1. Project Background

The Education Performance Improvement, Communications, and Knowledge (EPIC) project is a five-year program of support services managed by the Education Policy and Planning Division (EPP) in the E3 Office of Education. Framed within the overall goals of the USAID Education Strategy, EPIC consists of support services in four key areas that will be implemented simultaneously:

- Performance improvement through organizational effectiveness
- Professional development and learning
- Communications
- Knowledge management

2. Purpose

The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified event planners to provide logistical, coordination, and event management support for the Office of Education’s 2017 State of the Art (SOTA) Conference, for which the EPIC project is charged with planning, tentatively scheduled for October 30-November 3, 2017.

The SOTA, previously known and executed as a USAID Global Education Summit, is a biennial event intended to bring education practitioners from the global community and stakeholders from USAID missions, representatives from the U.S. government, partner countries’ Ministries of Education, NGOs, and think tanks together to discuss and share best practices that underscore education as one of the ways to prevent and mitigate conflict and violent extremism, promote economic growth, and end extreme poverty.

Preliminary event details include:

- Dates – October 30 – November 3, 2017 (tentative)
- Location – Hotel with conference facilities in the District of Colombia, Maryland, Virginia (DMV) area
- # of participants – Day 1 ➔ up to 600 participants, Days 2 through 5 ➔ 150 -200 participants
- Participant Demographics – USAID Washington-based and field-based staff traveling from over 40 USAID missions worldwide

3. Scope of Work

The event planning and management support firm or individual for the SOTA should bring a creative and strategic lens to the coordination, planning, and event management processes. As
a thought partner throughout the pre-, during, and post-SOTA phases, the firm or individual should be poised to participate in regularly scheduled planning meetings and conference calls held by the SOTA Planning Committee to offer innovative and interactive event coordination practices to ensure the delivery is state of the art.

A. SOTA Presentations and Program
   a. Coordinate with day and session leads to support “Call for Presentations” process of the SOTA Planning Committee.
   b. Communicate with presenters, including Keynotes, Workshops, Paper, Panel, and Poster; keep presenters apprised of the program schedule and additional logistical information.
   c. Liaise with presenters to ensure all audiovisual (and other) requirements are accommodated and presentation descriptions and presenters’ bios are submitted in timely manner.
   d. While the SOTA schedule will be determined by the Planning Committee, the individual or firm selected will implement any necessary adjustments to accommodate cancelations, availability, etc.

B. On-site Services
   a. Liaise with, and/or advise as required on the supply of all on-site services as required, including the coordination of audiovisual requirements (including pre- and post-SOTA); session recorders; printing of conference materials; signage; and other applicable materials and supplies.
   b. Set up a dedicated exhibit space for 10-25 exhibitors, including a table, internet connection and power strip, and space for participants to walk around and hold informal discussions comfortably.
   c. Set up a boardroom-style conference room for side meetings that can comfortably hold up to 10 people in an area that is quiet, easily accessible, and has internet available.
   d. Ensure a dedicated meeting planner office space with capacity to store items (meeting supplies, materials, equipment, etc.) overnight.
   e. Propose and implement rational staffing, including “surge capacity” staffing during the first day of the conference, when 600 participants are expected.
   f. Liaise with venue personnel and/or provide counsel related to catering, facility management, and other relevant and required services.
   g. Liaise with venue personnel to ensure all rooms meet specified and agreed upon requirements.
   h. Liaise with venue personnel to ensure a “business center” space where at least three computers are set up to allow participants to check their email, send messages, etc.
i. Assist in the identification of event signage requirements and organize production of the same.

j. Use sound judgment during the decision making process, keeping the Planning Committee apprised of any implications.

C. Marketing and Communications
   a. Propose an online solution and use it to send and manage invitations, RSVPs, registration, etc.; provide solutions to invitees and act as troubleshooter as necessary.
   b. Lead on the development of all digital and non-digital marketing materials related to the event, including, but not limited to, save the dates, invitations, event programs, invitations, event signage, etc.
   c. Work with partners and other agencies, to be identified, to promote the SOTA through traditional and online channels.
   d. Assist the engagement team with additional tasks when required.

D. Administration and Management
   Pre-Event
   a. Liaise with the Office of Education representatives to understand the requirements of the SOTA (this can be through email correspondence, conference calls, and/or face-to-face meetings).
   b. Lead logistics efforts, to include:
      i. Determining conference room layout to best utilize space
      ii. Coordinating and confirming audiovisual needs and delivery
      iii. Coordinating services required by venue such as Wi-Fi access and equipment rental
      iv. Preparing written specifications for room arrangements and audiovisual needs
      v. Organizing catering to include daily break service mid-morning and mid-afternoon, and lunch service daily (box or buffet as appropriate), with one vegetarian option provided for each meal.
      vi. Maintaining an accurate RSVP and attendance list of participants, facilitators, and presenters
      vii. Upon request, assisting in hotel bookings, flights, and land transportation arrangements for participants
      viii. Monitoring room block and hotel reservation deadlines
      ix. Making special arrangements as necessary
      x. Posting pertinent information on the site or relevant online platform to provide SOTA logistics information such as agenda, accommodations, directions, and other information; monitor online information as needed
xi. Developing, coordinating, and assembling name tags, table tents, and event packets (physical and/or virtual) with relevant SOTA information

xii. Organizing a reception for participants at a day/time specified by Planning Committee

xiii. Organize and manage the informal meeting space for participants

xiv. Organize and manage VIP meeting space and catering for high level meetings with delegates and Ambassadors

c. Prepare updates for planning meetings and coordinate required follow-up activities.

d. Collaborate with the Planning Committee to develop a strategic plan for utilizing interactive and innovative activities and engagement techniques throughout the SOTA; provide expert advice on best practices.

e. Employ technology in a thoughtful manner.

f. Propose and obtain participant take-aways.

g. Manage the production of SOTA participant binders/notebooks with SOTA material.

h. Manage the production of the SOTA agenda brochure.

**During SOTA**

i. Provide at least one on-site coordinator for the duration of the SOTA and pre-event workshops to manage on-site logistics related to: exhibit space; greeting delegates; meeting facilities; session staging; audiovisual needs; catering; and directional signage.

j. Oversee and manage all contractors appointed for the SOTA.

k. Provide surge capacity staff as needed for the implementation of the SOTA.

l. Manage and conduct registration.

m. If applicable, organize a note taker to provide written reports of proceedings.

n. Coordinate the placement of signage in designated areas to reflect the current session in progress in each breakout room.

o. Contact the audiovisual supplier’s on-site technicians immediately in response to technical difficulties that may arise and ensure that such matters are resolved to the satisfaction of the session’s presenters, facilitators, and delegates.

p. Carry out other tasks as they arise in order to ensure a smooth event from start to finish.

In addition, the individual or firm will:

A. Utilize local resources to the maximum extent.

B. Consider gender, culture, and equity.

C. Be flexible and adaptive.

D. Ensure environmental management and compliance.
E. Provide clear, concise, and timely reports meeting counterpart and USG requirements.

4. Proposal Requirements

Proposal Instructions

All offerors must submit the following information:

1. TECHNICAL PROPOSAL:

1A. Experience and Staffing (MS Word or PDF; up to 13 pages)

- **Corporate Overview** – Legal name; year of incorporation; number of employees. (1 paragraph)
- **Services** – Description of all services and products supplied. (up to 2 pages)
- **Markets Served** – Description of geographic/industry markets served. (up to 2 pages)
- **Partners** – List of current event-related vendors and partners. (1 page)
- **Past Performance** – Description of up to 5 events similar in size and complexity to the 2017 SOTA that the offeror has planned and managed in the last five years; include references for each event including the name and contact information for each event client. (up to 5 pages, 1 page per event)
- **Event management schedule and work breakdown structure** – Include a timeline for major project phases and key milestones
- **Staffing plan** – Provide a proposed staffing plan to coordinate and manage the 2017 SOTA event.

1B. Resumes (MS Word or PDF; up to 2 pages/resume)

Include resumes of those individuals that are proposed to work on this event.

2. COST PROPOSAL:

2A: Budget (MS Excel or PDF)

- **Estimated budget and resources required** – Proposals should include cost estimates related to the general categories of tasks outlined in the Statement of Work. Budgets should include the following budget categories:
  - **Labor including salary and wages**: Labor estimates should include level of effort estimates for each proposed personnel along with their proposed daily rates.
  - **Transportation**: Include local transportation costs (parking, taxis, etc.) Do not include participant and speaker travel estimates in proposed budgets.
  - **Other Direct Costs**: ODC estimates should include the following line items at a minimum. Additional line items can be added if deemed necessary. Do not include venue and catering costs in your budget submissions.
- Graphic design for signage and conference materials
- Printing/photocopying (to include conference materials and signage)
- Materials and supplies
- Software including registration platform
- Telephone/communication costs
- Audio Visual (A/V) equipment
- Transcription
- Surge capacity staff

**Event Planner Indirect costs and fees:** Include any indirect costs or management fees associated with your organization.

2B. **Budget Notes** (MS Word or PDF)

Budget notes should provide a brief description of how the above costs were computed along with any budget assumptions.

**Evaluation Criteria**

All proposals will be evaluated systematically against the following key evaluation criteria:

- Demonstrated understanding of the scope and complexity of the 2017 SOTA
- Previous experience and demonstrated capabilities coordinating and managing similar sized events
- Availability of personnel resources to manage all aspects of a large-scale event
- Partnerships and access to vendors and surge capacity resources for implementation of key SOTA functions
- Budget reasonableness

5. **Questions**

Questions on this RFP should be submitted to Adriana DelGizzi by **Wednesday, December 7, 2016** at ADelGizzi@trg-inc.com.

6. **Closing Date**