



## REQUEST FOR PROPOSALS (RFP) FOR EVENT PLANNING SERVICES

The National American Indian Housing Council (NAIHC) requests a proposal from you/your organization to produce future events geared towards attracting visitors.

### WHO WE ARE

The National American Indian Housing Council (NAIHC) supports and serves tribal housing organizations and professionals throughout Indian country. NAIHC advocates for tribal self-determination and improving housing conditions in tribal communities by working with tribal housing departments and tribal housing authorities (TDHEs).

NAIHC's mission: *"To effectively and efficiently promote and support American Indians, Alaska Natives and Native Hawaiians in their self-determined goal to provide culturally relevant and quality affordable housing for native people."*

NAIHC achieves its mission through legislative advocacy, training and technical assistance, and membership support. As a nationally recognized nonprofit organization, NAIHC represents the sole, unified voice for tribal housing programs.

NAIHC consists of nine regions – covering thirty-five states. Whether it is advocating for increased funding or forming intertribal partnerships to build the tribal capacity to operate housing programs, NAIHC's membership is deeply rooted in the traditional native concepts of serving their people and communities in a culturally relevant way.

*To learn more about us, visit NAIHC at [www.naihc.net](http://www.naihc.net)*

HISTORY: Since 1974, NAIHC has built a strong presence in Washington DC; spearheaded enactment of the Native American Housing Assistance and Self-Determination Act (NAHASDA); established key policy positions that support housing programs and increases resources for its members; developed the most comprehensive and extensive training and technical assistance program for Indian housing in existence; and annually stages three events – including a national conference, a legislative conference and a legal symposium.

### DESCRIPTION OF EVENTS

*AMERIND | NAIHC Annual Convention & Tradeshow* – The Annual Convention features a tradeshow as well as topical training sessions that provide up-to-date information on issues that impact tribal housing programs and that directly relate to administration of programs under the Native American Housing Assistance and Self-Determination Act (NAHASDA). It provides an exciting opportunity to network with Tribal housing professionals, tribal leaders, administrators, and other tribal housing and community development stakeholders. Participants gain knowledge and new strategies about topics like workplace safety, claims, housing management, human resources, other various safety issues and much more!

Legal Symposium - NAIHC's Legal Symposium is the premier learning event for tribal housing and legal professionals from across the country working to address the availability and access to affordable housing for Native American families. Each year, the Legal Symposium brings together over 500 tribal housing professionals, tribal leaders, law firms serving Indian country, tribal administrative and compliance staff, federal officials from HUD, USDA, BIA, EPA or other agency programs, paralegals, occupancy specialists handling leases/evictions, risk management professionals, law school academics, legal scholars, in-house attorneys at housing authorities and Tribal legal department staff (among others). Together our attendees share their ideas, experiences and best practices, as well as address emerging issues.

Legislative Conference - NAIHC's Virtual Legislative Forum will offer updates and information of value to tribes, TDHEs, and Housing Authorities. This event brings together members of Congress, federal officials and tribal housing professionals to discuss important updates regarding legislative and policy issues affecting Indian Country.

Board Retreats as required. The NAIHC Board of Directors typically holds one strategic planning-type event that utilizes a hotel block and meeting space for 15-20 individuals

HUD ONAP Conferences – When assigned by HUD ONAP NAIHC plans and executes the following conferences in person or virtual:

- ONAP Housing Summit - HUD ONAP has a responsibility to the American Indian and Alaska Native housing communities to provide a forum for training and consultation. Under NAHASDA, grant recipients have a greater responsibility for developing, implementing and sustaining effective affordable housing programs. The ONAP Housing Summit provides an opportunity for large numbers of Native American housing providers to gather to discuss successes and concerns and develop strong, positive working relationships.

*The Summit offers:*

- Demonstrated applications of best practices, model approaches, and successful programs
- Innovative approaches to housing, community, and economic development
- Speakers and experts in housing and related areas.
- ONAP National Native Asset Building Summit – The National Native Asset Building Summit provides a forum:
  - To exchange ideas about asset building in Indian Country
  - To Identify key problem areas and barriers that prevent families from achieving self-sufficiency,
  - To highlight best practices in self-sufficiency and asset building,
  - To develop strategies and action items that will support Native residents as they move on their path toward self-sufficiency.
  - The Summit offers an opportunity for interaction among individuals representing a
- broad spectrum of entities such as national intermediaries, state funding agencies, lenders, federal agencies, financial regulatory, entrepreneurs, for-profits, tribes, and Tribally Designated Housing Entities (TDHEs).
- ONAP Crime Prevention Summit - The Summit offers a forum for tribal leaders and federal agencies to discuss methamphetamine prevalence, opioid addiction, violence against women, and gang violence. Discussion of these topics aids tribal leaders to come up with unified efforts

for their community to combat these crimes. Participants learn about how these topics affect housing and the greater tribal community. Information on available funding sources and ideas for implementing policies to prevent and address these crimes is shared. Tribal leaders, housing department executives, housing authority leaders, and interested tribal community members are encouraged to participate in this event.

**Due to HUD requirements and the irregular nature of HUD events, any performance of work related to HUD events must be tracked separately and should be considered as an additional opportunity to perform services in addition to the work carried out for NAIHC's annual event structure.**

## **PROJECT DELIVERABLES**

The selected individuals or firms will be expected to furnish all services necessary and appropriate to produce each of the event, including all the deliverables stated in Appendix A – Scope of Services.

## **DOCUMENTATION REQUESTED**

### **1. INDIVIDUAL/COMPANY BACKGROUND AND QUALIFICATIONS**

- a. Respondents are requested to provide an overview of your organizational chart, areas of specialization, number of years in operation, etc. Include an overview of similar services provided on a regional and local basis.
- b. Individuals are requested to provide an overview of educational background, specialized training, areas of specialization, years of experience. Note that a comprehensive resume will be acceptable documentation.
- c. Provide a minimum of 3 recent examples of successful large-scale events planned by you and/or your firm.
- d. Respondents should include any special circumstances or capabilities that you would like NAIHC to know about you, your company/team.
- e. Include a brief statement about any key relationships, business or personal, that you, your company/team has that they believe might bring value (sponsorships, media exposure, access or otherwise) to achieving the objectives of event.

### **2. PROPOSED FEES FOR YOUR SERVICES**

- a. Please include a budget that includes all anticipated costs and fees associated with planning and executing the events and Scope of Services outlined. Proposed budget may be scoped as a flat project-based fee or estimated hours. Please provide hourly rate for services. NAIHC will review either flat-rate proposals pursuant to a year-to-year agreement or hourly rate proposals.
- b. All actions and anticipated expenses shall be itemized with all hourly rates for services included.

## **INSTRUCTIONS FOR PROPOSALS**

Please provide a written response to each of the above requested documents including (i) full name of the company or individual respondent, (ii) names and titles of each principal of a company, (iii) contact information for each such person (address, phone, email), (iv) proposed project team who will manage and work on this assignment, and (v) licensures (if applicable).

NAIHC reserves the right to accept or reject any and/or all proposals, and to grant final acceptance to the proposal that best meets the needs and interests of NAIHC, as determined by NAIHC in its sole discretion. NAIHC will be the sole judge of whether a proposal meets the required criteria.

#### **DEADLINE**

Submissions are due by 5:00 PM Eastern time, August 20, 2021. shall be submitted via email to the attention of Bill Picotte, Deputy Director at [wpicotte@naihc.net](mailto:wpicotte@naihc.net).

#### **NEXT STEPS**

Responding companies or individuals must agree to keep their proposed project budget and the other terms of their engagement open for a period of at least 60 days past the submission deadline.

Once a company or individual is selected, NAIHC and the selected respondent or company will enter a written contract for the event. Each respondent shall assume all fees and costs (including but not limited to legal fees) incurred in responding to this RFP and negotiating a contract with NAIHC. NAIHC shall bear no liability to any respondent for any costs, fees or liability incurred in connection with this RFP or any response thereto.

#### **QUESTIONS**

Questions about this RFP should be directed by email to Bill Picotte, Deputy Director of NAIHC at [wpicotte@naihc.net](mailto:wpicotte@naihc.net). Please note that phone calls will not be accepted. All questions and NAIHC's answers will be made available to all potential RFP respondents, upon request.

#### **IMPORTANT**

The selected individual or organization will perform the duties requested as an independent contractor and not as an employee of NAIHC.

We look forward to working with the successful candidates to promote NAIHC and its mission.

## **APPENDIX A – SCOPE OF SERVICES**

#### **Timing/ Project Management**

- Primary contact for staff/planning team regarding the conference planning activities
- Work with NAIHC to develop timeline to include all critical tasks and deadlines and champions. The timeline (Production Schedule) will be distributed to all involved.
- Monitor and maintain the production schedule to ensure that all deadlines are being met, and that timelines are adhered to.
- Assist with finalizing agenda and flow of event.
- Assist NAIHC in development and management of event budget.
- Work with NAIHC to determine volunteer needs/assignments.

- Manage event timeline/ production schedule to ensure all parties remain on schedule with deliverables

### **Site Selection for all Annual Events**

- Work with staff & Board to determine desired location/venues for Legal Symposium and Legislative Conference
- Work with NAIHC & ONAP staff to determine desired location/venues for HUD ONAP Conferences
- Prepare or assist in preparation of board updates on events
- Work with both AMERIND and NAIHC to maintain short list of locations for Annual Convention
- Work with both NAIHC and ONAP to maintain short list of locations for conferences
- Prepare, submit and manage RFP process for joint Annual Convention 2024
- Prepare, submit and manage RFP process for ONAP Conferences
- Obtain contracts from venue, review, negotiate as needed.
- Submit contracts to AMERIND & NAIHC and continue negotiation process until ready for signature
- Finalize contract with venue (or work with 3<sup>rd</sup> party commissionable agent) and ensure that all deadlines and terms are met.

### **Facilities**

- Assign agenda items to contracted space based on times and needs.
- Meeting space management to include room assignment for agenda items, room set up and diagrams
- Set-up registration area
- Coordinate room turns with venue.
- Approve set up documents.
- Ensure that Fire Marshall Approval has been obtained.
- Work on any issues surrounding the approval of direct bill.
- Work with facility on electrical, internet and phone requirements.
- Outline any additional required services required by facility (security, first aid, etc.).
- Review site contract(s) and monitor deadlines and requirements
- Review and address concerns with site facility noted by NAIHC
- Set up of staff office and general coordination of deliveries
- Direct bill or Credit Card Authorization Set-up with facility, hotels and vendors
- Main point of contact with venue contact
- Additional Contracting processes as necessary for security, ground transportation, decorator, a/v company, etc. Process includes request for proposals, contract review and negotiations, and approval of contract by NAIHC

### **Lodging**

- Handle negotiations and contracting of host hotel and overflow hotels.
- Monitor hotel pick-up
- Manage room block by dropping rooms as necessary and communicating with hotel on issues.
- Arrange for additional rooms/space as needed.

- Handle staff/VIP rooming arrangements
- Submit staff and VIP rooming list to hotel; revise as necessary until arrival date.
- Work with hotel on contract attrition/penalties to minimize impact to NAIHC
- Report to NAIHC pre and post event on any potential attrition issues and impacts.

### **Food and Beverage Management**

- Work closely with NAIHC to design menus that fit the needs of the group.
- Develop menus and conduct meal coordination and negotiations
- Coordinate meal set-up & presentation & Table décor
- Make recommendations as to maximizing food budget dollars.
- Review and manage BEOs with the venue.
- Provide final meal guarantee counts to venue.

### **Audio Visual and Production**

- Create RFP and obtain proposals from A/V and companies.
- Secure audio visual and company based on proposals received.
- Manage A/V Company and act as point of contact.
- Obtain a/v needs from all parties (speakers, staff, competitions, General Assemblies, etc.).
- Work with staff/planning team to develop scripts and a/v presentation for major general assemblies
- Work with NAIHC on management of Speaker logistics (verify A/V needs and on-site support)
- Work with NAIHC on management of competition logistics (verify A/V needs and on-site support)
- Develop comprehensive audio-visual plan (production needs for high touch events, etc.)
- Create master spreadsheet of all a/v needs for event by room.
- Review needs/specs with A/V Company.
- Review and approve outline of equipment and costs.
- Hold pre-event meeting with a/v tech on site.
- Manage all a/v needs, changes, additions and costs on site.
- Manage all electrical needs for event
- Manage Internet needs for event and work with in house Internet provider

### **Marketing and Promotion**

- Work closely with NAIHC to develop materials for web, e-blasts and other marketing.
- Assist in concept and theme development
- Handle theme development – colors, venue recommendations, décor, costing
  - Engaging other organizations or individuals for specific graphic design elements or products is available.
- Work with the NAIHC staff to support their promotional campaign and drive attendee traffic to the event website
- Assist with/provide content for inclusion in email blasts inviting event registration- blasts to be sent to prior attendees as well as new contacts.

- Contract a show photographer as needed.
- Work to manage onsite organizational brand and signage.
- Assist with creation of sign list.
- Coordinate placement of proper signage around venue.
- Coordinate materials to be included in confirmation/on site packet for attendees, if applicable.
- Assist in sourcing vendors, selection of items and design for promotional or give-away items  
(NAIHC to purchase and manage order)

#### Legal Symposium and Legislative Conference (as needed)

- Lead staff/planning team in coordination of conference program materials
- Work with graphic designer on design and layout of event programs
- Manage printing of programs

#### Annual Convention

- Work with both staff planning teams to coordinate conference program materials
- RFPs for both graphic designer and printer
- Work with graphic designer on design and layout of event programs
- Manage printing of programs
- Work with NAIHC and AMERIND staff to ensure purchasing remains on budget and meets NAIHC needs

#### HUD ONAP Conference

- Work with NAIHC staff to coordinate conference program materials
- RFPs for both graphic designer and printer
- Work with graphic designer on design and layout of event programs
- Manage printing of programs
- Work with NAIHC staff to ensure purchasing remains on budget and meets NAIHC needs

#### Event Evaluation

- Develop overall event evaluation tools
- Determine how evaluation tool will be administered (hard copy, online)
- Work with staff to manage printing of any hard copy evaluation forms
- Work with staff to develop any online tools to be linked to website
- Complete an Analysis of evaluation and submit report

#### **Sponsors/Supporters/Donors - AMERIND | NAIHC Annual Convention & Tradeshow, Legal Symposium & Legislative Conference**

- Work to develop and nurture relationships with possible sponsors.
- Work with staff/planning team to manage conference sponsorship onsite benefits fulfillment.
- Act as main point of contact for confirmed sponsors prior to event to manage logistics
- Act as additional sponsor contact at the event.
- Work with team to create and deliver sponsor “touch points” to ensure positive experience.
- Assist in the development of sponsorship packages and promote sponsorship opportunities in all marketing collateral.
- Work with companies to solicit both cash and in-kind sponsorships.

### **Speaker Management & Support**

- Review schedule of sessions created by staff.
- Manage session schedule with room inventory and space requirements
- Compile info about a/v requirements of each speaker.
- Ensure that special room set requirements and a/v needs are filled.
- Contact all confirmed speakers to obtain AV needs.
- Act as point of contact for speaker questions.
- Manage a/v vendor onsite to ensure seamless technology needs for speakers.

### **On-Site Coordination**

- Serve as primary on-site management during the event.
- Event Planner to be present on site (includes set up and travel days).
- Set-up and manage pre-conference meeting with venue and suppliers including review of function sheets, last minute changes, requests and questions, and introduction of all key suppliers to team.
- Responsible for overseeing convention set-up (registration area, tradeshow, General Assembly stage set) and placement of all conference signage.
- Serve as main point of contact for suppliers and venue during the event.
- Check all set ups to ensure accuracy and timeliness.
- Conduct on-site logistical coordination of a/v and meeting space sets.
- Verify timely arrival of meals.
- Review and sign off on catering bills.
- Manage outside vendor performance.
- Work with sponsor to ensure satisfaction.
- Coordinate all special events.
- Work jointly with staff to ensure successful event.
- Problem solve as issues arise.

### **Ongoing Communication**

- Regular meetings with staff to ensure that tasks are on schedule and to discuss and assist with challenges/concerns.
- Attend any local planning meetings in person or by phone.
- Provide written updates on planning progress as requested.
- Provide regular budget updates and numbers.
- Work with staff/planning team to manage local relationships (Conference and Visitors Bureau, other vendors or sites)

### **Reporting**

- Conduct post-event debrief meeting with client.
- Receive and reconcile all final bills from venues, vendors, etc. and forward (originals) for payment.
- Assist in the collection of commissions (if applicable) from hotels after event bills are paid.

## **Additional Services for Specific Events -**

### **Board Retreat site/logistics**

- Contact sites for proposals and make recommendation re: site
- Contract negotiation
- Event logistics: room set, a/v order, food & beverage order

### **Annual Report Project Management**

- Create timeline for project with all deadlines
- Create content tracking sheet and assign staff roles
- RFP for graphic design and printer
- Work with graphic designer on design and layout of event programs
- Manage printing of programs

### **Registration Services (AMERIND | NAIHC Annual Convention & Tradeshow, Legal Symposium, Legislative Conference & HUD ONAP Conferences)**

- Create process for handling of phone inquiries and registrations pre-event.
- Set up on line registration system (recommended).
- Create hard copy registration form for mail/fax use.
- Help to identify a main point of contact for all phone, fax and online registrations.
- Create badge looks for approval one month in advance of event.
- Work with staff/planning team to help create name badges for all pre-registered attendees.
- Set up registration area at venue, including alphabetizing name badges and putting them in holders for easy access by registration team/volunteers.
- Generate alphabetical list of participants, and other reporting for on-site use.
- Ensure that staff has access to registration data in order to communicate with participants.
- Assist staff with developing system for management of on-site registration. Staff/or contracted party will be responsible for collection of on-site registration fees (*if any additional temp staff may be required- fees would be the responsibility of NAIHC*).
- Work with staff to create a cash/credit card handling procedures for on-site registrations.
- Provide schedule for registration staffing needs and associated costs as least two weeks prior to the conference.

### **Exhibitor/Tradeshow Management (Legal Symposium & Annual Convention)**

- Contract with general service contractor/decorator.
- Manage all trade show set up with facility
- Develop exhibit floor plan and exhibitor materials.
- Create a master list of potential sponsors and exhibitors to include expanded markets.
- Recruit and coordinate organizations and companies for the exhibit area.
- Work with exhibitors and decorator during set up and show floor hours to ensure satisfaction and to troubleshoot any issues.
- Ensure that marketing materials, email blasts and advertising target an expanded list of potential exhibitors.
- Prepare security schedules and hire guards

## **Deliverables**

- Attend regularly scheduled meetings with staff
- Scheduled update reports to NAIHC Executive Director
- NAIHC event production schedules for future planning
- Maintain working Draft Agenda documents (for planning and web)
- Create event budget tracking sheets (based on existing event budget figures)
- Final reports on hotel performance
- Master room set documents (room sets, a/v, electrical and internet)
- Additional vendors contracted and managed (transportation, electricity, Internet, security, etc.)
- Contract with audio visual vendors (negotiated and managed)
- Master a/v documents (rooms with all a/v outlined)
- Food and Beverage master documents (cost tracker)
- Final reports on food and beverage performance
- Master signage document and manage signs on-site
- Assist team in developing registration process
- Conference evaluation tool developed
- Summary report of conference evaluations
- Overall On-site management of all conference logistics
- Final reports covering all aspects of event
- Final invoices submitted for payment (reviewed, corrections made)