



## Request for Proposals

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**University Economic Development Association  
Annual Summit 2018 & 2019 Host University/Consortia Partner**

**Posted on: December 15, 2017**

**Responses due: 5:00 PM EST, February 7, 2017**

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\*Note: This proposal includes a supplemental Excel file, which should be completed as part of the proposal process.

## 1.0 Background

### 1.1 About the University Economic Development Association

Established in 1976, the University Economic Development Association (UEDA) is the cornerstone membership organization representing higher education, private sector and community economic development stakeholders. UEDA works to expand economic opportunity in our communities by leveraging research, community resources, campus planning, talent development, and technology commercialization.

#### **Mission**

UEDA's mission is to serve its members by advancing knowledge and practice in economic engagement by institutions of higher education.

#### **Vision**

UEDA will be recognized as the pre-eminent association for higher education engagement in economic development.

UEDA has approximately 160 member organizations representing the university-related economic development sector, including nonprofits, community economic development organizations and for profit companies, however its core membership is comprised of U.S. institutions of higher education. More information is available at [www.universityeda.org](http://www.universityeda.org).

### 1.2 About the UEDA Annual Summit

Each year, content experts across the university-based economic development domain convene to share ideas and best practices in regional economic development. Participant goals at the Annual Summit include:

- Examine the cutting-edge practices of colleagues as they compete for Awards of Excellence—you judge the best of the best.
- Build a learning network of colleagues to identify opportunities, develop partnerships, and ultimately tailor and apply best practices to their respective communities and organizations.
- Share success stories and lessons learned with economic development professionals from centers, organizations, colleges, and universities throughout North America.
- Gain the latest strategic insights on the ever-changing and vital roles of colleges and universities in local, regional, national, and international economic development.

The Summit takes place annually in October. Annual Summits have taken place in the following locations: 2016 Roanoke, VA; 2015 Anchorage, AK; 2014 Santa Fe, NM; 2013 Pittsburgh, PA; 2012 Chattanooga, TN; 2011 Indianapolis, IN; 2010 Reno, NV; 2009 San Antonio, TX; 2008 St. Petersburg, FL. More information about the current Annual Summit can be found at [www.UEDAAnnualSummit.org](http://www.UEDAAnnualSummit.org).

#### **Annual Summit Audience**

The UEDA Summit brings together national experts in leveraging university resources for greater economic development and community impact. These domain experts work within higher education, the private sector, economic development organizations, government agencies, and research centers. Attendees of the Annual Summit include:

- College and University Presidents
- Deans, Provosts, & Outreach Officers
- EDA Center Directors
- External & Government Affairs Administrators
- Innovation, Commercialization & Technology Transfer Directors

- Officials from Higher Education System Offices
- Economic Developers
- Economic Development Consultants
- Market Development Specialists
- Federal Agency Program Directors
- State and Federal Grant Administrators
- Manufacturing Extension Partnership Directors
- Workforce Development Directors
- Small Business Development Centers

The Annual Summit has seen great growth over recent years. The 2016 Summit had more than 200 participants and the 2017 is expecting more than 250 participants in Long Beach. The 2018-19 Summit has a goal of eclipsing 250 attendees, as well. Historically, 95% of Summit attendees are UEDA members. Registration rates for the 2013 Summit are currently set at 775 for members and \$875 for non-members, with early bird and group discounts available.

The Annual Summit is meant to provide financial support of the UEDA throughout the year by generating a net profit. UEDA staff and host work together to efficiently manage expenses and revenues for the Summit.

### **Annual Summit Organization**

Just as collaboration is a key component to UEDA’s core benefits, it is necessary within the organizational structure of Annual Summit planning.

UEDA is staffed year-round by an organizational management service provider (TrailBlaze Creative). The UEDA staff provides overall support and guidance of the organization, including, but not limited to, the Annual Summit. There is one part-time staff member who has direct Annual Summit responsibilities in the areas of sponsorship, marketing, communications, registration, agenda planning and budget coordination. There is also an additional dedicated part-time staff member who provides logistics planning, conference planning and overall support to the Annual Summit (event management sub-contractor).

The UEDA Annual Summit Planning Committee is an integral part of the Annual Summit. Comprised of members of the UEDA Board of Directors and volunteers throughout the organization’s membership, the planning committee meets via teleconference or web conference on a monthly basis, with additional support provided in the areas of sponsorship acquisition, agenda development, participant marketing and overall success of the conference.

The host university of the Annual Summit also serves on the planning committee to provide local guidance and support of the conference’s success. This request for proposals outlines the requirements for the host university in more detail, however, the main benefits to hosting the UEDA Annual Summit include:

- Showcasing host university’s economic development capabilities and success stories to UEDA members and media
- Highlighting and featuring host university leadership in the national spotlight and make presentations to Summit attendees
- Contributing an influx of tourism dollars to the host university local economy
- Recognition in media press releases, on regular and dedicated UEDA communications, and on the UEDA and Annual Summit websites
- Demonstrate dedication and support of university-related economic development practices

Ultimately, the Annual Summit planning committee is responsible to the UEDA board of directors.

### 1.3 Format of the Annual Summit

The Annual Summit has historically been a 4-day, 3-night conference (Sunday – Wednesday) that features coordinated programming in the form of general sessions, concurrent sessions, networking receptions, and break sessions. Staff will work with the selected host to ensure that the length of the conference is best serving member needs. The Summit also features an exhibit hall where sponsors and exhibitors staff tables, typically during morning and afternoon break sessions and receptions. The Summit also features an Awards of Excellence banquet, where top initiatives in university-related economic development are recognized. Since this conference represents a diverse, yet unified audience, specialty meetings are requested, at times, prior to or following the conference. These can include regional Economic Development Administration meetings, board meetings or partner organization member briefing sessions. Agendas for the 2016 Annual Summit can be found at [www.UEDAAnnualSummit.org](http://www.UEDAAnnualSummit.org).

## 2.0 Scope of Work

UEDA is seeking, as a result of the RFP, host universities, or regional teams/consortia, to serve as the host for the 2018 and 2019 UEDA Annual Summits. As a national organization UEDA strives to showcase the entire nation through its Annual Summit and other events. As such, the UEDA board encourages proposals from all regions of the United States. Ideally, UEDA would like to work with an organized regional group or consortia containing partner organizations in higher education, economic development organizations, local government, and the private sector.

The following sections highlight the responsibilities of the host university/consortia in relation to all aspects of the Annual Summit. While this outline is intended to serve as minimum requirements, UEDA is ultimately seeking host university/consortia partners for the 2018 and 2019 Annual Summits that will share in the ultimate success of the conference (two separate contracts / partnership agreements will be awarded).

### 2.1 Annual Summit Planning

The consortia will select a representative to serve as a Summit planning committee representative. This representative should be an individual whose core responsibilities at an institution of higher education include economic development. Other individuals from the consortia are encouraged to participate as members of the Summit Planning Committee.

Other responsibilities of the consortia include:

- Consortia representatives should participate in monthly Summit planning teleconferences/web conferences, beginning in June of the year prior to the hosting year.
- As the key member of the Summit planning committee, the consortia will drive the overall agenda for the Summit.
- The consortia is responsible for inviting the Economic Development Administration (EDA) Regional Director to attend and provide remarks to the membership.
- The consortia should invite the state's Governor/Lieutenant Governor to provide welcome remarks (in person or via video).
- A panel of University presidents should also be coordinated, in conjunction with the host university's president's office, to provide a national perspective of the role of universities in economic development, or other relevant topic determined by the Summit planning committee.

- The consortia should also provide leadership to attracting and retaining 5-7 keynote speakers for general Summit sessions.
- The consortia should also engage local and regional presenters (economic development organizations, government officials) to provide a panel presentation on the state of the regional economy.
- The consortia should also provide resources to include off-site social events, with consideration to the Summit schedule, for the conference. The consortia will assist in logistics coordination, including, but not limited to, transportation, programming, venue, food and beverages.
- The consortia may be required to provide a tour of proposed facilities to UEDA staff and personnel during a site visit prior to the conference.
- The consortia will assist UEDA in achieving its sponsorship goals.
- The consortia, in coordination with UEDA, will host a Rally prior to the Summit, to cull regional stakeholders for assistance in Summit success in the areas of sponsorship, attendance, agenda development, and UEDA membership development.

Potential UEDA Annual Summit host organizations should describe a program framework that affords a blend of experiences that allows participants to learn about the host community/region in addition to the national and international practices generally discussed at the UEDA Annual Summit.

## **2.2 Annual Summit Registration & Attendance**

The Consortia will provide leadership to ensure the strong involvement of the entire state/region of the location of the Summit. Outreach to local, regional and state representatives, organizations, chambers of commerce, business leaders, and other institutions of higher education should be a focus of the consortia. The consortia will work with UEDA staff to craft messaging targeted to attract these professionals to participate in the Summit.

The consortia will also provide volunteer staff at the event to assist with staffing the registration/information area at the Summit. It is anticipated that 2-3 volunteers will be needed to provide registration/information area staffing support throughout the entire conference. These volunteer positions can be facilitated in shifts and well-suited students can be used for this purpose. Responsibilities will include passing out name badges, distributing conference materials, ensuring payment has been received, providing conference directions, providing regional recommendations for meals and social activities, and answering general questions for Summit attendees.

## **2.3 Annual Summit Logistics**

The consortia should provide a number of logistical needs of the Annual Summit to ensure success. Ultimately, the Summit logistics must work within the UEDA Annual Summit budget plan. For logistics beyond the scope of the Summit budget, the consortia should present plans to underwrite such initiatives that will not compromise and will support the Summit budget. The consortia will be responsible for providing local vendor recommendations including catering, bartending, venues, printing, and transportation. UEDA believes in supporting the local economy, while maintaining competitive pricing options to keep registration rates reasonable for our attendees. All locations should be compliant with ADA guidelines.

The consortia may also recommend and supply other in-kind services towards the overall budget. These can include transportation, catering, information technology needs, audio/visual needs, conference

photography, printing, etc. These services will help support the overall UEDA budget, adding to the value and ultimate success of the event.

The consortia may also be asked to serve as the clearinghouse for conference materials. Assisting with accepting conference-related shipments prior to and following the conference are also the duties of the host university.

## 2.4 Annual Summit Sponsorship

With a profit-balanced conference budget in mind, the host university is asked to provide leadership in raising a total sponsorship amount of at least \$50,000. In 2016, the Annual Summit sponsorships exceeded \$100,000.

As previously mentioned, in-kind services should also be utilized to maximize the impact of the conference. All in-kind services will support the overall Summit operating budget, and thus, ensure the success of the conference. Proposed in-kind services should be direct line items in the budget and should not include staff time within the requirements outlined above.

## 2.5 Annual Summit Host City

The consortia should have the support of local/regional economic development and tourism professional organizations to support the Summit. Summit participants should have access to affordable lodging options connected to, or within walking distance to the conference area.

The conference area should provide adequate meeting accommodations that are reasonably affordable and offer acceptable viewing, listening, and accessibility that are comfortable for participants. General session areas should be able to accommodate a flexible audience size between 200-300 participants. There should be, at a minimum, three breakout session options that can accommodate an audience of at least 100 people.

**Flight transportation to the host city should be accessible by commercial flights. Fewer transfers from a hub city are preferred, but the host community must be accessible by commercial flights.**

UEDA desires to have regional flavor throughout the Summit. The host city should provide attraction to a national audience, based on general attributes or unique aspects relative to UEDA members. The host city should provide a natural draw to a national audience. Opportunities should be provided have participants to learn about the host city, in addition to the national and international practices generally discussed at the UEDA Annual Summit. Uncoordinated recreational opportunities should be available to participants choosing to arrive early, or staying after the conference.

## 3.0 Proposal Responses

All UEDA member universities, institutions of higher education, or consortia located within the United States and its territories are welcome to submit a proposal in response to this request. UEDA seeks a host university partner (or consortia), which can meet and exceed expectations as a host. UEDA has, in the past, had exceptional university partners and wishes to maintain a consistent level of collaboration, support, and

execution.

### 3.1 Crafting a Proposal

All proposals submitted must be in the format outlined below. Submissions should be no more than 15 letter-size pages, single-spaced in a readable 12-point font size. The required Summit Worksheet file (included as Excel supplement to this proposal) or a cover page will not be counted towards this limit. Appendixes are permissible and should not count towards this limit, but please include only necessary support information, or direct UEDA to online resources, where appropriate, to limit paper waste.

#### **Proposal Format**

Please use the format below to submit your proposal. At a minimum, please address the questions listed below and other items addressed in the Scope of Work within each section of your response.

Please note that UEDA is not asking for a detailed plan for the Summit. UEDA is looking for creative ideas on how the Summit can be executed in a sustainable and profitable way. Additionally, established relationships, or ideas for partnership are critical. For example, you should not confirm a networking event at the local aquarium as part of the proposal process. Rather, stating a university connection to the aquarium would suffice. UEDA is merely looking for a proposing university/consortia to paint a picture of what the Annual Summit experience would be like in your host city. In connecting with any members of a consortia, it is important to note that this is a proposal process and that all final agenda activities are subject to the approval of the Summit Planning Committee and the UEDA Board of Directors.

#### Introduction

Please give a brief overview of the consortia, the host university and your team. Are there any other organizations submitting as part of a consortia? Are you submitting a proposal for 2018, 2019, or either year?

#### Section 1: Annual Summit Planning

Who will be the host university/consortia representative? What is their role? What other individuals from your consortia/region will contribute to the success of the Summit? Is there a particular theme that you would like to advance as a framework for the Summit? What ideas do you have for the Summit agenda, in the form of speakers, sessions, etc.? What ideas do you have for a regional panel presentation? What ideas do you have for coordinated, off-site social events? Can you comply with the scope of work as presented?

#### Section 2: Annual Summit Registration & Attendance

How can the consortia play a role in attracting attendance and involvement across the entire host state? What organizations might participate? Describe your basic plan on providing staffing support for the registration/information area. Can you comply with the scope of work as presented?

#### Section 3: Annual Summit Logistics

Describe your contacts with local vendors. How would connections to these vendors be established? In what ways can UEDA support the local economy? What discounts/promotions may be available to UEDA? What in-kind services can be offered? Can you comply with the scope of work as presented?

#### Section 4: Annual Summit Sponsorship

Describe your approach towards acquiring Summit sponsorship. What commitments can the host university/consortia make towards sponsorship? What sponsorship can be committed by other regional



members? What sponsorship prospects would you approach? Can you comply with the scope of work as presented?

#### Section 5: Annual Summit Host City

Describe the lodging options available for conferences. Describe the meeting location(s) to supplement the Summit agenda. Describe airport transportation to your city, as well as transportation to the conference/hotel facility. Please share average rates from five major hubs. What makes the host region/city unique? What would attract a national audience to the city (be creative and innovative)? What uncoordinated activities are available to participants arriving before or staying after the conference? Describe the dinner options within walking distance, or a short transportation ride, from the meeting area. Can you comply with the scope of work presented?

#### Section 6: Summit Worksheet

Please follow the instructions on the Summit Worksheet Excel file. Please include the Excel file as part of your electronic submission. This is meant to provide the review committee a snapshot, only. It is not a commitment of budget support. It will be used to gauge support and cost environment surrounding the host city/region. UEDA recommends requesting the information on the Worksheet from your regional convention and visitor's bureau, as they often have this information easily accessible.

#### Conclusion

Please provide a 300-word summary of your proposal.

#### Appendix (optional)

Please provide any support materials to your proposal. Although not necessary, letters of support from regional organizations or other supporters of your proposal would be appropriate.

### **3.2 Submission Process**

UEDA requests three (3) hard copy and one (1) electronic copy of the proposal be submitted to be considered.

Hard copies should be mailed to:

University Economic Development Association  
Attn: Summit Hosting RFP  
PO Box 97930  
Pittsburgh, PA 15227

A PDF copy of the proposal (along with the Budget Matrix excel file) should be submitted to [info@universityeda.org](mailto:info@universityeda.org) with the subject "Summit Hosting RFP."

All proposals, hard copies and electronic copies, should be received no later than 5:00 PM EST, December 15, 2016.

### **3.3 Review Process & Criteria**

The following timeline will be utilized for the purposes of adequate review and approval of proposals:

December 15, 2016	RFP released
January 15, 2017	Questions due to UEDA
January 25, 2017	Responses distributed via UEDA Website
February 7, 2017	Proposals due to UEDA headquarters (by 5:00 PM EST)
February, 2017	UEDA review team to review proposals
March 2017	UEDA presents recommendations to UEDA board of directors for approval
March 30, 2017	UEDA notifies all applicants of proposal status

Questions about this RFP must be made in writing to UEDA via email at [info@universityeda.org](mailto:info@universityeda.org) by 5:00 PM EST January 25, 2017.

### **Proposal Evaluation and Scoring**

The sections listed above will be scored in the following fashion, with a total of 100 points awarded to evaluated proposals:

- Section 1 – 15 points
- Section 2 – 15 points
- Section 3 – 10 points
- Section 4 – 30 points
- Section 5 – 20 points
- Section 6 – 10 points

In an effort to ensure UEDA members have the opportunity to visit all parts of the country through attending UEDA Summits, bonus points will be awarded based on the location of the host city. Once proposals are scored, consideration will be given to the location of the host city and its radial distance from Summits spanning the previous 5 years. An additional bonus of up to 30 points will be objectively awarded by the UEDA review team.

The total maximum amount of points a proposal can receive is 130 points. All scoring from members of the review team will be averaged to determine an overall score of the proposal. This scoring system will be used as a guideline by the UEDA review team to make recommendations for both the 2018 and 2019 Annual Summit locations.

Any member of the UEDA review team, or board member, who is located within the host city will be excluded from discussions pertaining to the review and recommendation of selected proposals.

### **3.4 Other Considerations**

UEDA is not responsible for time reimbursement pertaining to the development of a proposal in response to this solicitation.

This request for proposals, responses to questions and any documentation relevant to this RFP will be located online at: <http://universityeda.org/events/annual-summit/request-for-proposals/>. Any responses to questions, as well as any amendments to this request for proposals will be posted to this section of the website. Additional notification will be added to the UEDA blog, which displays on the homepage of the

website. Respondents are responsible for checking this resource to ensure the most up-to-date information is included as part of their response.

UEDA reserves the right to negotiate with proposing organizations.