



<http://nordp.org>

Formal RFP Name: Event Planning Contractor for the National Organization of Research Development Professionals (NORDP)

NORDP Contact: President@nordp.org

BACKGROUND INFORMATION

The National Organization of Research Development Professionals (NORDP) is a robust and growing all-volunteer organization comprising a national peer network of research development professionals.

The mission of NORDP is to advance the global capacity for and impact of research by strengthening the practice and profession of research development.

Established in 2010, NORDP grew from an informal network to more than 1,000 members across the globe. The membership represents a diverse set of institutions and sectors. NORDP is organized and operated exclusively for charitable and educational purposes in accordance with section 501(c)(3) of the Internal Revenue Code.

NORDP relies heavily on an engaged volunteer base, via several committees and working groups. The elected Board of Directors provides governance and strategy for the organization, while a management group provides support staff.

NORDP's signature event is an annual meeting. This event draws approximately two thirds of our membership (consistently increasing in registration numbers over the past several years) for three to four days of networking, workshops, presentations, and keynotes. NORDP is requesting proposals from an events management organization to provide in-person, online, and hybrid event management. We are extremely interested in an event management organization that can work closely with our organization to design events in partnership with organizational leadership and FirstPoint Management Resources, NORDP's organizational management company.

This Request for Proposals (RFP) solicits proposals from companies to assist in event management for upcoming conferences. In future years, the successful awardee will assist in city, site, and venue selection. The successful management company will assist in venue contract negotiation, event registration and management, and event advertisement (among other activities) for at minimum two years with the an renewal option for up to five (5) years.

NORDP has agreements with venues for some, but not all future conferences as follows:

- May 2-5, 2021 – Arlington Virginia (Hyatt Regency)
- April 23-28, 2022 – Bellevue Washington (Hyatt Regency)

TIMETABLE

Event	Date
RFP Issue Date	June 8, 2020
Questions & Requests for Clarification (Please submit via email to President@nordp.org)	June 1, 2020 – June 30, 2020
RFP Proposal Due Date	July 15, 2020
Notification of Apparent Winner/Provisional Award*	July 31, 2020
Estimated Contract Execution Date	August 31, 2020
Commencement of Engagement	September 1, 2020
Review/Renewal/Close Date	September 1, 2022

* Award of contract is subject to NORDP's and Respondent's ability to agree on contract terms in a timely manner.

A. PROPOSAL FORMAT

Please complete the following sections in the order stated. Respondents do not need to bid on all areas if it is outside their expertise or experience, but please clearly state that you are not bidding for a particular section or activity. The completed proposal should be no longer than 20 pages (Arial or Times New Roman, 1" margin all sides), and include sections B (Executive Summary) through F (Vendors Contacts) only. The completed vendor worksheet should be included in the final submission and will not count toward the page limitation. No other appendices should be included.

B. EXECUTIVE SUMMARY

Please provide an executive summary that highlights specific strengths, and how those strengths transfer into value for NORDP (see our website for additional background on our organization or the end of this RFP).

Include a company profile that covers:

- A brief history, organizational structure, number of staff, and general overview of your company and service philosophy. Include your organization's commitment to diversity and inclusivity and how it is embodied in your work with clients and within your organization.
- A summary of your most relevant experience, including the number of clients and size of events you are currently managing.
- Describe characteristics that separate your company from your competitors.

C. SCOPE OF WORK

1. Event Strategy & Implementation

Please describe your experience with event strategy and implementation.

- Describe your organization's ability to publicize, design, and implement an event. Specifically describe your ability to manage a virtual or hybrid event.

- How can you help us use our annual meeting to meet organizational goals and objectives, while increasing the number of attendees year over year?
- Describe the frequency, duration, and design of communication with your client's leadership and membership. Include a description of your organization's planning cycle.
- Include a description of your organizations' implementation plans and benchmarks for a successful event. Please give examples of these as appropriate.
- Describe your organization's ability to foresee and accommodate significant changes in conference attendance and registration from year to year (e.g., increase or decrease).
- Describe your company's experience with adjusting to politically sensitive legislative actions made by states or federal guidance that could potentially impact conference success.

2. Conference Management

Please describe your experience with conference management.

- *Site Selection & Negotiation:* Please describe your experience in developing RFPs for meeting sites and negotiating contracts with hotels.
 - Include any financial relationship with the venues you work with.
 - Include any experience with contract termination and the outcome(s) for your client.
 - Include any examples of when sites were selected through optimization for either budget, registration, attendance, or event objectives.
- *Budget Planning and Cost Control:* Please describe your strategies for budgeting, keeping costs low, adjusting to dynamic costing issues, and risk mitigation strategies for cancellations. Include how frequently you meet or are below estimated budget for events.
- Describe your approach to meeting logistics and facility management, including audio visual management.
- Describe your approach to sponsor management and working with external vendors and service providers before and during the event. Specifically address how this work is incorporated into event timelines, communications planning, and budget.
- Describe your approach to onsite event management.
 - Include communication planning with client leadership, conference organizers and membership.
 - Include how your organization meets or exceeds milestones set out as part of the project planning process.
 - Include your preference for site visits and "run throughs".
 - Include how you accommodate for schedule and budget challenges in real time.
- Describe the format or platform for event management (on-site and mobile interface) inclusive of attendee registration, conference agenda distribution, connecting event attendees to each other and the event itself, and post event wrap up and follow up.

3. Content Development

Please describe your experience with developing conference materials.

- Describe how your organization regularly incorporates innovations in or strategies for conference functions and events, including education & exhibition components, executive functions, networking events, and keynote speakers.
- Describe how your organization facilitates abstract management. Include how your process allows for timely electronic calls for papers, reviewing, and scoring for submissions.
- Describe your organization's ability to incorporate client's existing membership management platforms.
- Describe your experience with and approach to program document design (electronic and physical distribution).
- Describe post-event support for attendees and the client, e.g., reporting on metrics, presentation posting, recordings of sessions, attendee lists, evaluations, etc. Please include how your organization can provide a final report on adherence to contract expectations.

4. Strategic Sponsorship / Exhibit Sales & Management

Please describe your experience with conference sponsorship, exhibit sales, and management of exhibits.

- The NORDP Conference Committee, in partnership with Strategic Alliances Committee, expects to be the primary contact with sponsors for events, with substantial support from the events management organization and FirstPoint Management Resources.
 - Please describe your organization's capability to complete prospect research, collateral development, marketing and communication planning, and other activities that expand the number and levels of sponsorships for events in a collaborative environment such as this one.
- Describe your experience with developing innovative, engaging, and interesting content for exhibitors/sponsors.
- Describe how your organization can partner with NORDP to identify and manage sponsorship year over year to increase conference revenue and long-term sustainability of the relationship. Please include an example.

5. Public Relations/Marketing/Communication

Please describe your experience with conference and event public relations, marketing, and communication.

- Describe how your organization can manage or contribute to website design and management; social media marketing; direct mail design, printing, and mailing; email distribution; and/or media relations.
- Describe any experience with search engine optimization and/or pay per click tools. Include an example of how this work impacted conference attendance for any or all of your clients.
- Describe any experience with developing, branding, and distributing attendee "take aways" or other items.

D. VALUE ADDED

Please use this section to propose additional services related to the scope of work that are not specifically outlined in this RFP within the page limitation.

E. FEES/PRICING

Describe your pricing structure for annual engagement or provide costs associated with each of the categories in

which you applied per annum. All estimated costs should be estimated by line item. Provide all estimated costs related to travel, per diem, staffing, etc. for all proposed milestones and activities. Include payment schedule where appropriate. Include pricing scale based on service level/module where appropriate. Include cost savings for multi-year contract where appropriate. Provide explanation of flat rate services and negotiable costs. Describe how your organization will work with NORDP to determine an optimized event budget, depth, breadth, and frequency of event expense reporting alongside milestones.

F. VENDOR'S CONTACTS

Management Plan

Describe the team that will be assigned to deliver services/goods to NORDP. Describe staffing and roles for activities pre-event, post event and on-site event management. Describe individual roles, responsibility and briefly detail credentials and related experience. Describe frequency, depth, and overall content of communications with client leadership during the design and execution of the planned event(s). Describe your relationship and management with volunteers throughout the process of event planning and execution. Describe your approach for conflict resolution with a client.

Conflict of Interest

Describe how your company identifies potential or actual conflicts of interest. How does your company mitigate any potential harm to your clients?

Risk Management Plan

Describe how your company identifies risk(s), its likelihood, and designs mitigation plans around those risks.

G. CRITERIA & EVALUATION

The evaluation process may occur in a different order than reflected below:

- Step 1: Responses will be evaluated for completeness and ranked according to compliance with NORDP's stated specifications. At NORDP's sole discretion, we reserve the right to limit further participation based upon this evaluation.
- Step 2: Proposal evaluation by NORDP's Revenue & Finance members and other subject matter experts.
- Step 3: One or more qualified finalists may be interviewed prior to final selection.
- Step 4: One or more finalists may be asked to respond to supplemental questions or participate in additional presentations, interviews and/or site visits prior to final selection.
- Step 5: A final decision will be made based on all quantitative and qualitative information available to NORDP, including the formats above as well as NORDP's internal knowledge and experience.

Scoring Matrix

The scoring matrix will be completed for each category in which the vendor applies.

Category	Score
Executive Proposal Summary (section B)	10
Scope of Work/ Technical Proficiency (section C)	50
Value Added (section D)	15
Fees/Pricing (section E)	20

Vendor's Contacts (section F)	5
Total	100

H. SUBMISSION REQUIREMENTS

Interested Respondents must submit the following: **One (1) electronic copy of proposal** submitted as a **single** PDF file organized in accordance with the Proposal Format (sections B through F) and the Vendor Worksheet. Additional documents submitted electronically but not part of the single RFP response (brochures, etc.) will not be considered. Please email responses to President@nordp.org by the date specified.

**** End of RFP ****

What is Research Development?

Research Development encompasses a set of strategic, catalytic, and capacity-building activities that advance research, especially in higher education. Research Development professionals help researchers become more successful communicators, grant writers, and advocates for their research. They help researchers bring new ideas to life.

Research Development professionals also serve their institutions. They create services and resources that transcend disciplinary and administrative barriers and create programs to spur discovery.

Vision

A robust, national peer network of Research Development professionals that enhances competitive multi-, inter- and transdisciplinary research.

Mission

The mission of NORDP is to advance the global capacity for and impact of research by strengthening the practice and profession of research development.

NORDP Organization and History

NORDP is organized and operated exclusively for charitable and educational purposes in accordance with section 501(c)(3) of the Internal Revenue Code and is incorporated in the state of Illinois. The Board of Directors is an elected body and holds elections each May.

NORDP was established in 2010 as part of a grassroots movement to build a community of Research Development professionals driven to enhance the research enterprise at their institutions. The organization grew from an informal network of individuals engaged in research development activities at universities and research institutions across the United States and is now more than 1,000 members strong, representing a diverse set of institutions and sectors, and including RD professionals from multiple countries from around the globe. Beginning in 2010, NORDP has held an annual conference that brings together its members and others—

and from these conferences, the organization has developed new initiatives, new strategic partnerships and new forms of knowledge.

Commitment to Inclusive Excellence

NORDP is committed to fostering foster a culture of inclusive excellence by actively promoting and supporting diversity, inclusion and equity in all its forms to expand our worldview, enrich our work, and elevate our profession.

Commitment to Sustainability

NORDP is committed to creating sustainability across the spectrum of our events and interactions to ensure that we have the highest impact on our membership with the lowest impact on our planet's resources.

VENDOR WORKSHEET

Vendor Primary Representative:

Name of Representative: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

E-mail: _____

Vendor's Reference Worksheet

Using the format indicated below, please provide a list of at least three references for past performance.

Organization Name: _____

City: _____ State: _____

Primary Contact: _____ Phone: _____

Job Title: _____ Email: _____

Organization Name: _____

City: _____ State: _____

Primary Contact: _____ Phone: _____

Job Title: _____ Email: _____

Organization Name: _____

City: _____ State: _____

Primary Contact: _____ Phone: _____

Job Title: _____ Email: _____