

REQUEST FOR PROPOSALS

TRAINING/CONFERENCE REGISTRATION SERVICES ICF Incorporated, LLC

ICF Incorporated, LLC (ICF) is seeking a qualified firm to provide logistics and registration support services for conferences and training sessions sponsored by the U.S. Department of Housing and Urban Development (HUD). ICF expects to issue a time and materials contract for this work. Expected assignments include:

1) Logistics:

- We anticipate a total of 22 training deliveries, up to 12 of which will be held at hotels or other meeting venues. The balance will be held at HUD field offices, which provide the space and AV free of charge.
- Based on predetermined criteria, procure a minimum of 3 bids from hotels or other meeting venues for up to an estimated 12 sites; provide reports at least once a week and at times more frequently on site selection progress.
- Secure meeting space (sign contract/provide deposit, other as needed) and room blocks of 12 rooms (10 for guests, 2 for trainers) per training for up to 12 sites.
- Negotiate meeting room and audiovisual set-up, prepare and sign hotel banquet event orders, and process hotel and vendor invoices for up to 12 sites.
- Identify nearby hotels and prepare a nearby hotel list for website posting and distribution for trainings conducted at up to 10 HUD Field Office or other ICF negotiated venues.
- Provide copies of all hotel contracts to ICF for training files on a monthly basis.
- Subcontractor should have the ability to track and invoice individual meeting expenses (i.e. shipping, meeting room rental, audiovisual, drayage) by subtask (e.g., by training delivery) for up to 22 trainings.
- Subcontractor will purchase supplies for and maintain trainer boxes.

2) Registration:

- Using an online registration system provided by ICF, process participant registrations and confirmations for up to 22 trainings; process and confirm additional registrations via fax or mail as necessary.
- Based on pre-determined criteria provided by ICF, send acknowledgement, confirmation, denial and reminder e-mails/letters as appropriate; place registrants on a waitlist or in pending status as necessary based on criteria provided by ICF.
- Provide weekly registration reports to include registration, waitlist summary report of all classes and a red flag report. Red flag reports serve to identify registrants who may not meet established eligibility criteria to attend.
- Send update e-mails to registrants as necessary/requested by ICF (typically 2-3 per training).
- Update and maintain registration criteria and Q&A documents at the direction of ICF.

- Prepare a final registration list for each training for inclusion in each trainer box.
- Prepare and send out to ICF weekly email updates with a full list of registrants (including waitlist) and participant numbers for each course, as well as a weekly summary for all upcoming trainings.
- Prepare a 1-week out and a 1-day out report for each course.
- Prepare a close out report for each training with a final listing of attendees, to be sent no later than 2 weeks after completion of the training.
- Update the website as needed with all training course descriptions, dates, and other pertinent course information; maintain the website as requests for information updates are provided by ICF.
- Provide ongoing updates to the attendee database; be prepared to provide an attendee list to ICF as needed.
- Answer basic participant registration questions via phone and email.
- Coordinate with and report to ICF's Logistics Manager(s)

The selected firm should have experience securely processing both online and paper registration payments. The following link shows the current registration system:
<http://www.hometa.info/>.

The selected subcontractor will work on a task assignment basis under our Community Development Technical Assistance cooperative agreements with HUD. There will likely be a fixed number of nationwide training deliveries that may be known for up to a year in advance of the planned sessions. In addition, there will be deliveries that are requested on an on-going basis from various HUD Field Offices and these may have a shorter turn around time. Our standard is that registrations must be entered and acknowledged within 48 hours of receipt and a confirmation email/fax sent within 24 hours of HUD approval. Phone or fax inquiries for information must be responded to within 24 hours of receipt.

3) Trainer Boxes (See attached)

- Purchase and maintain inventory of trainer box supplies.
- Prepare a trainer box with all applicable materials (per trainer box instructions) for all training sites to arrive no later than 2 days prior to the training. Trainer box materials should be sent 2-day FedEx each way whenever possible.
- Track packages and provide tracking number to ICF upon shipment.
- Troubleshoot shipment issues and alert ICF should they arise.

4) Evaluations

- Prepare evaluation forms for each training to be included in trainer box.
- Using an ICF-provided Excel template for scoring, process attendee evaluations within 14 days of receipt of evaluations. Send hard copy evaluations and summaries to ICF once a month.

Contractual Obligations

The time and materials contract with the selected firm will initially be for one year, with an option for one additional year. We estimate that there will be 22 training sessions with up to 70 participants each. Additionally, the selected contractor is expected to have sufficient surge capacity to be able to handle up 500 registrations in a single month.

Because this work is conducted under a federal grant, the selected logistics contractor may not charge any fee or profit above its fully loaded costs for this work, and must provide written

certification to that effect and that its charges for this work are typical of what is charged to the firm's other clients. Work is expected to begin in November/December 2011.

Invoices must be submitted on a monthly basis by task/subtask; invoices should include a detailed narrative by task of the work performed during the invoice period. Invoices should be received by ICF by the 15th day of each month.

A. PROPOSALS MUST BE

1. Submitted electronically as a Word or PDF document.
2. Received no later than **3:00 pm EST on Friday, November 11, 2011** via email at HOMetrainings@icfi.com.
3. Responsive to all the submission items outlined below; and
4. Inclusive of a completed and signed certification regarding the firm's cost reasonableness (see the attached form).
5. Questions must be received by **12 noon EST on Thursday, November 3, 2011**. Questions must be emailed to HOMetrainings@icfi.com.
6. To ensure bidders receive all questions and answers, please send an email to HOMetrainings@icfi.com indicating your intent to bid by **12 noon EST on Thursday, November 3, 2011**.

B. SUBMISSION CONTENT

Firms are required to submit one electronic copy to ICF at HOMetrainings@icfi.com on or before the date indicated above. All responding firms must submit the following information for consideration:

- 1) Summary of corporate qualifications for the firm (maximum of 5 pages).** This qualifications summary should specifically indicate the years that the firm has been in business, its areas of expertise, total number of staff at the firm and its typical clients.
- 2) Summary of the firm's previous expertise specific to training and conference logistical support (maximum of 3 pages).** This summary should provide three to five brief project descriptions indicating similar types of large, on-going training logistical efforts. These project descriptions must describe work that was completed within the last five years (or is on-going). It is preferred but not required that this previous experience be related to federal contracts. Each project description should indicate the client, describe the firm's scope of work, and indicate the number of training sessions or conferences managed.
- 3) Proposed systems and staffing (maximum of 3 pages).** This section should describe the firm's capabilities to handle logistics and registration services for multiple trainings simultaneously. An intensive level of effort is expected within 2 months of

contract execution as site selection for the trainings that require hotels or other private venues takes place. Quick turnaround times are of the essence in order to market trainings and open these for registration. Also, please indicate the firm's ability and commitment to using green materials in the trainer boxes, and reusing and/or recycling materials.

The firm should describe any other systems, processes or facilities that it brings to these logistical/registration tasks and provide a link to an existing event/registration site. This section of the proposal should also list the proposed staff and their planned roles on the project.

4) Resumes of proposed staff (resumes limited to 1 page each). The resumes should indicate the applicable experience and education of the proposed staff.

5) References. The firm must provide at least three corporate references from current or past clients within the past 2 years. If possible, please provide a range of contract sizes and clients (e.g., federal government, local government, nonprofit, for profit).

6) Cost letter and certification. This letter must list the fully loaded hourly rates for any proposed labor category and map the proposed staff to their appropriate category/rate. In addition, the cost letter shall indicate any overhead rate if such a rate will be applied to other direct costs, such as materials, communication costs or other pass-through expenses. The proposal must include a signed certification that the proposed rate is consistent with the best (lowest) customary rates charged to other clients, and that the proposal rate does not include any increment above cost. See the attached template for that certification. Two certifications are provided, one for federally audited firms and one for firms that are not federally audited. Complete the certification form that applies to your organization.

7) Cost proposal for the following sample scenario. (Provide an itemized estimate of your labor cost only, including labor categories and fully-loaded labor rates, to undertake the following scenario.)

Training Scenario (price labor costs only)

Training Name: HOME Certified Specialist Administration

Training Location: Chicago

Dates: June 18-20, 2012 (3 days)

Number of Attendees: 70

F&B: No

Room Block: 12 rooms per night (3 nights)

Space Needs: 1 room, minimum 1500 sq. ft.

Attrition: 80%

A/V: Projector, Screen, 2 lavalier microphones; flip chart with markers

Room Set-Up: Classroom, 2 per table up to 70 participants; table up front for presenters and table outside for registration

- Secure a minimum of 3 bids for selected location meeting predetermined criteria (i.e., no airport properties, within walking distance of eateries; rooms cannot be long and narrow, no columns in rooms)
- Provide report with detailed site responses; update this report twice.
- Provide responses to sites on selection decision.

- Review contract to ensure best interest of the government is being met; send to ICF for final review and approval; sign contract with hotel.
- Review ICF provided marketing material to ensure all hotel details are correct.
- Take care of any pre-payments/deposits required by the site.
- Test room block to ensure it is set up properly.
- Negotiate meeting room and audiovisual set-up, prepare and sign hotel banquet event orders, and process hotel and vendor invoices.
- Monitor room block and inform ICF if possibility that room block may not be met; or work with hotel in the event more rooms are needed. Review rooming list to ensure trainers have made reservations; if trainers do not have reservations, alert ICF.
- Update website with two new course changes such as updating course description, uploading a new agenda, etc.
- Open course to take registrations; monitor registrations daily.
- Review registrations to ensure they meet criteria, place into waitlist/red flag or other pending status as appropriate.
- Answer questions from participants; work with ICF staff to craft responses.
- Prepare weekly registration reports four times (general registration, waitlist, registration summary and red flag)
- Email denial letters to four registrants who do not meet eligibility criteria.
- Once the training reaches the minimum threshold of 25 participants, send out electronic confirmations.
- Update website to close registration when class is full.
- To maintain contact with those on waitlist as to status, email two messages to up to 25 persons on the waitlist
- Send reminder emails to registrants as class date approaches with final details.
- Assuming 5 cancellations, move over waitlisted people to registration list.
- Prepare a 1 week out registration report and a 1 day out registration report
- Prepare, ship and track trainer box; track return of trainer box.
- Prepare final closeout report.
- Process evaluations from training including entering individual scores into template and inputting all narrative comments.
- Send hard copy evaluations, hotel contracts and other vendor invoices to ICF at month's end.

C. SELECTION CRITERIA

ICF recognizes that procuring professional services is different than procuring materials, equipment and supplies. The cost of professional services, although an important factor, will not be the sole consideration.

The following selection criteria will be used:

1. Firm's qualifications/experience and past experience of proposed staff (60 points)

- a. Demonstrated previous experience of the firm in providing registration and customer support services for similar training sessions and events. (20 points)
 - b. Demonstrated capacity and proven experience of the firm's logistical systems and processes and proven ability to handle fast turn-around requests. (20 points)
 - c. Demonstrated ability of specifically named key personnel to carry out the proposed assignments. (20 points)
- 2. Cost – range of fees for personnel and cost effectiveness of the price for the sample training scenario. (20 points)
 - 3. Feedback from references provided by the firm. (20 points)

ICF Incorporated, LLC

**Subcontract Certification for
U.S. Department of Housing and Urban Development
Community Development Technical Assistance Grants (CD-TA) for Non-Federally
Audited Entities**

I, [insert name and title] of [insert company name], hereby certify that for work performed for ICF Incorporated, LLC under the Community Development Technical Assistance grants [insert company name] will not charge any increment above cost (e.g., no fee or profit). I also certify that the rates [insert company name] will charge to ICF Incorporated, LLC are consistent with the best (lowest) customary rates that have been negotiated with our other clients.

Signed:

Date:

ICF Incorporated, LLC

**Subcontract Certification for
U.S. Department of Housing and Urban Development
Community Development Technical Assistance Grants (CD-TA) for Federally Audited
Firms**

I, [insert name and title], hereby certify that [insert company name], is a federally audited entity. I also certify that all rates are approved/recommended federally negotiated indirect rates at no increment above cost (e.g., no fee or profit) for work performed for ICF Incorporated, LLC by [insert company name], under the Community Development Technical Assistance grants

Signed:

Date:
