and all proposals, without prior discussions, and grant final acceptance to the proposal that best meets the needs and interests of WFS, in its sole discretion. WFS will be the sole judge of whether a proposal meets the required RFP criteria.

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**Confidentiality Clause**

Any information disclosed by WFS herein (and any related correspondence and/or attachments) is considered confidential and constitutes the proprietary information of WFS. All submission will become the property of WFS and will be treated as confidential between WFS and the Event Planner. WFS will use its commercially reasonable efforts not to disclose the contents of the Event Planner's proposal to other participants or the public. WFS reserves the right to discuss the submissions with its consultants, references provided by the Event Planner, and other related parties during the evaluations process.

**Acknowledgment**

By submitting a proposal, the Event Planner acknowledges that it has read this RFP, understands it, and agrees to be bound by its requirements.

Event Planner understands and agrees that they are solely responsible for their own business expenses, except for pre-approved, reasonable business expenses related to the Retreat, such as travel accommodations. Event Planner agrees to keep their fixed fee and other terms of their engagement open for at least sixty (60) days past the submission deadline.

Once the Event Planner is selected, WFS and the selected Event Planner must execute a contract prior to the selected Event Planner commencing services. The Event Planner agrees that the contract will be a complete and exclusive agreement and will supersede all prior communications between the parties.

Should WFS and the selected Event Planner be unable to agree on the terms of a contract within a reasonable time (at WFS's sole discretion), WFS reserves the right to suspend or terminate negotiations without notice, and to pursue negotiations with another Event Planner. Any suspension or termination of negotiations shall be without liability to WFS or the selected Event Planner(s).

WFS may terminate this process (in its sole discretion) and issue a new RFP for the requested services.

Each Event Planner shall assume all fees and costs (including but not limited to legal fees) incurred in responding to this RFP and negotiating the MSA with WFS. WFS shall bear no liability for any costs, fees, or liability incurred in connection with this RFP or any responses thereto.

Event Planner agrees that it shall not directly contact any WFS Board Members or those who may otherwise have an affiliation with WFS, in connection with responding to this RFP. Event Planners who do not abide by this requirement may be disqualified from the RFP process.

**Questions**

Questions about this RFP should be directed to Ella Delio, VP of Program by email ONLY: [ella@womensfoundationsouth.org](mailto:ella@womensfoundationsouth.org).

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