



National Low Income Energy Consortium



National Fuel Funds Network

Request for Proposals

RFP No. 2008-01

Conference Management Firm for 2010 National Energy and Utility Affordability Conference

Closing Date: August 1, 2008

The National Low Income Energy Consortium and the National Fuel Funds Network request proposals for a conference management firm to assist in planning for and implementation of the 2010 National Energy and Utility Affordability Conference, to be held in June 2010 in San Antonio, Texas.

The National Energy and Utility Affordability Conference (hereafter referred to as "NEUAC") is presented by the National Low Income Energy Consortium ("NLIEC") and the National Fuel Funds Network ("NFFN").

NEUAC and the annual meeting of the National Energy Assistance Directors' Association ("NEADA") are held on consecutive dates at the same location annually and are known as the Joint Energy Conferences ("Joint Conferences").

Although the NLIEC will be the client under Request for Proposals No. 2008-01, no agreement will be entered into without the concurrence of NFFN, and the conference management firm ("contractor") may reach separate agreements with NFFN and NEADA for additional work associated with the Joint Conferences but outside the scope of RFP No. 2008-01.

The contractor will be responsible under this Request for Proposals for assisting in the selection of a site hotel for the Joint Conferences and for planning, logistical management and successful implementation of the National Energy and Utility Affordability Conference.

The National Energy and Utility Affordability Conference is funded through a combination of revenue from registration fees, exhibitor fees and sponsorships and has an approximate annual budget of \$300,000. NLIEC intends to award one contract as a result of this solicitation.



Submit one original and eight clearly labeled copies of the proposal no later than August 1, 2008, to:

David Fox
Executive Director RFP No. 2008-01
National Low Income Energy Consortium
6324 Beryl Road
Alexandria, VA 22312-6303

Proposals may be submitted electronically in PDF format to: dfox@nliec.org

Late proposals will be returned unopened. Faxed proposals will not be accepted. Proposals must be clearly labeled RFP No. 2008-01.

INTRODUCTION

The National Low Income Energy Consortium is a 501(c)(3) non-profit organization founded in 1986. It is a public-private partnership, governed by a board of organizations representing the full spectrum of perspectives in the low income energy community. The NLIEC Board of Directors reflects diverse interests with a singular purpose embodied in the theme “Building Bridges.” NLIEC works hard to build bridges of cooperation and understanding between the organizations and individuals who are developing coordinated solutions to low-income energy and utility problems.

NLIEC’s mission is to bring together organizations and individuals from the public, private, and nonprofit sectors for the common purpose of increasing awareness of and eliminating residential energy and utility hardships and crises faced by low-income consumers. One of the major ways it carries out this mission is conducting the National Energy and Utility Affordability Conference.

The National Fuel Funds Network is the association of charitable fuel funds. Since its founding in 1984, NFFN has grown to more than 300 organizations. NFFN’s main mission is to increase the resources available to meet the energy needs of people with low income. Its membership includes private fuel funds, also called energy banks or utility assistance funds; utilities; private citizens; community action and social service agencies; and government and Tribal programs.

NFFN programs include: NEUAC, technical assistance to members; Washington Action Day for LIHEAP (the federally funded Low Income Home Energy Assistance Program) each winter; a website; the quarterly National Energy Assistance Report and, in 2008, will present the Victorine Q. Adams Institute, where participants will discuss current best practices in fuel fund fundraising and develop strategies for future fundraising. The Network’s Energy Safety Net Project reports on and stimulates best practices and fundraising. NFFN’s Energy Safety Net Toolkit provides utilities, nonprofits and governments with tools to build new programs and collaborations.

NLIEC held its first three-day national conference – the National Low Income Energy Conference and Symposium – at Baltimore, Maryland, in 1987. National conferences have been conducted at different locations within the 48 contiguous states each year, with the goal of



ensuring that each region has the opportunity to host a conference at least once within a five-year period. By 2007, attendance at the annual conference had grown to more than 500 people.

Historically, the National Fuel Funds Network held its annual conference on the two days preceding the National Low Income Energy Conference. In 2006, however, the organizations' respective boards agreed to combine the conferences into one, seamless three-day event to make attendance less expensive and more convenient for conferees.

NLIEC partnered with NFFN to present the first National Energy and Utility Affordability Conference in June 2008 at Denver, Colorado.

The National Energy Assistance Directors' Association (NEADA) represents the state directors of the Low Income Home Energy Assistance Program. NEADA was formed in 1983 to support states in the development of LIHEAP policies to provide quality assistance to eligible households.

NEADA accomplishes its goals through coordinating and cooperating in the collection and dissemination of information, proposing energy policy, providing program administrative advice, analyzing programs and benefits among public and private institutions, and enhancing each state's capabilities and responsibilities in the administration and delivery of energy assistance. In addition, NEADA conducts ongoing surveys of program applications, recipients, arrearages and shutoffs throughout the program year.

The National Low Income Energy Consortium and National Fuel Funds Network request proposals from conference management firms that would like the opportunity to assist us in conducting the 2010 National Energy and Utility Affordability Conference, to be presented in June 2010 at San Antonio, Texas. Attendance is expected to be from 550-650 participants.

The contractor also would be expected to provide support, through a separate agreement, for the annual meeting of the National Energy Assistance Directors' Association. Together, NEUAC and NEADA's annual meeting are known as the Joint Energy Conferences.



SCOPE OF WORK

The scope of work under Request for Proposals 2008-01 would involve two distinct areas: 1) Registration and Conference Manager Professional Services, and 2) Publications Management. The duties to be performed are as follows:

Registration and Conference Manager Professional Services

A. Negotiation

- Assist the boards of directors of NLIEC and NFFN with site selection.
 - Develop venue options in selected areas. Conduct site inspections and prepare recommendation based on the cost of the site to NLIEC and NFFN, the cost to the attendee, and the suitability of the site, facilities, location, etc., for the event.
 - Negotiate agreements with hotel executives and/or convention center relative to all details and costs for the meeting, pursuant to instructions and needs of NLIEC and NFFN.
 - After authorization, including legal review, sign contract that outlines all details and specifics.
 - Negotiate and contract with outside suppliers, as requested or authorized by NLIEC and NFFN.

B. Program Logistics

- Work with the executive directors of NLIEC and NFFN to update and follow an activity timeline
 - Seek identification/clarification, from each organization, as to from whom input and authorization should be received on various tasks to be performed.
- Work with the executive directors to develop and control the conference budget
 - Advise organizations on potential costs and make recommendations for specific line items (including advising on hotel personnel to receive tips as well as plans for distributing tips).
 - Negotiate and select items to conform to budgetary constraints.
 - Operate within established conference budgets.
 - Alert organizations to potential cost overruns in a timely fashion and advise organizations of other options available, giving organizations sufficient time to revise plans in order to adhere to budgetary constraints.
- Monitor hotel contract to assure compliance with stipulations
 - Ensure that hotel meets ADA requirements.
 - Ensure that all rates, complimentary rooms, special concessions are awarded.
 - Ensure that all contractual time lines are met.
- Coordinate the filing of all appropriate documentation with hotel (insurance, tax exemption, vendor permits)



- Serve as the single point of contact with the hotel for all planning/billable activities
 - Maintain on-going communication to prepare and troubleshoot to assure seamless conference.
- Plan and coordinate all meeting room and function space assignments according to the needs of the groups and the availability of the hotel
 - Prepare Session Report on a weekly basis beginning eight weeks from conference.
 - Arrange for each session to take place in the most appropriate function space.
 - Schedule most appropriate room set including AV placement.
 - Prepare appropriate signage for all functions.
- Coordinate all AV requirements
 - Gather AV needs from organizations and from speakers.
 - Develop bid process for securing best-possible pricing.
 - Communicate special AV requests to organizations and work with organizations to determine what best fits budget.
 - Arrange AV needs.
 - Work with AV volunteer to ensure his/her understanding of NLIEC/NFFN-owned LCD placement procedure/responsibilities.
- Plan and coordinate all food and beverage functions
 - Set menus and counts within budget.
 - Negotiate any other food/beverage costs that may be incurred through the hotel.
 - Coordinate all food/beverage function needs such as special diets, serving instructions, decorating requirements.
- Coordinate with hotel and outside providers of goods and services to provide logistical support
 - A/V and office equipment, producers of signs, banners and ribbons, ground transportation companies, photocopy service companies, etc.
- Assist with conference exhibitors
 - Update exhibitor policies/procedures; designate booths, and shepherd exhibitor requests to the appropriate individual/service.
 - Develop and make cost and ordering information available to exhibitors for special services (drayage, electric, etc.).
 - Make certain that all vendor permits are obtained and regulations are followed
 - Communicate with the vendors on site to address exhibit space needs/concerns and to encourage future attendance.
- Work with executive director to develop off-site and/or evening activities
 - Assist committee in budget, site, transportation, logistics, etc.
 - If on-site, plan space, food/beverage, theme/decorations, etc.



- Develop/update on-site registration procedures
 - Update written procedures, with groups' approval.
 - Advise of the number and qualifications of volunteers needed to staff on-site joint registration and other volunteer functions.
 - Develop a schedule for volunteers; coordinate scheduling of personnel.
 - Train personnel on site.
- Monitor registration/reservations data; anticipate needs for changes in conference plans and work with executive directors to implement any changes that may be needed.
 - Recommend adjustments in room block, space, food, etc. as needed.
 - Coordinate/implement adjustments with executive directors or hotel.
 - Secure overflow housing, if necessary.
- Develop a plan for the most cost-effective use of low-cost/no-cost room nights
 - Gather appropriate information to make room assignments.
 - Adjust room assignments as provided with most current room block information.

C. Presenter Management

- Assist with conference presenters
 - Update presenter information materials, as determined by the executive directors.
 - Send presenter information materials to each presenter.
 - Correspond to obtain information and materials needed from presenter.
 - Ensure that proper arrangements have been made for all presenters, i.e. presenters have planned their travel, booked their room, prepared their materials, placed their AV order, submitted their bios.

D. Workshop Management

- Prepare a packet for each workshop
 - Include presenter bios which have been forwarded to conference manager.
 - Prepare workshop evaluation forms in a format as approved by the organization.

E. On-Site Management (arrive on site by Saturday, leave on Thursday)

- Train and supervise registration volunteers and other volunteer assistants
 - Work with the AV volunteer to ensure proper placement of NLEEC/NFFN-owned LCD's.
- Direct and monitor all on-site activities to achieve a successful conference
 - Direct all contractors in appropriate functions (AV, ground transportation, etc.).
 - Direct hotel in room sets, food functions, AV placement.
 - Monitor and approve all bills; settle disputes if necessary.
 - Advise executive directors of status, variations and additional needs.



F. Registration of Attendees

- Registration Program
 - Design the customized electronic registration program to correspond with ALL registration information that is requested on the conference registration form; data program will be able to report information according to any field that is represented.
- Finalize program prior to the mailing of registration brochures (February 1, 2010).
 - Design the email confirmation that will be sent automatically as a feature of the electronic registration process.
 - Monitor registrations and the process to ensure adherence to the program as well as accuracy of registration levels.
- Process conference registrations, payments and accounts receivable
 - Enter registration and payment information into database w/i 48 hrs of receipt for those who register by mail or fax.
 - Process conference payments by depositing checks in designated bank or processing credit cards within 48 hours of receipt; keep accurate deposit information. Deposit tickets and stamp to be supplied by NLIEC; credit card charges to be treated as reimbursable expense).
 - Immediately following the conference, send a packet of reports to include a report identifying registrants with balances due, to the assigned recipient. Within 10 days of authorization, invoices will be sent to those registrants in the amount approved by the designee, with payments to be forwarded to NLIEC.
- On-site Registration
 - Update database upon receipt of daily on-site registration information.
 - Invoice on-site registrants as needed, with payment to be forwarded to NLIEC.
- Attendee List Addendum
 - Prepare an Attendee List Addendum for electronic distribution on June 30, 2010.
- Registration Reports
 - Prepare weekly registration reports, based on the existing format, from March 1, 2010, through the week preceding the conference. E-mail to the executive director as well as to the treasurer of NLIEC.
 - Prepare any reports requested by executive directors from the registration information database, that will be helpful prior to, during, and after the conference.
 - Provide an electronic copy of the final registration report, including financial information, to the executive director as well as to the treasurer of NLIEC. The contractor will archive a duplicate copy for a period of five years.



- Conference Name Badges & Ribbons
 - Order conference name badge holders and inserts. Ship to the conference site.
 - Revise name badge inserts in accordance with specs provided (logo, text, format).
 - Prepare a conference name badge for each conference attendee, as appropriate.
 - Prepare a conference name badge for speakers/VIPs not attending conference.
 - Take orders for ribbons from the executive director of each organization. Place order and arrange for ribbons to be delivered in time to be inserted in conference packets as part of the packet preparation.
- Registration Packets
 - Prepare two identical copies of a conference receipt for each registrant. The “receipt” will contain registrant contact information, registration selections and payment status. A signature line will be included on the receipt and one copy of the receipt will be signed by the registrant and kept by registration desk personnel.
- Packet Assembly and Shipping
 - Fill a 6" x 9" envelope for each registrant with conference receipt, name badge insert, specified ribbon(s) and any other materials requested by executive director.
 - Ship packets to the conference site according to the site’s shipment receipt timetable.

NOTE: Reports, confirmation letters, registration packet forms and name badges will be modified by the contractor using existing documents and updating the header/logo, dates and location only. These documents will be submitted to NLIEC for approval. Any additional modifications required will be billed on a time and material basis.

- Financial Reports & Final Report
 - Reconcile all invoices
 - Prepare a final report in an approved format

G. Additional Services

The contractor will be staffed and prepared to provide the following additional services, for an additional professional fee, as an addendum to the contract. Applicable professional fees for these services would be invoiced, along with any reimbursable expenses associated with the tasks, at the time that the services are provided.

- Tuesday Reception Management
 - Coordinating/Planning Tuesday Evening Reception. Historically, the contractor provides assistance developing the menu for this event. Additional professional planning services available are:
 - Develop event theme as presented by executive director
 - Research, with input from local planning committee, and secure contract for entertainment
 - Order and coordinate delivery and placement of decorations
 - Work to assure expected ambiance is achieved.



- Workshop Management
 - Coordinate collection and assimilation of speaker presentations to allow for all presentations for a particular meeting room to be loaded, in advance, on the laptop used to service that room.
 - As part of the on-going speaker communication process, collect available electronic presentations from each speaker
 - In advance of the conference, load collected presentations, by meeting room, on a removable drive and test the process
 - On site, pre-load all presentations for each room, each day on the laptop to be used in that particular room and test the process
 - Make sure that presentations are loaded properly, open as anticipated and are easily recognizable to the speaker
 - As part of the training process, make sure workshop monitors are aware of the process and understand how to access presentations on the laptop
 - Include instructions for locating the presentation on the laptop a) as part of the room monitor checklist, b) as part of the moderator instructions and c) on an instruction card located at the laptop
 - Make sure that the workshop monitors know when and how to locate assistance for any technical issues that arise
- Planning Meeting
 - NEUAC Planning Meeting Preparation
 - Provide professional services to coordinate on-site logistics for the local planning meeting for the year 2010 for NLIEC. This fee includes correspondence and arrangements with the hotel, arrangements for meeting rooms and food/beverage and assistance with making individual sleeping room arrangements/reservations.
 - NEUAC Planning Meeting Attendance
 - Provide on-site assistance and participate in the 2010 conference planning meeting. The professional fee does not include travel expenses, which will be reimbursed to the contractor at cost upon receipt of invoice. Every effort will be made to minimize travel expenses.

Publications Management

The contractor will serve as coordinator from inception to final production of marketing pieces (teaser card, conference registration brochure, conference program).

Overall, the contractor will:

- Establish a communication process for receiving/disseminating information
 - The executive directors will offer guidance with regard to whom we should be communicating.
 - Make initial contact to establish best means of communicating and best format for transferring information.



- Develop a comprehensive timeline for each marketing piece, to include designer, printer, and mail house due dates
- Develop a checklist to accompany the timeline for each organization (NLIEC, NFFN, NEADA), which will break down the contents/sections of each marketing piece and will indicate who is responsible for supplying the text/information for that section. The checklist will also serve as an additional reminder of the due date for each segment.
- Contract and work with designer to coordinate production of all marketing pieces
 - Work with designer to develop alternative ideas around the year's conference theme
 - Work with designer to develop initial layouts for all three marketing pieces
 - Submit ideas to executive directors
 - Ensure smooth transfer process (method for transferring files)
 - Work with designer to ensure pieces designated for upload to NEUAC website are in proper format
- Select, contract and work with printers to coordinate printing of all marketing pieces
 - Select paper, inks
 - Ensure smooth transfer process (method for transferring files)
 - Review blueline; require edits as needed; review again
 - Give approval to print
 - Coordinate printer to mail house delivery
- Contract and work with mail house for mailing of teaser card and conference registration brochure; monitor mailing process and timeline
- Update and maintain mailing permit account
- Receive mailing lists/labels from all appropriate sources and coordinate transfer of lists to the mail house. Establish procedure for mailing pieces returned undeliverable or with forwarding address
- Determine, with direction from executive directors, quantities for printing (both with and without mailing permit for teaser card and conference brochure) all marketing pieces
- Determine, with direction from executive directors, quantities of teaser card and conference registration brochure to be supplied in quantity to other users
- Coordinate accounting and payment process for all vendors



Teaser Card

- Request and receive all ideas/suggestions/information for teaser
 - Format the information into a comprehensive document and forward to designer for first draft
 - Distribute draft to proofing circle/receive edits from proofing circle
 - Synthesize edits and forward to designer for final draft
 - Review final draft with executive directors and, upon approval/authorization from executive directors, forward to printer for production
- Provide NLIEC and NFFN (and others whom they designate) with electronic versions of the teaser card
- Coordinate mailing of teaser cards

Registration Brochure

- Request and receive all content information for the brochure. Content must be received by due date and must be what each organization would consider its “final” content. From this point forward, the contractor would expect to receive only minor corrections to text.
- Update conference registration form and hotel reservation form
- Secure sponsor logo(s)
- Format information into comprehensive document and forward to designer for first draft
- Distribute draft to proofing circle/receive edits from proofing circle
- Synthesize edits and forward to designer for final draft
- Review final draft with executive directors and, upon approval/authorization from executive directors, forward to printer for production
- Provide NLIEC (and others designated by NLIEC) with electronic version of brochure
- Coordinate mailing of registration brochures

Conference Program

- Prepare first draft of program text (according to timeline) for conference program
- Request and receive all content information for the program. Content must be received by due date and must be what each organization would consider its “final” content. From this point forward the contractor would expect to receive only minor corrections to text.



- Secure sponsor logo(s)
- Format information into comprehensive document and forward to designer for first draft
- Distribute draft to proofing circle/receive edits from proofing circle
- Synthesize edits and forward to designer for final draft
- Review final draft with executive directors and, upon approval/authorization from executive director, forward to printer for production
- Coordinate shipping of programs to conference hotel for arrival the week prior to the conference

Financial Reports & Final Report

- Reconcile all invoices
- Prepare a final report

Additional Work

It is assumed that each person designated by the executive directors to contribute to the marketing pieces will supply content in the format as specified in the timeline and will adhere to the timeline and check list provided by the contractor. In the event that additional services are required of the contractor for work not detailed above or as a result of the need for the contractor to provide additional services because an organization has not met its timeline responsibility, that additional work will be invoiced separately at a rate to be determined. The contractor will track overruns specific to each organization.

RESPONDING TO RFP. NO. 2008-01

Conference management firms interested in responding to this proposal should submit the following information no later than August 1, 2008:

1. A proposal describing your qualifications (or the qualifications of your conference management team) and how the Scope of Services described above would be carried out,
2. A firm estimate of fees to be charged and an estimate of expenses that would be incurred,
3. The qualifications and responsibilities of the personnel who will serve NLIEC and NFFN,
4. A representative client list and references, and
5. Financial references.



Submit proposals to:

David Fox
Executive Director
National Low Income Energy Consortium
6324 Beryl Road
Alexandria, VA 22312-6303

TIMELINE

The following timeline will apply to this process:

- Final receipt of all proposals: August 1, 2008
- Initial screening of proposals by Search Committee: October 1, 2008
- Due diligence by Search Committee on proposals taken to next level: November 1, 2008
- Presentation of one or more proposals to the boards of directors of NLIEC and NFFN: January 15-February 15, 2009
- Selection and negotiation of contact specifics: March 1-May 1, 2009
- Formal start date: October 1, 2009

If the timeline changes, the Search Committee will keep you advised.

CONTACT INFORMATION

For questions regarding this RFP, contact:

David Fox
Executive Director
National Low Income Energy Consortium
6324 Beryl Road
Alexandria, VA 22312-6303
Phone 703-642-9070
E-mail dfox@nliec.org

