

June 9, 2017

Re: Request for Proposals for Future CFHA Conference

Dear CFHA Members and Supporters,

The CFHA Board of Directors is interested in engaging our members and supporters in helping us determine the next best place to hold the event.

If you are interested in hosting a future Conference, we invite you to review the attached fact sheet and application packet. We believe that having several diverse proposals will improve the quality of the Conference and we strongly encourage you to discuss this opportunity with your local colleagues and stimulate interest in applying.

In order to assist staff and the board in planning for the proposal review process, **all interested parties must submit a brief letter of interest.** In the letter of interest, please identify two or more multidisciplinary co-chairs, the proposed city and state for the conference, and a brief statement describing why your city, state and region would be ideal for a CFHA conference. **Letters of interest should be emailed to Jackie Poor Hahn at info@cfha.net.**

A detailed description of the application requirements, timeline and scoring criteria are included in the attached packet.

We are happy to set up informational calls to assist those interested in applying. Please feel free to direct all questions or concerns regarding the application and process to email info@cfha.net.

Thank you in advance for considering submitting an application.

Kind regards,



Neftali Serrano, PsyD
Executive Director

APPLICATION TO HOST A CFHA CONFERENCE

The Collaborative Family Healthcare Association is currently accepting applications to host future CFHA Conferences in locations across North America. Interested parties should review the expected requirements and complete the application below. If additional information is needed, please contact CFHA's Executive Director, Neftali Serrano (nserrano@cfha.net or at 608-556-1027) as early as possible so that our staff and board can assist you in this process. Please limit the application to 2-4 pages. Applications must be submitted by email to info@cfha.net.

Proposed city/region to host the conference:

Proposed Conference Co-chairs:

- *Identify 2-3 individuals, ideally representing different disciplines, who will serve as Conference Co-chairs*
- *Please see **Attachment A** for a full description of Co-chair responsibilities*

Please list additional individuals who have committed to serve on the Local Planning Committee:

The committee will be the key connectors with local and national partners for developing the program and raising support funds. At a minimum, participation will include contributing to monthly conference calls beginning one year before the conference date.

**Why would your city, state, or region be an excellent site to host the Conference and Summit?
Please include:**

- Current progress in implementing collaborative care that will be highlighted at the conference and summit;
- Current policy and financial needs that will be the focus of advocacy during conference and summit;
- Financial and travel-time advantages of your site for conference participants;
- Social, cultural, and tourism attractiveness of your site;
- Geographical diversity compared to previous CFHA conferences.

Please limit to 1,000-1,500 words.

Detail partnership agreements (financial, logistical, inter-association) that are in place or have a strong possibility of being awarded or created:

It is expected that the combined efforts of the Local Planning Committee with CFHA staff support will result in \$60,000-\$80,000 in sponsorship support.

Please limit to 300-500 words

*Optional: Please consider including brief letters of support from potential Local Planning Committee members, organizational partners, and potential financial supporters. Letter templates are included in **Attachment B**.*

CFHA FACTS

The Collaborative Family Healthcare Coalition was founded in 1993 as a diverse group of physicians, nurses, psychologists, social workers, family therapists and other health care workers, working in both primary and tertiary care settings, who study, implement, and advocate for the collaborative family health care paradigm. It also includes researchers, educators, health care policy workers, and consumer group representatives.

The mission of the **Collaborative Family Healthcare Association (CFHA)** is to promote comprehensive and cost-effective models of healthcare delivery that integrate mind and body, individual and family, patients, providers, and communities. CFHA achieves this mission through education, training, partnering, consultation, research, and advocacy.

ABOUT THE CFHA CONFERENCE

The CFHA Annual Conference is a national showcase for demonstration projects and pilots, as well as those who seek collaborative solutions to the complex challenges of patient care. Individuals and organizations interested in innovative and cost effective strategies for integrating behavioral health and medical health care delivery, improving patient outcomes, professional networking and provider training are encouraged to attend.

Conference attendees include medical and behavioral health providers and administrators, such as primary care providers, psychiatrists, psychologists, nurses, family therapists, and social workers. These individuals work primarily in healthcare institutions, medical clinics, universities, government and corporations.

CFHA is a 501(c)3 tax-exempt organization.

ATTENDANCE SUMMARY AND PROJECTIONS

Average attendance has increased slightly over the past few years and we anticipate 500-600 people to attend the 2019 Conference. History shows that nearly 30% of Conference participants reside in surrounding states.

PRIOR CONFERENCES AND ROOM RATE HISTORY

October 15-20, 2018 – Hyatt Regency, Rochester, NY (\$169)

October 19-21, 2017 – Royal Sonesta Houston Galleria Hotel, Houston, TX (\$169)

October 13-15, 2016 – Westin Charlotte Hotel, Charlotte, NC (\$189)

October 15-17, 2015 – Portland Downtown Waterfront Marriott (\$179)

October 16-18, 2014 - Omni Shoreham Hotel, Washington, DC (\$229)

October 10-12, 2013 - Omni Interlocken Resort, Broomfield, CO (\$144)
 October 4-6, 2012 - Hyatt Regency Austin, Austin, TX (\$169)
 October 27-29, 2011 - Sheraton Society Hill Hotel, Philadelphia, PA (\$179)
 October 21-23, 2010 - The Seelbach Hilton Hotel, Louisville, KY (\$130)
 October 22-24, 2009 - Hilton San Diego Resort & Spa, San Diego, CA (\$189)
 November 6-8, 2008 - Grand Hyatt Denver, Denver, CO (\$179)
 November 8-10, 2007 - Crowne Plaza Resort, Asheville, NC (\$129)
 November 2-4, 2006 - Hyatt Regency Newport Hotel and Spa, Newport, RI (\$159)
 October 6-9, 2005 - Red Lion Hotel, Seattle, WA (\$139)
 October 21-24, 2004 - Oak Ridge Conference Center, Chaska, MN (\$119/138)
 January 24-27, 2002 - Clearwater, FL (biennial conference)
 January 27-30, 2000 - Bethesda, MD (biennial conference)
 March 4-8, 1998 - Kiawah Island, SC (biennial conference)
 February 6-9, 1997 - Natcher Conference Center, NIH Washington, DC (biennial conference)

One of the greatest benefits of the CFHA Annual Conference is to stimulate thinking and share ideas about best practices in collaborative care. The Conference offers a diverse selection of presentations that appeal to all levels of collaborators - from basic to advanced - sharing innovative and cost effective strategies for integrating behavioral health and medical health care delivery, improving patient outcomes, professional networking and provider training.

- Pre-conference Workshops are half-day sessions that focus on specific or unique skills and best practices.
- Plenary sessions represent a broad scope of subjects related to the big picture of integrated care.
- Concurrent Sessions emphasize clinical, research, administrative, and education issues. Sessions may vary from 25 to 90 minutes in length, with 6-8 sessions held simultaneously during each period, for a total of approximately 75 sessions during the Conference.
- Display boards allow for 20-60 poster presentations from students and researchers.
- Facilitated roundtable discussions encourage small group interactions.
- The CFHA Lounge hosts exhibitors as well as refreshment breaks throughout the Conference. This area promotes informal networking between education sessions.
- A welcome reception and daily lunches also offer excellent opportunities to connect with old friends and make new acquaintances.

| Day 1 (Thursday) | Day 2 (Friday) | Day 3 (Saturday) |
|--|---|---|
| Preconference Workshops (50-75) Welcome Reception (400) Plenary Session (500) | Plenary Session (500) Concurrent Sessions (7-8 rooms, 50-100 each) Lunch (500) | Plenary Session (500) Concurrent Sessions (7-8 rooms, 50-100 each) Lunch (500) |

THE CONFERENCE DESTINATION

Factors to be considered when determining the destination of CFHA's Conference include:

- Seasonality of the conference destination
- General appeal and rate affordability
- Easy access to the destination – multiple carriers, adequate number of flights, etc.
- Affordable transportation options from local airport(s)
- Proximity to restaurants, shopping, entertainment, recreation and/or historic sites
- Reputation of destination for hosting meetings – support and services available from local convention bureau, availability of experienced suppliers, such as audiovisual firms, exhibit service contractors, etc.
- Choice of multiple properties that can accommodate 275+ hotel rooms on peak night and a minimum of 35,000+ square feet of appropriately configured meeting space
- Safety of area and economic health of community
- Tax exempt status honored by hotels and service providers – CFHA is a 501c3 organization with IRS-approved tax-exempt status.

REQUEST FOR PROPOSAL (RFP) PROCESS:

The CFHA Conference Site Selection Committee (subset of the CFHA Board of Directors) will be responsible for reviewing Proposals, conducting phone interviews, and evaluating and rating proposals/presentations submitted in response to this RFP.

SCHEDULE OF REVIEW:

- Letter of Intent to Submit a Proposal Received at CFHA
- Proposals due, date to be determined
- Phone Interviews and Proposal Review/Scoring (*You will be asked to provide 2-3, one to two hour windows of time in which a minimum of one member of your application team can be available for a one hour phone interview with the site selection committee*)
- Announcement of Conference site

ANNUAL CONFERENCE SITE SELECTION CRITERIA:

Site selection will be based on the based on the proposer's responses to the conference application and the conference rating considerations as appropriate. Conference rating considerations are as follows:

- Perceived commitment from Co-Chairs and potential Planning Committee Members
- Multidisciplinary team of conference planners (including co-chairs and planning committee members)
- Local/regional interest, involvement, and progress implementing collaborative integrated care
- Attractiveness of conference site (social/cultural/tourism)
- Affordability and travel-time advantages of conference site for participants
- Hotel choices and availability
- Geographical diversity (CFHA endeavors to hold its conference in different regions of the US/Canada each year in order to attract new regional audiences).
- Co-Chair and Planning Committee commitment to fundraising and sponsorship acquisition
- Local and Regional partnership (financial, logistical, inter-association) interest/possible investment

See *Attachment C: Scoring Matrix*

GENERAL RESPONSIBILITIES OF CONFERENCE CHAIRS

1. Serve as primary liaison with CFHA staff regarding all Conference planning activities prior to, during and after the CFHA Conference
2. Serve as overall host for Conference destination and assist with promotion at prior year's Conference
3. Assist in recommendation and selection of Conference location (hotel, conference center, etc.)
4. Identify local stakeholders to serve on Conference Planning Committee
5. Provide updates for CFHA Board meetings/teleconferences (usually monthly)
6. Provide overall responsibility for planning Health Policy Summit (determine stakeholders, define goals and objectives, confirm agenda and presenters, prepare invitations, coordinate registration and on-site arrangements with CFHA staff, prepare materials for Summit attendees, produce summary report after the function, etc.)
7. Assist CFHA staff with fundraising activities (identify local/regional foundations, commercial support, provide contacts and introductions, etc.)
8. Coordinate and facilitate Conference Planning Committee (schedule meetings/teleconferences, prepare agendas and send meeting notifications, prepare and distribute meeting minutes, provide general communication throughout the planning process, etc.)
9. Assign and assist Conference Planning Committee members with specific tasks and assignments (Summit, proposal reviews, speakers/workshops, local arrangements, sponsorship, posters, promotion, volunteers, CE, etc.)
10. Assist in identifying and selecting Conference themes (recommend, gather feedback, etc.)
11. Assist in recommending and contact speakers for plenary sessions, workshops, breakout sessions, etc.
12. Assist with preparation of Call for Presentations (identify desired content, themes, tracks, etc.)
13. Assist in coordinating proposal review process (gather and assign reviewer teams, review proposals, make final proposal selections, etc.)
14. Develop agenda for the overall Conference (determine overall conference schedule, select and schedule presentations, determine off-site activities, etc.)
15. Assist with gathering content, editing and proofing of Conference materials (promotional materials, on-site program and packet items, etc.)
16. Assist with promotion to local audiences (extend personal invitations to attend the Conference, email and list serves, collaboration with professional organizations in the state/region, etc.)
17. Assist CFHA staff with final coordination of on-site arrangements (layout of meeting space, classroom assignments, AV, choreography, etc.)
18. Serve as hosts on-site throughout the Conference
19. Provide feedback on overall planning and strategies to be considered for future CFHA Conferences
20. Offer support and advice for subsequent Conference chairs, as requested

LETTER OF SUPPORT TEMPLATES

Letter from potential Planning Committee members:

CFHA Conference Site Review Committee:

I strongly encourage the Collaborative Family Healthcare Association to consider XXX's application to host the 20__ Conference in [city, state].

As a [insert organization or individual professional affiliation here] interested in the advancement of integrated healthcare, we would like to offer our support for this application.

[Insert experience in/or interest in research, practice, training, financing or policy related to integrated behavioral health/primary care.]

If XXXX is selected as the conference site, we/I would be interested in participating in the Planning Committee for either the Policy Summit or Conference.

If I can answer any questions or provide additional information (insert contact information here), please do not hesitate to contact me.

Sincerely,

Letter from potential financial supporters or affiliate partners

CFHA Conference Site Review Committee:

We understand XXX has applied to host the 20__ CFHA Annual Conference in [city, state]. On behalf of [insert organization] we would like to offer our support for this application.

[Insert organization's interest in research, practice, training, financing or policy related to integrated behavioral health/primary care.]

If awarded, [insert organization name] would potentially consider partnering with CFHA and the Conference Co-chairs in the planning, implementation, and financial support of these events.

SCORING MATRIX

Site selection will be based on the based on the proposer’s responses to the conference application and the conference rating considerations as appropriate. Conference rating considerations are as follows:

| City/Region | | | |
|---|--|--|--|
| Perceived Commitment of Co-Chairs/Planning Committee (1-10 Pts) | | | |
| Multidisciplinary Team? (1-5 pts) | | | |
| Local/Regional Interest/Involvements (1-10 pts) | | | |
| Attractiveness of Location (1-5 pts) | | | |
| Affordability and travel convenience (1-10pts) | | | |
| Hotel Choices/Availability (1-10pts) | | | |
| Geographic Diversity (1-5 pts) | | | |
| Commitment to sponsorship acquisition (1-10 pts) | | | |
| Regional Partnership Interest/Investment (1-10 pts) | | | |
| Total Score | | | |