

Invitation to tender

Event delivery support:
community wealth building summit 2020



CLES
the national organisation
for local economies

1. Background

CLES

CLES is the national organisation for local economies - developing progressive economics for people, planet and place. We work by thinking and doing, to achieve social justice and effective public services. Our work in community wealth building aims to reorganise wealth and the local economy, from the bottom up, making it more socially and environmentally just.

To enable more people to transform and take control of their local economies, we established the Community Wealth Building Centre of Excellence.

The community wealth building summit

The community wealth building summit is the UK's only event dedicated to community wealth building. The event is now in its third year and acts as CLES' flagship annual event. The summit attracts an audience of approximately 150 delegates from a range of sectors and showcases the successes of the community wealth building approach.

As both the previous iterations of the event have sold out and the interest and enthusiasm for community wealth building in the UK grows, we recognise the need to scale and professionalise the event and we require administrative support from a professional event manager to do so.

Key dates

- **Briefing meeting/project inception**
w/c Monday 3rd February 2020
- **Pre-summit dinner**
Wednesday 10th June 2020
- **Summit**
Thursday 11th June 2020

Budget

Up to a maximum of £5,000 and travel.

20 days (to include one week office based in Manchester immediately prior to the Summit and any site visits required)

2. Requirements

Sponsor support

Previous Summits' costs have been covered by financial and in-kind contributions from partners who align with our mission and values, in exchange for brand positioning at the event, access to event opportunities and involvement in a subsequent publication from CLES. While CLES will seek to renew these arrangements for 2020, further support is required in:

- Reviewing sponsorship proposals to ensure they are deliverable by CLES including working with the CLES team to ensure that resources are properly allocated for any agreements made;
- Working with the CLES team to ensure that sponsor relationships are maintained by ensuring any third-party branding is appropriately deployed, managing sponsor ticket allocations and speaker opportunities.

Days: 2

Venue management

It is likely that a venue will be offered by one of our partners as part of an in-kind sponsorship package. Working in consultation with CLES, the tender holder would be expected to ensure that the venue offered reflects our aspirations for the event, both in terms of logistics and themes. For example, in 2019 the event was held at The Florence Institute in Liverpool – a social enterprise that reflects the community wealth building approach of returning local land and assets to the people. In addition to venue sourcing, support is required in the following areas:

- Arranging contracts and managing capacity and access requirements;
- Ensuring that AV in place is appropriate with adequate support on the day – sourcing and managing a third-party supplier if necessary;
- Managing catering – booking, confirming numbers and dietary requirements etc - sourcing and managing a third-party supplier if necessary;
- Circulating briefings on venue logistics to all parties in advance and ensuring that everyone is clear on their roles and responsibilities on the day of the event.

Days: 4

Pre-event dinner

CLES will host a private dinner for sponsors, headline speakers and other stakeholders (approximately 20 people) on the evening prior to the summit. The tender holder will be required to:

- Source an appropriate venue in reasonable proximity to either the Summit venue or where the majority of attendees will be staying that evening;
- Liaise with the venue regarding contracting, attendee numbers, menu choices, dietary and access requirements;

- Support the Chief Executive and the External Affairs Manager in issuing and following up on invites to attendees;
- Communicating essential information to attendees prior to the event.

Days: 1

Speaker management

CLES will secure headline speakers and issue initial invitations to panel members. Support is required in the following areas:

- Liaising with CLES' Office Manager to ensure travel and accommodation needs for speakers are met where appropriate;
- Issuing briefings to all speakers and panellists to include logistics and content guidance, with support from the CLES team;
- Working with CLES to confirm panellists for breakout sessions once initial invitations have been issued;
- Ensuring that any presentations from CLES team members and speakers are received in time for them to be properly used and liaising with the External Affairs Manager and AV support to ensure presentations are properly branded and shared to the venue in advance;
- Gathering contact details and ensuring that all speakers are in attendance and in place for their sessions on the day of the event – introducing them to the Chief Executive or session leaders where appropriate;
- Liaising with the CLES team to send thank you notes and gifts for all speakers and ensuring these are sent by the appropriate CLES team member.

Days: 3

Booking support and delegate management

Event bookings will be managed through Eventbrite (or an alternative platform as recommended by the tender holder), where tickets will be for sale for a small fee. The tender holder will need to:

- Ensure that all delegate information collected is captured on Eventbrite - including for non-paying attendees, speakers, CLES staff and sponsor delegates - so that Eventbrite is a true reflection of the attendees and reports can be run by the CLES team at any time;
- Monitor sales to ensure that the audience is a good reflection of the sectors we wish to represent at the summit and work with the External Affairs Manager to run targeted campaigns to recruit delegates from underrepresented areas;
- Share weekly reports with the CLES team on ticket sales;
- Work with the External Affairs Manager to communicate essential event information with delegates in a timely manner.

Days: 2

Event literature

In 2019 CLES used a third-party app to manage the process of booking delegates onto breakout sessions, share delegate lists and agendas for the day, as well as to communicate essential information to delegates on the day of the event. On the whole this worked well but we would like to review this provision and additional support may be required to deliver this, which would be negotiated with the tender holder. If this element is not taken up in 2020, we will require support with the following:

- Designing and printing event literature (agendas, delegate lists, etc) in consultation with the External Affairs Manager;
- Ensuring delegates are booked into breakout sessions;
- Sharing essential information with delegates.

Days: 2

Event registration and welcome

Delegates will be welcomed on arrival at the summit by CLES staff and asked to register, in this the following support is required:

- Producing name badges and lists of registrants ahead of the event for use on the registration desk;
- Liaising with the CLES team to ensure they are appropriately resourced and have all the materials and information they need to ensure smooth registration of attendees;
- Devise a system of registration for speakers and sponsor representatives to ensure that their presence is communicated to session leaders or other relevant parties and appropriate introductions are made – ensure that there are enough staff resources to deliver this;
- Produce event “goodie bags” within a budget assigned by CLES that reflect the themes of the event and the values of us and our delegates.

Days: 2

On the day showrunning

The tender holder will be the onsite manager on the day of the event and will take responsibility for:

- Briefing the venue to ensure details have been thoroughly communicated;
- Liaising with AV teams to ensure all presentations are in place and equipment working;
- Liaising with catering to ensure food comes out in a timely manner;
- Briefing all CLES staff to ensure they know their roles and responsibilities and are able to answer any delegate queries;
- Ensuring that the registration process runs as above;
- Liaising with breakout session leaders to ensure they have the information needed to run their sessions – including ensuring they are in contact with panel members;

- Making sure that all sessions run to time;
- Being the central point of contact for all event enquiries that cannot be answered by the CLES team;
- Other essential duties as required.

Days: 2

Insight

This event represents an important opportunity for CLES to connect with our community of existing and prospective stakeholders at all levels. Therefore, it is essential that we are able to hear their reflections on the summit, on the community wealth building movement in the UK as a whole and on CLES' work in the sector. The tender holder will be required to:

- Design an insight programme to be woven through the event which will allow us to reflect on the above factors – this should include:
 - Pre-event opportunities for delegates to share their reflections
 - In-event capture of sentiment/key moments
 - Post-event surveys
- Provide CLES with a short written report based on the information gathered by insight and reflections from the tender holder on sales and event performance based on their professional experience.

Days: 1

Client communication

The tender holder will act as the manager for all issues related to the logistics of the event, working under the guidance of the External Affairs Manager who will work with the CLES team to determine themes, content and communications relating to the event. It is essential that both the External Affairs Manager and the wider CLES team are able to track the progress of the event in its lead up and know at any given time exactly what has been done, what is in progress and what remains to be done. In this, the tender holder must:

- Devise a system of reporting the timeline and actions for the event which is continually updated and accessible to the CLES team at all times.
- Send regular written progress reports to the External Affairs Manager to be circulated with the CLES team.

Days: 1

3. How to respond

Expressions of interest

Please respond to the brief by email to helenpower@cles.org.uk by Friday 10th January 2020.

We would like to see

- Your understanding of CLES and our requirements
- Delivery plan with timetable
- Pricing schedule
- Experience and examples of your work
- Your organisational values

Client contact details

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