Appendix B

Basic and Advanced Services

Note: Within this Appendix, the term "event" and any of its logical variants shall be considered to apply equally to courses, programs, events, workshops, conferences, symposia, or any other endeavor for which CPES may supply services and/or support.

BASIC SERVICES provided by CPES consist of the services listed below. ***Note:*** DIRECT COSTS *and* DISCRETIONARY COSTS *associated with or required by any of the* BASIC SERVICES *must be paid by the event.*

- Event Registration
  CPES will provide access to a system that will allow individuals or groups that desire to attend the event to register as attendees and to pay by credit/debit card all registration fees.

  a) Simple online (web-based) registration form/webpage(s) for collection of data defined by the event's organizer, with data stored in a database. The registration form ultimately routes the registrant to CashNet for payment processing; registrant is returned to registration website/webpage for confirmation of successful payment. Payments through CashNet post directly to Banner index, which can be either a CPES or non-CPES account.

  b) A simple webpage is provided to allow the event's organizer to, on demand, download the registration and payment data collected through the time of download. Access to the webpage is restricted to defined users by username/password. Data is downloaded as a file suitable for import into Microsoft Excel.

  c) For successful payment, an email receipt is sent to the customer, and a notification email is sent to a designated address(es) as specified by the event's organizer. A postback notice (email) is sent to the system administrator for use if troubleshooting is required

  d) The data collected, including CashNet transaction information, is stored in a database.

  e) A web application (accessed with a user name and password) is available to the event's organizer to download the registration data as a formatted CSV file.

- Financial Accounting

  a) If registration payments made through CashNet are posted to a Banner account administered by CPES, CPES will assume responsibility for payment, up to the amount of registration payments received, of charges and costs accrued by the event.

  b) Payment of charges and costs accrued by the event that exceed the registration payments received will be the responsibility of the college and/or department associated with the event.

ADVANCED SERVICES provided by CPES consist of the services listed below. ***Note:*** DIRECT COSTS *and* DISCRETIONARY COSTS *associated with or required by any of the* ADVANCED SERVICES *must be paid by the event.*

- Web Management
  In collaboration with the event organizer and with extensive input from the organizer, CPES will produce and host on the Internet a collection of individual but related webpages (a website) containing information pertaining to the event as set forth below. The website will be accessible 24/7/365 world-wide, and will be available to visitors for a period of one (1) year after the conclusion of the event or the last instance of the event in the case of an event series.

  a) Event website based upon a "standard" design, which is suitable for viewing in both desktop and mobile environments

  b) Enhancements of standard design (custom header layout/images, navigation mechanism, page layout, etc.) can be provided . For such enhancements, the event organizer shall provide all necessary content; for example, images, graphics, and verbiage to be used on the webpage(s)

  c) Creation and maintenance of a website for the event that may include information such as:
     1) Program content
     2) Location of the event
     3) Registration information and access to an online registration form

4) Paper information and/or guidance and submittal information
5) Information for non-US (international) attendees, including means to acquire invitation letters
6) Transportation information, including travel to/from the city of the event and transportation options while attending the event
7) Lodging information, including reserved accommodations information if applicable
8) Awards information, such as identification of awards to be presented or solicitation of nominations for awards
9) Identification of sponsors, including display of sponsors' logos
10) Identification of exhibitors, including display of exhibitors' logos
11) Information about the event venue
12) General and/or historical information about the city in which the event is taking place, possibly including information about available activities or points of interest
13) Prior and future events related to or the same as the current event
14) Frequently asked questions about the registration process, the venue, or attendance of the event; does not include information about the event content
15) Identification of separate contacts for event information and for registration assistance
16) Creation and maintenance of a comprehensive online registration form to accommodate a broad range of registrant details, categories, fees, and other information required for the event. Sample data: name, address, phone, fax, email, other details such as pre and post events – spouse programs – meal choices; special options – ADA special needs

17) Additional web pages (about the organization conducting the event, group tours, "on your own" extracurricular activities, venue-specific information, etc)

18) Frequent website modifications and additions

- Event Registration Management

    a) Creation and maintenance of all event "properties" in the event database so that correct information (location, dates, fees, options, special information) is dynamically displayed in the online registration form

    b) Data management of all registrant information (name, address, phone, etc) so as to be available for use to produce name tags, table tents, participant lists, master roster, and other similar items. The data management system will provide real-time access to attendee registration details for CPES staff and the event organizer.

    c) Collection of online payments, checks, wire transfers deposited directly in Mines systems and tied to Banner; includes automatic preparation and sending of invoices and payment reminders for promised payments by checks and wire transfers

    d) Multiple attendee registration types allowed (with provision for fees that vary by type); for example, member/non-member, early/regular/late, multi-person discount, partial attendance, special promo codes for unique discounts

    e) Processing of refunds as required

    f) Automated correspondence with attendee for confirmation materials, receipts, any additional updates to attendees [parking details, venue, venue change, reading materials]

    g) Fielding questions from registrants via email and phone

    h) Preparation of attendee packets to include: participant list, appropriate maps, name tag/table tent, pen, pad

    i) Post-registration communication with registrants to provide pre-event information (reminders, requirements, schedule changes, etc.) and/or to collect registrant preferences, such as meal selection for event-related banquets

- Financial Management and Accounting

a) Developing event budget (includes initial setup and modifications/updates/tracking as event planning progresses)

b) Planning, organizing, directing and monitoring the financial activities such as procurement, vendor payments, instructor/contractor remuneration, interdepartmental fund transfers

c) Applying general management principles to financial resources

d) Oversee collection of revenues and expenditures

e) Balance/reconcile and provide a final summary of all incomes and expenses (full reconciliation to be done within 90 days after the conclusion of the event)

- Logistics Planning

    a) Arrange for all required catering associated with the event. Develop menus for meals and identify food and beverage to be supplied to event attendees at specified breaks and social events (including alcoholic beverages)

    b) Provide coordination and support for event-related activities requested by the event organizer including, but not limited to: social events, banquets, committee dinners, award ceremonies, field trips, excursions, and accompanying person programs

    c) Arrange for event venues including auxiliary venues for items listed above

    d) Provide coordination and logistical support for transportation as needed for items listed above

    e) Reproduce and assemble course materials (as provided by the event organizer)

    f) Purchase necessary preprinted course materials/books/flash drives

    g) Purchase any required speaker/chair gifts; award plaques/trophies

    h) Coordination of supplemental audio/visual needs; videotaping; remote participant access; interpreters

    i) Supplemental details required to send to attendees outside of confirmations, receipts such as liability/release forms

    j) Arrange hotel blocks

    k) Arrange wireless internet access

- Marketing Services

    a) Management of the marketing process from flyer/tri-fold brochure design through printing and distribution. Design and development of marketing materials shall be accomplished in collaboration with the event organizer and shall use images/graphics/verbiage supplied by the organizer.

    b) Assistance with promotional strategy and distribution channels with input from the event organizer

    c) Secure appropriate mail/email lists for distribution and e-marketing blasts

    d) Preparation of journal ads. Design and development of advertisements shall be accomplished in collaboration with the event organizer and shall use images/graphics/verbiage supplied by the organizer.

- Sponsor and Exhibitor Management

    a) Additional web presence for sponsorship and exhibitor opportunities; for example, listing of sponsors/exhibitors and display of company logos on the event's website

    b) Financial management with special payment portal that not only includes payment process but ability to upload company logo, company description, designate specific exhibit locations

    c) Floor planning, lighting, audio/visual, and technical support and any necessary contract negotiating with outside vendors

- On-Site Management/Event Management

  a) Registration Desk/Concierge Service that is open throughout the event [additional fee for hours beyond contract]

  b) Orienting volunteer or student registration workers

  c) Ability to register on-site, make substitutions, correct name badges, replace lost badges

  d) Coordination with vendors/on-site facility management/audio-visual

  e) Take payment for additional products or services (proceedings, flash drives, meal tickets)

  f) Production and installation of signage at the venue

  g) Production of attendee guides and information: venue layout, event schedules, check-in instructions, emergency information

  h) Real time coordination with event venue management

- Document Management

  a) Provide assistance and/or recommendations to the event organizer in selecting a document management strategy and an appropriate supplier or solution

  b) Oversight of the document management process and assistance in resolving issues with the document management process being used