



EVENT PLANNING, MANAGEMENT, AND FACILITATION SUPPORT REQUEST FOR PROPOSALS

Annual EFC Convening
Planning and Management & Facilitation Support (RFP 2024-EI4)

US Water Alliance
Director, Environmental Finance Center
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July 2024

Request for Proposals

Annual EFC Convening
Planning, Management, and Facilitation Support

Date of Request: July 15, 2024

Submissions Due: July 29, 2024, 8:00 pm ET

Questions Due: July 22, 2024, 3:00 pm ET

Background

The US Water Alliance (Alliance) hosts annual convenings for BIL EFCs. EFCs, or Environmental Finance Centers, are technical assistance (TA) providers designated by the Environmental Protection Agency to help communities across the country access federal funding for infrastructure projects that protect public health, safeguard the environment, and advance environmental justice. The second annual convening will take place in spring 2025. This convening will serve as a continuation of ongoing efforts to facilitate EFC-to-EFC collaboration, focused on breaking down silos and improving coordination. This event will build on networking and relationship-building activities carried out during the first annual convening held in 2024 and quarterly peer learning meetings. To support this effort, the Alliance seeks consulting services for event planning and group facilitation on an annual basis through 2026.

Scope of Work

The Alliance is requesting proposals from consulting firms for event planning and facilitation for at least two multi-day events, held during three-day periods in 2025 and 2026 (specific dates to be determined). Applicants may elect to apply for one or multiple scopes of work listed below.

• **Event Planning & Management**

- Find an appropriate destination for the 2025 convening that meets the location needs by no later than August 30, 2024.
- Reach out to multiple venues for pricing information and availability.
- Present options to our team and work with us to select a preferred location.
- Identify:
 - Potential outdoor social excursions
 - Possible after-dinner activities/amenities
 - Potential off-property dinner venues that can accommodate the larger group
- Negotiate room rates and hotel blocks.
- Work with the venue to coordinate logistics including catering, meeting space(s), and other elements essential to the event design.
- Support our team on the ground with implementation of the event (e.g., liaising with venue staff, coordinating other logistics, etc.).

- **Group Facilitation**

- Attend pre-planning meetings with the team to finalize agenda, goals, and exercises.
- Attend the convenings and facilitate activities (location TBD).
- Lead discussions and help participants share and learn from each other by promoting a productive and inclusive environment. This may include:
 - Proposing suggestions
 - Motivating participants
 - Managing participant expectations and providing redirection when needed
 - Responding to the culture of the group
- Submit a written summary after each convening and debrief with the team.

RFP Process

All proposals must be **emailed to Erin Riggs at efc@uswateralliance.org by Monday, July 29, 2024, no later than 8:00 pm ET**. Proposals should be submitted as a single, multi-paged electronic PDF. Prospective consultants may submit questions about this RFQ to efc@uswateralliance.org. The deadline for questions is Monday, July 29, 2024, at 3:00 pm ET.

Submission Requirements

Prospective consultants and/or any sub-consultants must present satisfactory evidence to the Alliance indicating their ability to meet the scope of services. To ensure consistency, responses should not exceed five pages and must include:

- 1. Cover Letter:** Each consultant must include a cover letter that identifies the consultant, their place of business, the name, email address, and telephone number of the primary contact person, and a summary of interest in this RFP. Include a statement of qualifications that contains a brief summary of experience and skills.
- 2. Work Samples:** Summarize a minimum of two (2) recent examples of work (short paragraph descriptions).
- 3. Fee:** Provide a budget that includes all anticipated costs and fees associated with planning and executing the scope(s) of work listed above, per year. All anticipated expenses should be provided in an itemized table with all hourly rates for services included.

Evaluation

The Alliance will review all submissions and select the most qualified proposals. Successful consultant(s) will enter into a written contract for the scope of services provided.

Additional Requirements

All contractors will be subject to compliance requirements under federal law. Conditions of the contract will require that contractors do not participate in the development of procurement specifications or

other activities while providing technical assistance that violate the provisions in 2 CFR 200.319 on full and open competition for federally funded contracts.

The Alliance reserves the right to reject any proposal and to waive any and all formalities, irregularities, or technicalities. The Alliance reserves the right to select the firm(s) that best meets its needs and negotiate a final contract and task order(s). The Alliance is not responsible for any costs or expenses incurred by any firm in submitting a response to this RFP.