



**National Association for Welfare Research and Statistics (NAWRS)  
2023 and 2025 Conference Planning Supportive Services  
Request for Proposals  
AMENDED 5/24/22**

**Amendments made 5/24/22: Task number 6 is now optional  
Proposal deadline extended to June 10, 2022, 5 PM ET**

**PURPOSE**

This Request for Proposal (RFP) is soliciting written proposals from professionally qualified consultants to provide technical expertise and conference planning supportive services to the Board of the National Association for Welfare Research and Statistics (NAWRS) whose organizational goals are to gather, analyze, and disseminate various research and practice-based evidence in the field of public human services.

Generally, the tasks that will be awarded from this solicitation will include supporting the NAWRS Board in developing and executing a biennial conference showcasing state and federal research in enhancing family self-sufficiency and increasing economic mobility, providing technical expertise and engaging stakeholders and experts on research topics of interest to the field, facilitating meetings and small conferences of key stakeholders and experts, and supporting the development and dissemination of evaluation, research, and technical assistance materials.

All proposals should clearly define how prospective partners will work with the NAWRS Board of Directors, leadership/staff and key stakeholders including volunteer committee members to facilitate the planning and execution of the 2023 and the 2025 NAWRS conferences. The proposal shall include both an initial work plan and associated budget. Offerors must respond to the required tasks and are also invited to bid on optional tasks.

Release Date: Monday, May 2, 2022

Questions welcome through Monday, May 11, 2022

**Closing Date: Friday, June 10, 2022, 5PM ET**

Submission Instructions:

- Email proposals to **NAWRWorkshop@gmail.com**  
Kate Probert, President
- **Subject Line:** NAWRS Conference Proposal
- Additional detail on pg. 9

***Proposals submitted after Friday June 10, 2022, at 5PM ET will not be considered.***

**Note to offerors:** The NAWRS board is not providing budget parameters for this RFP. We are using this exercise as a step in understanding the current market for these tasks and we will be examining bids from that perspective. We understand that COVID-19 has changed practices and pricing for products, labor and other services, and inflation has impacted all business and services. We look forward to interviewing each of our bidders to gain additional context to their services and pricing before making our final contract award. We may also choose multiple contractors for different pieces of the tasks we are seeking assistance with.

## **BACKGROUND AND TASKS**

### **Background**

The National Association for Welfare Research and Statistics (NAWRS) is a non-profit association whose purpose is to promote the exchange of ideas on how research and statistical analysis can contribute to the development and administration of effective human services programs.

Since the 1950s, NAWRS has hosted an annual or biennial gathering of researchers and practitioners nationwide who think about data-informed approaches to improving human services programs. State and local level program administrators and evaluators drive the work in close partnership with researchers and policy makers.

NAWRS supports the dissemination of research and evaluations primarily in the areas of poverty, economic self-sufficiency, home visiting, fatherhood, and other programs that support child and family well-being. The membership of NAWRS includes representatives from federal, state, and local government as well as universities and for-profit and nonprofit organizations.

The organization is governed by a volunteer Board of Directors. The majority of the board members are employees of state and local government agencies and include members from research firms, universities and for profit/nonprofit organizations that serve in different capacities on the board according to the board's bylaws.

### **About the NAWRS Conference**

The biennial NAWRS conference promotes the exchange of ideas on the collection, analysis, presentation, and application of data in the field of human services. Conference participants include other federal, state, and local policymakers, program administrators, legislators, researchers, and advocacy group members. The NAWRS board also hosts board meetings before and after the conference. The conference provides a forum to:

- learn about the experiences of other agencies that have implemented and evaluated human services programs;
- exchange ideas on the collection, analysis, presentation, and application of data;
- gain knowledge about state-of-the-art research methodologies and technologies;
- confer with nationally known researchers from both the university and private sectors; establish and renew professional relationships;
- bring national exposure and recognition of a state's human services programs and accomplishments in the areas of research and evaluation; and
- keep abreast of the latest social and economic issues and policies affecting human services programs.

To support the NAWRS board in this effort, NAWRS seeks a contractor with a proven record of success in planning and executing large scale conference efforts of comparable size and scope (200-300 participants), setting up smaller meetings and engaging the involvement of a range of experts. The Contractor must demonstrate an ability to accomplish the tasks listed below expeditiously and efficiently working with large numbers of participants from a variety of organizations with courtesy and professionalism, and creatively and effectively addressing problems as they arise. The first conference supported by this contract will be held in late summer or early fall of 2023. The second conference will be held in late summer or early fall of 2025.

## **STATEMENT OF WORK**

The Contractor shall furnish the necessary qualified personnel, equipment, materials, supplies, services, facilities, and otherwise do all that is necessary for, or incidental to, the performance of the work set forth below. Contractors may propose alternative approaches in addition to addressing the tasks as proposed by NAWRS; justification for alternatives (e.g., cost efficiency, etc.) must be provided with any alternatives proposed. Contractors are expected to draw on their own expertise to propose the most effective approach to addressing the tasks. Once the contract is awarded, the Contractor is expected to work with the NAWRS board or its appointed designee to refine the activities and proposed plans.

## **SERVICE COMPONENTS**

### **Required Task 1: Communication and Project Management**

The purpose of this task is to provide technical expertise and support services to successfully prepare for and execute the biennial NAWRS conference. The Contractor will not successfully meet the requirements of this services component until the conference is successfully executed and the final summary report, which documents the outcomes of the conference and the activities of the planning years, is delivered to the NAWRS board President and Vice President.

Within ten (10) business days of the beginning of each contract year, the Contractor shall initiate communication with the NAWRS board President and Vice President to schedule a discussion of a range of topics, including, but not limited to, clarification of NAWRS board interests and objectives for the conference, conducting work on an efficient schedule and budget, reaching agreement on outstanding issues, clarifying timelines and work schedules, and identifying staff who will take lead responsibility for various activities and tasks.

The Contractor shall send an agenda and any relevant materials to the NAWRS board President or designee no less than three (3) business days prior to the discussion. Within five (5) business days of the discussion date, the Contractor shall submit to the NAWRS board President or designee a memorandum summarizing major decisions reached and follow-up issues identified during this discussion. Ongoing communication is also necessary to ensure successful completion of this services component, and should be both verbal (e.g., regularly scheduled conference calls) and written (e.g., monthly progress reports). The Contractor shall propose a schedule for regular telephone communications to update the NAWRS board on progress and challenges. The contractor shall propose a schedule for the regularity of these calls, but the NAWRS board anticipates call frequency will depend on the project's activities (i.e., more frequent in the months preceding the conference). The schedule for telephone discussions may change as agreed upon by the NAWRS board President.

In addition to the ongoing conference calls, the Contractor shall submit billing and written monthly progress reports throughout the contract period, which includes the following information: activities completed and progress on each task for the report month, including expenditure data by task, monthly and cumulative expenditures, and the balance remaining. The Contractor reports shall include details related to project performance. The Contractor shall submit billing and monthly reports to the NAWRS board President no later than the 15th day each month for activities in the previous month (e.g., April 15<sup>th</sup> for the month of March).

### **Required Task 2: Revised Work Plan**

At a mutually agreed upon date, the Contractor shall submit a revised work plan that reflects more detailed information and understanding of the activities required to meet the goals and objectives of the NAWRS conference and conduct the tasks reflected in the Contractor's proposal. The plan shall indicate timelines for major activities including, but not limited to, securing a hotel vendor, securing a venue for a networking event close to the hotel venue, developing the conference website, releasing the call for proposals, managing all aspects of the registration process, create on-site check-in system, create participant badges, develop the conference mobile app, compiling information for the program book, ad hoc updates to the conference website, and other deliverables, as well as identifying staff members who have major responsibility for tasks or activities. This revised work plan shall include a timeline for the conference preparation that includes all salient activities and a target completion date. The contractor shall work with the NAWRS board to update the work plan whenever major changes occur. Throughout the contract period, the Contractor shall notify the NAWRS board President or designee within 24 hours of any issues that arise that could delay the scheduled completion of the work/activities beyond the dates included in the approved work plan. The Contractor shall propose corrective actions to address the problem and restore the schedule to the extent possible.

### **Required Task 3: Conference Site and Hotel Accommodations Selection and Management**

Selection: Upon the beginning of the period of performance of Task 3, the Contractor shall work with the NAWRS board to begin the process to identify for the consideration and approval, potential sites for the next conference. The Contractor shall contact hotels, conduct research, and present to the NAWRS board a memorandum that includes a list of hotels in the areas identified and their availability to host the conference. The Contractor shall submit a recommendation memo to NAWRS board President outlining the advantages and disadvantages of identified hotels, including, but not limited to available dates, sleeping room rates, meeting room rental costs, sizes of available rooms, technology costs, any other spending requirements, and other relevant details. The Contractor shall submit the memo within two (2) months of the beginning of the contract award. Typically, the conference is held in August or September during odd years. Based on the needs of NAWRS, and the Contractor's recommendations, the NAWRS board President will direct the Contractor to negotiate for and secure hotel and meeting room accommodations for participants and attendees at the lowest obtainable rates with the agreed upon site/hotel, which include government discounted rates. The Contractor shall negotiate on the behalf of NAWRS for the best obtainable package of benefits, such as free or reduced meeting space, complimentary rooms and parking passes, free internet, and airport transportation, where feasible. The Contractor shall secure the hotel contract no later than three (3) months after the beginning of the contract period.

Management: Upon selection of the conference site, the Contractor will work on behalf of NAWRS to be the main point of contact and coordinator of the preparation for and execution of onsite tasks such as ensuring technology is set up (either purchased through the venue or a subcontractor), WiFi access is enabled, plenary and concurrent session rooms are set up as requested, sessions are monitored by NAWRS board and/or committee members, meal service is scheduled etc. The Contractor will work alongside the NAWRS board and committee members in executing this management function by negotiating and assigning tasks to board and committee members before the conference begins and ensuring each function is supported and carried out.

#### **Required Task 4: Conference Registration and Supported Invitee and Speaker Registration and Travel**

The Contractor shall provide a platform for conference registration. This includes registration for general participants, speakers, and other special invitees. This may or may not be the same platform used for proposal submission and review (see Task 6). The Contractor shall identify for the NAWRS board consideration and approval potential options for a registration platform. The Contractor shall contact vendors, conduct research, and present to the NAWRS board a memorandum that includes a list of proposed options. Within two (2) months of the beginning of the contract, the Contractor shall submit a recommendation memo to the NAWRS board regarding the advantages and disadvantages of the proposed options. Based on the needs of NAWRS and the contractor's recommendations, the NAWRS President and conference committee will direct the Contractor to negotiate for and finalize plans to develop a registration platform no later than five (5) months after the beginning of the contract.

The Contractor shall, in consultation with the NAWRS President, propose a process for sending speaker invitations (both supported and not supported) and invitations to other designated invitees. This should include coordination of speaker invitations, notification of proposal acceptances and rejections, and travel arrangements. Supported invitees and speakers are individuals for which NAWRS expects to pay for some travel, lodging, and per diem. The contractor shall use materials developed for prior conferences as resource materials and develop appropriate materials for the upcoming NAWRS conference including invitations, other logistical information needed, and other documents recommended by the Contractor and approved by the NAWRS President or designee. All materials must be written in clear, concise language and provide complete information to interested parties. Email and other electronic means will be the preferred method of distributing invitations, receiving registrations, and communicating with potential attendees.

The Contractor shall be responsible for accepting, processing, and tracking all conference registration requests for all attendees, and making travel arrangements for the supported invitees and supported speakers. The Contractor shall be responsible for tracking registration (for speakers, other designated invitees, and general participants) on a timely basis based on rolling information from NAWRS. Working with the NAWRS President and Conference Committee, the Contractor shall initiate a plan to follow up with supported invitees and speakers to confirm their attendance and make travel and hotel accommodations, if requested and approved by the NAWRS President or designee. For speakers, the Contractor shall also identify the audio/visual and other needs of each speaker and make appropriate arrangements for such equipment to be available at the appropriate time and space for the speaker at the conference. If any individual identified as a speaker indicates that they will not be able to attend the conference or has questions about their status as speaker, the Contractor shall notify the conference committee within one (1) business day by phone or email. The Contractor shall identify the most

economical airfares for attendees whose expenses are paid under this contract (supported invitees and speakers). Regarding supported participants, the Contractor shall exercise reasonable judgment in accommodating travel and lodging needs but shall obtain prior written approval from NAWRS in unusual, unique, or sensitive situations. The NAWRS board will discuss these situations as an agenda item in Task 1 and as they arise during registration.

The Contractor shall provide clear and complete instructions for all attendees to make reservations for accommodations at the conference hotel. If attendees will be responsible for making such reservations directly, the Contractor shall make staff available to provide general information and registration instructions.

Beginning two (2) weeks after the conference invitations are sent to supported invitees and speakers, the Contractor shall provide the NAWRS President and conference committee with an electronic mechanism for a weekly, or more frequent, status update of the names, numbers and fees (dollars paid or due) of registrants, including supported invitees and NAWRS conference sponsors who have registered. This update will include warnings when the number of registrants approaches the capacity of the hotel to provide sleeping rooms or the fire code occupancy limitations for the meeting space. The status update reports shall include a clear and separate listing of those invited to be speakers, indicating who has and has not been contacted by Contractor staff and what the response has been. (In some instances, NAWRS board designees will take responsibility for contacting speakers and will maintain such a list of who has been contacted and confirmed themselves.) NAWRS prefers that the Contractor use an online registration application that allows the NAWRS President and conference committee members to electronically check registration numbers on a real-time basis. The Contractor shall also provide information on travel costs as part of these updates. At intervals agreed-upon with the NAWRS President and conference committee and consistent with the email blast calendar developed in Task 5, the Contractor will send registration reminders via email to supported invitees, speakers, and general participants, and conduct appropriate follow up with supported invitees and speakers. In addition, the Contractor is responsible for reconciling registration revenues with actual registration and resolving any issues.

#### **Optional Task 5: Manage Email Subscriber List and Email Blasts**

Integrated email and social media communication are essential to conference success. To disseminate conference news and updates, NAWRS maintains accounts on social media platforms that reach previous and prospective conference participants. The Contractor shall be responsible for drafting social media content for these platforms and managing all mass email communications about the conference. Mass email communications, including the “save-the-date” for the conference, a call for research papers/sessions, proposals, and related reminders, an announcement of the opening of online registration and subsequent reminders of conference deadlines. The Contractor shall manage conference emails using an email marketing service to be proposed by the Contractor and approved by the NAWRS board.

Within two (2) months of the beginning of each contract period, the Contractor shall submit to the NAWRS board President a communications plan including: a proposed email marketing service provider and its capabilities; a calendar for developing and sending all email communications before, during, and after the conference; a plan for split testing email send times, subject lines, and other elements to continually improve performance; a plan for regularly updating the NAWRS subscriber list; and a table

shell for email performance reports to be provided to the NAWRS board President following each email distribution. The Contractor shall submit a revised email communications plan no more than two (2) weeks after receipt of NAWRS board comments. When available, the NAWRS board President will share information from a prior conference or guiding language.

Upon contract award, the NAWRS President or designee will send the Contractor a list of social media accounts for which the Contractor shall develop content. Draft social media content should relate to email blasts and tailored to each platform. No later than eight (8) weeks before the conference date, the Contractor shall submit draft social media content to be posted during and after the conference and a timeline for posting the content. Upon award, the NAWRS President or designee will send the Contractor a list of social media accounts for which the Contractor shall develop content. Draft social media content should be tailored to each platform.

#### **Optional Task 6: Automate and Facilitate the Call for Proposals and Proposal Review Process**

NAWRS seeks strategies and tools to automate the Call for Proposals and Proposal Review Process and is looking for strategies to streamline these activities through platforms such as Cvent. Offerors are invited to provide strategies and pricing for this Task that includes working with the NAWRS board to align the Call for Proposals that the NAWRS board will develop. We are interested in a tool that can manage the full process, from collecting submissions to publishing final proposal selections into an agenda; electronic collection and “storage” of the proposals; emails with targeted invitations, confirmations, reminders, and alerts, as well as the ability to amend the proposal once submitted.

As directed by the NAWRS board, the Contractor will utilize the NAWRS call for proposals that will provide straightforward information about the agreed upon theme, session tracks, session structure (time and format options), and required basic presentation information, to support discussion-based formats, directions for emerging scholars’ poster sessions or papers, and all evaluation criteria for session selection. At the end of the call for proposal submission timeframe, we require a compiled a list of all submissions from the platform database supplied to the NAWRS board.

The offeror will provide the NAWRS board with reviewer links and passwords for all reviewers assigned. Simultaneously, the Contractor will provide training and technical assistance (TA) to proposal reviewers to show them how to access and use the electronic event platform, where they will do their scoring electronically. In addition to ensuring that all reviewers understand how to do their work in the online system, reviewer training will explain scoring criteria, review scoring assignments, and reinforce scoring deadlines.

#### **Optional Task 7: Develop and Maintain Conference Mobile App**

NAWRS is interested in reducing overall conference costs through innovative, cost-effective platforms such as a conference mobile app. The Contractor shall identify, for NAWRS board consideration and approval, potential options for purchasing and customizing the conference mobile application that can house the hotel map, conference schedule, speaker bios, and session evaluations. The Contractor shall contact vendors, conduct research, and present to the Board a memorandum that includes a list of at least three proposed options for the conference mobile app. The Contractor shall include their recommendations and substantiation for those recommendations.

#### **Optional Task 8: Develop Conference Materials**

The Contractor shall be responsible for developing and distributing a range of materials for the conference described below. The Contractor shall include the timeline for developing conference materials in the revised work plan developed under Task 2.

**Conference Signage.** The Contractor shall be responsible for designing and producing all signage for the conference. This includes but is not limited to: signage directing participants to the conference, registration table, plenary and breakout rooms, a conference poster, and conference handouts. The Contractor shall provide draft signage to the NAWRS board for review no later than five (5) months before the conference. The Contractor will revise and submit final signage within two (2) weeks of receipt of NAWRS board comments.

**Electronic Conference Program.** The Contractor shall be responsible for designing and producing an electronic program that will be used to populate the conference mobile app and website, including the design of an electronic conference program cover by a graphic designer. Prior to developing any design options, the Contractor shall discuss preferences and options with the NAWRS board. After this discussion, the Contractor shall submit five (5) draft electronic conference program cover design options for the NAWRS board to consider. The number of program books to be printed will be minimal (approximately 25) determined in consultation with the NAWRS board. The electronic conference program will include the following types of information: information about NAWRS, conference agenda, descriptions of sessions, and any other salient information. The Contractor shall work with the NAWRS board to develop a timeframe for electronic program completion. The Contractor shall propose a draft timeline for the electronic program (including the development of a proposed style guide) to the NAWRS board no later than seven (7) months before the conference. The Contractor shall submit the final workplan timeline for development of the program book (including the style guide) within one (1) week of receipt of NAWRS board comments. For the purposes of developing the program book timeline, the Contractor shall anticipate receiving draft program content from NAWRS typically four weeks before the conference. The Contractor shall expect two rounds of revisions before the electronic program book is considered final, and these revisions should be accounted for in the workplan timeline for the electronic program book.

As part of the program development process, the Contractor shall also develop an abbreviated agenda-at-a-glance that will be uploaded to the NAWRS conference website approximately 90 days prior to the conference start date.

**Presentation Handouts.** NAWRS does not reproduce materials provided by speakers to be used in the conference sessions (e.g., copies of PowerPoint slides, handouts, summaries). The Contractor shall propose methods for sharing materials provided by speakers through other cost-effective, digital alternatives. The Contractor shall be responsible for negotiating with speakers' appropriate methods to obtain materials in advance of the conference date.

**Conference Evaluations.** At least eight (8) months prior to the conference, the Contractor shall propose cost-effective, user-friendly methods for conducting the conference evaluation survey for both on-site and live stream participants. The NAWRS board will make the final decision on which method shall be used. The Contractor is encouraged to consider free or low-cost options. No later than six (6) months before the conference, the Contractor will send draft conference evaluations to the NAWRS board President. The Contractor shall make any revisions per comments from the NAWRS board and submit the final conference evaluations for final approval within two (2) weeks of receipt of those comments.

**Additional Materials.** The Contractor shall be responsible for designing and producing a number of other ad hoc materials for the conference that may include, but are not limited to conference bags, abbreviated agenda-at-a-glance, moderator packets, name badges, and table tents for speakers. The Contractor shall provide a draft of each requested material to the NAWRS board according to a workplan timeline determined in consultation with the NAWRS board President. Any revisions to the materials shall be made within one (1) week of receipt of comments from the NAWRS board.

### **Required Task 9: Final Summary Report and Conference Debrief**

In consultation with the NAWRS board President, the Contractor shall be responsible for scheduling and facilitating a comprehensive debrief of the NAWRS conference activities, as well as coordinate all post-conference activities. Prior to the debrief, the Contractor shall develop and provide a conference final summary report to the NAWRS board. This report shall include pertinent information on the attendance and participation in the conference, as well as feedback from the conference evaluation surveys. The report may include, but is not limited to, the following types of information: total number of pre-registrants, total number of onsite registrants, total number of no-shows, attendance at each session, number of independent live stream connections, location and professional affiliation of attendees, results from the conference evaluation surveys, and the reconciled totals of fees and costs for all participants broken down by affiliation type (e.g. federal government, state government, academic, etc.), and registration type (full workshop- early bird, full workshop regular, single day-early bird, sponsor, etc.). The report will also discuss any problems encountered and suggest ways to mitigate or resolve them for future NAWRS conferences. This report shall be due to the NAWRS board President no later than six (6) weeks after the conference end date or at least one (1) week prior to the debrief meeting, whichever is sooner. The final version of the final summary report is due no later than two (2) weeks after receipt of NAWRS board comments.

### **Privacy and Data Security Activities and Monitoring**

NAWRS is committed to ensuring that any sensitive data collected as part of this contract are maintained and stored securely in a manner consistent with applicable laws and regulations. As such, the Contractor shall undertake activities to maintain the confidentiality, integrity, and availability of data gathered under this contract. In addition to electronic data security requirements, the Contractor must have a plan for the protection of any paper records or other documents that contain sensitive or personally identifiable information (PII). Specifically, as appropriate, the Contractor shall follow the policies, procedures, controls, and standards required by the HHS Information Security Program to ensure the confidentiality, integrity, and availability of sensitive information for which the Contractor is responsible under this contract or to which the Contractor may otherwise have access under this contract.

### **DELIVERABLES**

All deliverables will be reviewed and accepted by the NAWRS President and/or conference committee and will become the property of NAWRS.

### **TIMELINE AND KEY DATES**

The following schedule provides key target dates for the selection process and services to be performed during the conference planning process:

<b>Activity/Deliverable</b>	<b>Date</b>
RFP Questions/Inquiries	Welcome through May 11, 2022
<b>Deadline for Proposals</b>	<b>Friday June 10, 2022, at 5PM ET</b>
Selection and notification	No later than Friday, June 24, 2022
Regularly Scheduled NAWRS Board Meeting	Wednesday, July 13 <sup>th</sup> , 2022, 2PM – 4PM ET
Conference Kick-Off Meeting	Wednesday, July 20 <sup>th</sup> , 2022
Conference	July or Aug, 2023
Conference Debrief	September 2023

**PROPOSAL SUBMISSION INSTRUCTIONS**

In responding to this RFP, please use the following format. Response to the RFP should be no more than 10 pages in length, 12-point Times New Roman font, excluding attachments.

Proposal shall include:

- General description of planning activities recommended
- Work Plan
- Key Deliverables
- Proposed Timeline
- Bios of team members
- Budget Workbook
  - NAWRS requests separate budgets for 2023 and 2025 (Two Workbooks)
- 2-3 references
- Client list
- 2 sample work products