

REQUEST FOR PROPOSAL
for
CONFERENCE PLANNER
for
ENERGY OUTWEST 2020 Technical Weatherization
Conference

ISSUED
February 1, 2018

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INTRODUCTION:

The Energy OutWest organization is initiating this Request for Proposal (RFP) to solicit proposals from firms interested in providing conference planning and coordination services for Energy OutWest 2020.

CONFERENCE BACKGROUND:

In existence since 1990, Energy OutWest (EOW) is a technical conference for weatherization professionals across the country. Through a combination of workshops and hands-on tutorials, the conference provides a forum for communicating new ideas, methods, and technologies to weatherization crews, auditors, inspectors, and program managers. In 2008, Energy OutWest became a legal 501(c) 3 corporation operating out of the State of Washington. The Energy OutWest Board of Directors consists of representatives from member states.

Energy OutWest is a collaborative effort, co-sponsored by state and local agency Weatherization programs, and the U.S. Department of Energy, weatherization service providers, and local utilities. Traditionally, the EOW conference has been a western regional event. However, the success of the conference over the years has drawn attendees, as well as presenters, from all over the country, and is now seen as a leading national weatherization conference. Over 550 people attend the conference bi-annually.

The agenda for Energy OutWest is always a busy one, with as many as five different tracks with eight different sessions running concurrently. The agenda includes a variety of workshops held in-house (at the conference site), as well as tutorials offered off-site. These off-site tutorials provide an opportunity for attendees to get hands-on experience in real-life situations. In addition, the conference usually includes a vendor fair, an evening reception, and another special event.

Energy OutWest 2020 is being planned for Portland Oregon in the Spring/Fall of 2020. The conference is a two and a half day event; with additional off-site tutorials being offered the two days prior to the conference itself. A Conference Planning Committee has been convened, and will work with the selected contractor for this RFP.

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SCOPE OF WORK:

The Energy OutWest Conference Planning Committee is seeking a qualified conference organizer/planner to coordinate the development of **Energy OutWest 2020**. Specifically, we are looking for an organization that can facilitate the planning, marketing, and logistical activities necessary to ensure a well organized event. Bidders should have experience in the full range of conference planning and coordination activities. Familiarity with weatherization or energy conservation programs and/or experience working with nonprofit human service providers is not necessary, but may be beneficial.

It is anticipated that the conference planner(s) will meet with the Conference Planning Committee at least monthly during the course of the contract, though e-mail, phone and/or teleconference, or face to face. In addition, the conference planner(s) will be expected to be on-site during the entire conference to coordinate logistical matters involving conference registration and program activities. Additional contacts with the committee through e-mail, telephone, and fax will be required.

Specific duties of the conference planner will include:

1. PROGRAM DEVELOPMENT SUPPORT

- a. Serve as a member of the program Conference Planning Committee, and coordinate and prepare agenda for committee conference calls/meeting, and minutes of each.
- b. The Conference Planning Committee will work with the conference coordinator to establish the conference budget. The Conference Planner will provide e budget format, track the budget, and update conference timelines.
- c. Provide guidance on program format and environment to achieve conference objectives.
- d. Coordinate with graphics specialist and the Conference Planning Committee in the design of the conference mailings.
- e. Coordinate with website designer and the Conference Planning Committee in the design and development of a web page.
- f. Prepare conference program materials and handouts.
- g. Organize specified breakout sessions and vendors exhibit for the Energy OutWest Conference.
- h. Under the direction of the Conference Planning Committee, research and provide catalogs from vendors for selection, negotiation, and purchase of complimentary items to be included in registration packets.
- i. Negotiate with local transportation companies, and coordinate with the selected vendor for transportation to off-site tutorials.
- j. Coordinate two times per year face-to-face Energy OutWest Board and Conference Planning Committee meetings to be held in the United States.

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2. FINANCIAL MANAGEMENT / ACCOUNT / BUDGET

- a. Deposit receipts in the conference account and maintain accounts for audit purposes.
- b. Maintain separate accounting records of expenses incurred as to: budgeted items for conference planning services, and direct reimbursable expenses (e.g. printing costs, meeting space costs, etc.), and provide update to Conference Planning Committee chair.
- c. Maintain a list of receipts and method of payment (cash, check, bankcard).
- d. Invoice and collect unpaid registrations and vendors fees.
- e. Manage refunds according to conference policy.
- f. Review bills and makes payments, as authorized by Conference Planning Committee, for conference expenses, including speaker fees, in a timely manner.
- g. Provide final financial report after all income is received and bills are paid within four months of conference closure.

3. REGISTRATION

- a. Receive and process registrations (including speakers, vendors and complimentary) by mail, fax, phone, or online.
- b. Provide a toll-free number for potential participant registration and questions.
- c. E-mail registration confirmation letters at least one week prior to session.
- d. Provide notice of confirmation to tutorial registrants at least one week prior to session.
- e. Prepare name tags with registrant's name, company name, city, state.
- f. Assemble program packet materials.
- g. Respond to letters, telephone calls, and e-mails regarding registration.
- h. Prepare final roster of registrants with name, address, and affiliation.
- i. Manage and staff on-site registration, including tracking of registration fees paid/owed, and providing registration materials.
- j. Supervise on-site logistics throughout conference.

4. FACILITIES PLANNING / NEGOTIATION

- a. Negotiate costs, work with EOW Executive Management to obtain signatures on contracts/agreements, as directed by the Conference Planning Committee chair, with selected hotel and/or convention center for:
 - 1) Hotel room nights (including complimentary rooms),
 - 2) Meeting and dining room facilities, and equipment,
 - 3) Secured area for vendors exhibit,
 - 4) Meals, breaks, and a conference reception.

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- b. Serve as liaison between Energy OutWest Conference Planning Committee and facilities staff once contracts have been signed.
- c. Assist Conference Planning Committee in selection of meal menus.
- d. Assist Conference Planning Committee in scheduling and selecting food and beverage service for breaks, and a conference reception.
- e. Assist in providing meeting room and lodging accessibility in compliance with current ADA standards.
- f. Arrange for a space for evening events, as needed.

5. PROMOTION, PRINTING, MARKETING

- a. Work with the conference committee in the design of conference materials, including “save-the-date” card, registration brochures, conference program, posters, exhibit materials, flyers, and signage.
- b. Arrange for the printing and assembling of the above listed items.
- c. Mail “save-the-date” cards to a list provided by the Conference Planning Committee.
- d. Negotiate with vendors for the purchase and printing of conference logo items for registration packets (e.g. folders, tote bags, etc.).
- e. Assist Conference Planning Committee in soliciting sponsor contributions to the conference.
- f. Prepare and maintain EOW Conference app on the lead up, during, and post conference.

6. COORDINATION OF PRESENTERS

- a. Negotiate and execute speaker contracts as directed by the Conference Planning Committee.
- b. Make travel arrangements/hotel accommodations for presenters/speakers as directed by Conference Planning Committee.
- c. Coordinate with facilities for availability of a presenter’s preparation room.
- d. Solicit from presenter and speakers, biographies and workshop descriptions to be included in the conference program.
- e. Assist Conference Planning Committee with scheduling moderators for each session.
- f. Anticipate and coordinate for copying of presenters printed materials.
- g. Complete appropriate travel forms for those designated by the Conference Planning Committee to be reimbursed.
- h. Send thank you letters to presenters and speakers.

7. AV COORDINATION

- a. Provide AV equipment as follows:
 - 1) LCD projector, computer, and screen to each break out session

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- 2) 2 LCD projectors, one computer, 1 wireless handheld microphone and 2 wired microphones for general session
 - 3) As part of this scope of work, the Conference Planner shall also provide up to \$3,000 of additional AV equipment that is not outlined above (additional AV equipment includes but is not limited to Flip Charts, Overhead Projectors, and Slide Projectors to be used for general and breakout sessions)
 - 4) If additional AV requests total more than \$3,000, the Energy Outwest conference will be responsible for the additional charges.
- b. Gather speakers PowerPoint presentations and preload on computers in each session.
 - c. Provide adequate staff to assist with AV needs for speakers in each breakout session.

8. CONFERENCE EVALUATION

- a. Assist with development of an evaluation for the sessions, and an overall conference evaluation by the participants.
- b. Provide a summary of the evaluations to the Conference Planning Committee.

In general:

- Work with the Conference Planning Committee to identify and secure under contract a facility to hold a conference for approximately 1,000 people.
- Plan and coordinate a Weatherization Technical Conference involving up to 1,000 people.
- Coordinate the two time(s) per year face-to-face committee meeting location TBD
- Negotiate contract with selected conference venue and appropriate hotels.
- Coordinate presenters: negotiate and execute contracts; confirm and make presenters' travel and lodging arrangements; coordinate workshop and tutorial needs, including copying and audio-visual needs; develop bios, workshop and tutorial descriptions; arrange transportation to off-site locations; and send thank you letters.
- Provide on-site coordination and support with hotel staff, presenters, and conference attendees prior to, during, and after the conference.
- Arrange for lodging, meals, meeting rooms, transportation, reception, events, tours, and sessions for the conference.
- Coordinate, facilitate, prepare minutes for Conference Planning Committee meetings; establish, track, and update conference budget, time lines, and key conference goals.

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- Coordinate and direct the entire conference registration process, including: develop and mail conference notices and registration forms; process completed registrations and fees; mail registration confirmations; respond to general questions; staff on-site registration; and prepare and distribute conference packets and materials.
- Produce, publish, and distribute all printed conference materials, including registration brochure, program/agenda, workshop descriptions, speaker bios, attendee list, etc.
- Negotiate with vendors for the purchase and printing of conference logo items for registration packets (e.g. folders, tote bags, etc.).
- Produce, publish, distribute, and summarize conference evaluations and final conference report.
- Provide onsite AV staff support and equipment throughout the conference venue as described above.

All of the above duties and any additional duties assigned by the chair(s) of the Conference Planning Committee are to be performed under the approval and oversight of the Conference Planning Committee.

The above list is not meant to be all inclusive of the duties and activities involved. The Conference Planning Committee will assist in developing conference program activities, printed materials, mailing lists; soliciting conference vendors and sponsors; and on-site staffing.

Direct costs for meals, site rental, equipment rental, printed materials, conference logo items, speaker fees, and transportation to off-site conference sessions will be billed to and paid by Energy OutWest and should not be included in this proposal.

CONTRACT PERIOD AND BUDGET:

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about July 1, 2018, and remain in force through July 30, 2020. The contract cost of this project will not exceed \$_____.

This contract can be extended for a period of three to five years, which could include EOW Conferences in 2022 and 2024, subject to satisfactory contract performance.

INSTRUCTIONS TO BIDDERS:

Eligibility

Bidding is open to those firms who can satisfy the requirements stated herein and are available for work in the State of Washington.

Response Format

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To be eligible for consideration applicants must provide the following:

- Narrative explanation of experience in conference planning, including a list of conferences applicant has planned. Provide conference name, dates, location, number of attendees, subject matter. Provide a sample of printed materials you have produced for conferences.
- Provide name, phone number, and e-mail (if available) of a contact person.
- Certification that Bidder is bonded and level of bonding held.
- List of principle(s) and partners in Bidder's firm.
- Name of the person or persons who will have direct contact with the Energy OutWest Conference Planning Committee, their credentials, experience and references for each.
- State and Federal Tax Numbers, and certification that Bidder is not currently in violation of any tax laws.
- Letters of reference from at least two prior clients receiving conference planning support by you for events of a similar size and scale.
- A detailed sample budget of anticipated total conference costs for a conference of up to 1,000 persons, including staff costs with a brief narrative of each cost items for the conference.
- A detailed line item budget of bidder's expenses related to completing each of the Scope of Work categories beginning on page 2 of this proposal. If there are additional expenses the conference planner expect to incur that is NOT listed in the scope of work above please list the amount and provide details in a separate line item. Please note that EOW has already negotiated the 2020 site location and hotel in Portland Oregon but we expect the conference planner we hire to assist with negotiation and coordination needs that occur beginning with the date we execute a contract with the conference planner.

Failure to comply with any part of the Request for Proposal may result in rejection of the proposal as non-responsive.

Submission of Proposals

Please submit **one** electronic PDF file of the entire proposal. The original must be signed by the President or Executive Director, managing partner, or proprietor. Proposals and any accompanying materials will become the property of Energy OutWest.

Proposals must arrive at the address below by March 16, 2018 **no later than 3:00 p.m.**

Mountain Standard Time Arizona. Any questions regarding this request for proposals should

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be directed via e-mail to Carrie Smith at the address below, not later than 2:00 pm Mountain Standard Time Arizona, on Friday, March 9, 2018. Responses to all questions will be directed via e-mail to all respondents by 3:00 pm MST Arizona on Tuesday March 13, 2018. Questions related to this proposal may be directed to:

Carrie Smith, Chief Operating Officer
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1201 E. Thomas Rd.
Phoenix, AZ 85014
Phone: (602) 285-0505 ext. 142
e-mail: csmith@fsl.org

Late proposals will not be accepted and will be automatically disqualified from further consideration.

Selection of Proposal

Proposals will be reviewed by the Energy OutWest 2020 Conference Planning Committee. Proposals will be evaluated and scored on the following basis, with a point total of 105 points:

- Completeness and quality of information; 25
- Experience of the applicant organization, particularly with similar projects; 20
- Experience of the person assigned to head the project; 20
- Reasonableness and completeness of the budget. Detail counts. 25
- References. 10
- Bidder preference for Weatherization Service Provider. 5

Energy OutWest reserves the right at its sole discretion to reject any and all proposals received without penalty. The final selection, if any, will be that proposal which, in the opinion of Energy OutWest after review of all submissions by the evaluation team, best meets the requirements set forth in the RFP and is in the best interest of Energy OutWest. Energy OutWest reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the Bidder can propose. The contents of the proposal will be kept confidential and not shared with any competing entity.

Bidders should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiation may provide for the incorporation of the Bidder's proposal. It is understood that the proposal will become a part of the official file on this matter without obligation to Energy OutWest. This RFP does not, however, obligate Energy OutWest to contract for services specified herein.

Bidders whose proposals are not selected for further negotiation or award will be notified in writing at the address given in the proposal after the award is made. That date is expected to be on or around April 6, 2018.