



Request for Proposals

2023 & 2024 Summits

Host University/Consortia Partner
Request for Proposals

UEDA ANNUAL SUMMITS

The UEDA Summit brings together experts in leveraging college and university resources for greater economic development and community impact. For more than a decade, content experts across the university-based economic development domain convene annually to share ideas and best practices in regional economic development. Those who attend the annual Summit:

- Examine the cutting-edge practices of colleagues as they compete for [Awards of Excellence](#)
- 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 September or October. Previous Summits have taken place in the following locations: 2021 Savannah, GA; 2020 Digital Summit; 2019 Reno, NV ; 2018 Milwaukee, WI; 2017 Long Beach, CA; 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 latest Summit can be found online at www.UEDAAnnualSummit.org.

About UEDA

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 serves its members by promoting knowledge and practice in the realms of talent, innovation, and place as drivers of regional prosperity.

Vision

UEDA, and its members, will be the leaders in advancing regional economic engagement fueled by higher education.

UEDA serves more than 1,000 professionals through our international membership of about 100 (and growing!) institutions and organizations. Our core membership comprises college and university professionals focused on economic development, entrepreneurship, innovation, talent development, and community engagement. Those we serve increasingly include higher education partners in private industry, entrepreneurship, local government, economic development organizations, federal agencies, workforce development, manufacturing, and financial institutions. These organizations and institutions are driving modern economic engagement and providing leadership to their regions and communities every day. In partnership with regional stakeholders, they are working to achieve shared economic and community impact goals. Each stakeholder group brings its own perspective and ideas to UEDA, and the resulting diversity of ideas is vital to our continued success. More information is available at www.universityeda.org.

UEDA Contact Information:

info@universityeda.org

Proposed Dates

The Summit is traditionally held in the months of September or October.

Target Audience

The UEDA Summit brings national experts in leveraging university resources for greater economic development and community impact together. 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 and Chancellors
- 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 Summit has seen great growth over recent years. The 2020 Digital Summit had nearly 300 attendees participating virtually. The 2021 Summit is expecting more than 200 attendees to gather in Savannah, GA. Historically, 95% of Summit attendees are UEDA members.

HOST UNIVERSITY/CONSORTIA REQUIREMENTS

UEDA is seeking, as a result of this RFP, host universities, or regional teams/consortia, to serve as the host for the 2023 and 2024 UEDA Summits. As an international organization, UEDA strives to showcase global best practices through its Summit and other events. As such, the UEDA board encourages proposals from all regions of North America. 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 main benefits to hosting the UEDA 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's 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

The following sections highlight the responsibilities of the host university/consortia in relation to all aspects of the Summit. While this outline is intended to serve as minimum requirements, UEDA is ultimately seeking host university/consortia partners for the 2023 and 2024 annual Summits that will share in the ultimate success of the conference (two separate contracts / partnership agreements will be awarded).

The local host/consortia is responsible for the following:

- Serving on and providing leadership to the Summit planning committee
- Recommending venues for events and lodging
- Identifying local speakers, university leaders, elected officials, and subject matter experts to participate
- Helping to staff the event, including but not limited to the registration table, session liaisons, ambassadors, activities leads etc.
- Provide local vendor recommendations including catering, bartending, venues, printing, and transportation.
- Fulfilling sponsorship requirement of \$70,000 (a model that has been working recently is that the host institution/consortia contributes the total sponsorship requirement up front, and then fundraises locally for reimbursement, using Summit sponsorship opportunities to provide value/deliverables)

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 for participants to learn about the host city, in addition to the national and international practices generally discussed at the UEDA Summit. Uncoordinated recreational opportunities should be available to participants choosing to arrive early, or staying after the conference.

Registration

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.

Logistical Requirements

The consortia should provide a number of logistical needs of the Summit to ensure success. Ultimately, the event logistics must work within the UEDA 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. Host duties also include assisting with conference-related shipments prior to and following the conference.

Annual Summit Leadership

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

For each Summit, a planning committee is convened to provide support in the areas of sponsorship acquisition, agenda development, participant marketing, and overall success of the conference. The host university of the Summit also serves on the planning committee to provide local guidance and support of the conference's success. This committee is 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.

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 Summit. There is one part-time staff member who has direct 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 Summit (event management sub-contractor).

Format of Summit

The 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. 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 past Annual Summits can be found at www.UEDAAnnualSummit.org.

The Summit also features:

- An exhibit hall where sponsors and exhibitors staff tables, typically during morning and afternoon break sessions and receptions.
- An Awards of Excellence banquet, where top initiatives in university-related economic development are recognized.
- Experiential activities that showcase the host city (tours, dinner at local restaurants, concurrent events to attend, etc)
- Daily receptions for guest to network and meet each other

FINANCIAL GUIDELINES

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 \$70,000 regionally. UEDA will work to attract sponsorship from national sponsors. In 2016, total Annual Summit sponsorships exceeded \$120,000.

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. Typical Summit registration fees are between \$600-700.

SUBMISSION INFORMATION

The following information outlines UEDA's submission process for proposals. Additional program specific information and details may be required as outlined in this Request for Proposals. Please visit our website for the most up to date information outlined below, <https://universityeda.org>.

Submission Process

UEDA requests three (3) hard copies 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 should be submitted to info@universityeda.org with the subject "Summit Hosting RFP."

All proposals, hard copies and electronic copies, should be received no later than September 30, 2021 at 5pm ET.

Submission Criteria & Format

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. 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.

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 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? Do you prefer hosting in 2023, 2024 or either year?

Section 1: 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: Summit Registration & Attendance

How can the consortia play a role in attracting attendance and involvement across the entire host region? 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: 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: 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: 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: Travel & Logistics

Please share with us a bit about what it is like to travel to the host city (near an airport hub? How many connecting flights?) and the typical flight costs for traveling to the city. Also, please share your thoughts on regional hotel properties and venues for the Summit. Ultimately, UEDA will develop an RFP to regional properties and will be responsible for selecting the final property, but we would like some direction on properties to consider. UEDA recommends requesting this information from your regional convention and visitor's bureau, as they often have this information easily accessible and may even write this section for you. (pro tip!)

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.

Selection process & Timeline:

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

~August 16, 2021	RFP released
August 31, 2021	Questions due to UEDA
September 2, 2021	Responses distributed via UEDA Website (if received)
September 30, 2021	Proposals due to UEDA headquarters (by 5:00 PM EST)
October 2021	UEDA review team to review proposals
October 2021	UEDA presents recommendations to UEDA board of directors for approval
October 2021	UEDA notifies all applicants of proposal status

Questions about this RFP must be made in writing to UEDA via email at info@universityeda.org by xxxxx

After Selection

Spring 2022	Site visit to selected partner region by UEDA staff
June 2022	Signed contracts with hotel and MOU with region
Fall 2022	2022 Summit: Location TBD
Spring 2023	Rally at partner region

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 the 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.

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.