



AFP/DC and DMAW Annual Bridge Conference REQUEST FOR PROPOSALS

Information about AFP/DC and DMAW and the Bridge Conference

The Association of Fundraising Professionals/DC Chapter and Direct Marketing Association of Washington co-hosted the first ever Bridge to Integrated Marketing and Fundraising Conference in Washington, D.C. at the Marriott Wardman Park hotel on July 12-14, 2006. These organizations are now jointly seeking proposals from meeting planners, association management companies, special event organizers and others who qualify to provide volunteer coordination, conference and meeting management services for the second Bridge Conference.

AFP/DC is a 501(c)(3) regional professional association founded in 1965, with approximately 1,000 members in the Greater Washington Metropolitan area. The chapter's web site is www.afpdc.org. AFP, an association of professionals throughout the world, advances philanthropy by making it possible for people and organizations to practice effective and ethical fund raising.

DMAW is a 501(c)(6) regional trade association founded in 1955, with approximately 1,500 members in the Greater Washington Metropolitan area and nationwide. The DMAW website is www.dmaw.org. DMAW is the largest regional direct marketing association in the US. Most DMAW members are end-users, vendors, suppliers, agencies, freelancers, educators, and students in the Washington metro, Baltimore, and Central Virginia areas.

Conference History and Goals

AFP/DC has hosted the Fundraising Day Washington Conference (FDW) for 17 years and it has been one of the Chapter's signature events in fulfilling its mission of providing educational programming to its members and is a source of significant revenue.

DMAW has hosted its Annual Conference and Expo for more than 35 years and it is the premier educational and networking event for the association and is also a source of significant revenue.

In December 2005 the Boards of Directors of AFP/DC and DMAW reached a mutual agreement to jointly host a joint event that would be both the Fundraising Day Washington Conference and the DMAW Annual Conference and Expo. Planning for this event began in earnest in January 2006 and resulted in a conference that was an educational and financial success attended by more than 1,100 members, speakers, exhibitors, sponsors and other interested persons. This event carried forward the brands of AFP/DC, DMAW, and both of the predecessor events and was called the Bridge to Integrated Marketing and Fundraising Conference. The website is www.bridgeconf.org

The Bridge Conference relies on registered and paid attendees, sponsors, and exhibitors to be successful. Each of these different audiences (many of whom are members of the two host

organizations) is critically important but each has differing interests that must be accommodated. Both organizations wish to carry on with the first year success of this event and to expand it significantly and establish the event as a “must attend” event for fundraisers and direct marketers nationally and in the DC Metro area and even internationally. The 2007 event, will as it did in 2006, rely heavily on the strengths of both regional organizations and a large cadre of volunteers.

The conference is generally overseen by the Boards of Directors and Presidents and Presidents-elect of the two organizations. Management responsibility lies with a Bridge Conference Leadership Committee, which consists of overall conference co-chairs from AFP/DC and DMAW and similarly co-chairs from each organization heading six subject matter committees that plan everything from the educational program to logistics. These six committees are staffed by nearly 90 volunteers from both organizations.

The Committees are: Educational Programming (securing conference speakers and presenters), Marketing & Communications (promoting the conference), Logistics and Onsite Volunteers, Sponsorships, Exhibitors, and Social and Destination Events.

Scope of Services

The Bridge Conference is seeking proposals which can encompass some or all of the following activities from experienced meeting planners and volunteer coordinators (“contracted party”) to provide the following services. Proponents should clearly specify the services they are offering to provide and clearly exclude those that they are not offering to provide. Proponents may also propose additional services beyond those listed below but should carefully price such additional services separately so that such additional proposals can be considered. Proposals for different staffing models than specified will be considered but should contain justifications/explanation and basis for believing that our expectations can be met using the different approach. The Bridge Conference reserves the right to accept all or any part of any proposal (subject to mutual negotiation of the scope of work) or to reject any and all proposals in whole or in part. No incumbent proponent has any particular advantage or disadvantage in making a proposal.

Bridge Conference Summer 2007

1. Under the direction of the Conference Co-chairs, a lead person from the contracted party will be a key member of the Bridge Conference Leadership Committee and will be responsible for planning and coordination of the activities outlined below.
 - a. The lead individual bid by the contracted party must be named in your proposal and must be available to be interviewed concerning same.
 - b. This person must commit to spending a minimum of 25% of their time devoted to conference planning and coordination activities during the months of October – December 2006; 40% of their time devoted to conference planning and coordination activities during the months of January – March 2007; and 100% of their time devoted to conference planning and coordination activities during the months thereafter until the conference is held and then 50% of their time for one month after the conference is held compiling reports and assisting with “clean-up” activities.

- c. This person must commit to spending a minimum of 40 hours per week and sometimes additional hours as needed during the final month leading up to the conference and cannot take vacation time or holidays (excepting the 4th of July) during this final month because their full time and attention will need to be devoted to the conference.
 - d. Other staff shall be proposed as needed to work under the direction of the lead person either preceding the conference or “on-site.”
2. The Contracted Party is to develop written timelines for each of the volunteer committees and a master timeline for the conference and submit them to the Bridge Conference co-chairs. After approval these timelines are to be monitored by the Contracted Party and discrepancies noted to the conference co-chairs.
3. The Contracted Party is to propose and submit arrangements and planning, including budgets, copy, drafts, blue lines and public statements as appropriate to the Bridge Conference co-chairs for approval and then to communicate approved materials to the appropriate parties. As the various volunteer committees are organized and meet, the lead person from the Contracted Party is to meet with them to communicate and share information from other committees and to assure strong and seamless coordination amongst the various volunteer groups such that each is aware of the needs and plans of the others and the Bridge Conference co-chairs are aware of and approve all plans.
4. The Contracted Party will prepare a logistics plan including:
 - a. Develop specifications for the venue based on number of meeting rooms and event space needed. Assign space to various uses.
 - b. Review the final proposed hotel or venue contracts, make changes and additions when necessary. Block and track sleeping rooms, meeting rooms and event space.
 - c. Meet with venue staff on an ongoing basis. Schedule venue walk-throughs as needed.
 - d. Determine food & beverage functions and develop budgets for each.
 - e. Meet with Catering Manager, plan menus and negotiate costs and services.
 - f. Monitor all food & beverage functions, and review all invoices before approval.
 - g. Secure bids for Audio-visual support and coordinate with the selected vendor.
 - h. Plan signage for the entire event. Determine signage needed. Solicit bids and award contract for signage, banners and speaker name tents and coordinate with the selected vendor. Proof final signage and arrange for delivery. Note that signage may be a donated item.
 - i. Assist the volunteer logistics committee with planning volunteer manpower for the event, holding training sessions and providing instructional and directional materials to the volunteers, and then monitoring their fulfillment of their duties.
 - j. Secure bids for Security support and coordinate with the selected vendor.
 - k. Secure bids for exhibit hall and other decorations and coordinate with the selected vendor.
5. Assist the volunteer Marketing Committee – by coordinating their activities with the other committees and communicating and reminding others of due dates and providing warnings to the Marketing Committee and Bridge Conference co-chairs if and when it appears that those deadlines might not be met.

- a. Proof read and editorially contribute to all marketing material for the Bridge Conference including all on-line materials and the printed sponsor and exhibitor prospectus, registration brochure and onsite program including developing a full conference program agenda, and full listings of all workshops, tracks, and speaker information.
 - b. Coordinate with the volunteer design firm and volunteer production firms all of the above marketing materials.
 - a. Work with the volunteers to secure bids for design and printing services (primarily focusing on securing pro bono services, if feasible)
 - b. Serve as a liaison between designer and printer for all marketing collateral
6. Pre-Registration and On-site Registration
- a. Receive, process and track attendee registration forms and fees. Send confirmation receipt and conference information.
 - b. Work with website vendor (or donor) on coordination of registration software and website registration page(s).
 - c. Provide registration reports on a regular basis to the Conference Leadership and the Executive Directors of AFP/DC and DMAW, including registration to date, individual workshops/tracks registration, specially ticketed events, etc.
 - d. Print badges and event tickets and, if required, prepare registration envelopes.
 - e. Coordinate rental of computers and printers for on-site registrations.
 - f. Handle requests for refunds, process correspondence and payments as approved.
7. Exhibitors and Sponsors (Contracted parties may propose that this service be provided on a commission basis, in which case the basis for the calculation of the commission should be noted in your proposal and this service should be excluded from your proposed fee schedule).
- a. Recruit exhibitors from the prior Bridge Conference and help volunteers develop a comprehensive exhibitor recruitment list based on all exhibitors at AFP International Conference, the DMA Annual Conference and other similar conferences and events as well as advertisers in appropriate publications indicating interest in Direct Marketing and Fundraising. Track volunteer or paid staff efforts to contact parties on the recruitment list.
 - b. Establish advertising deadlines for program book, tote bag and inserts. Work with volunteers to insure that these deadlines are met.
 - c. Coordinate selection of tote bags, obtain bids and determine cost per budget.
 - d. Research and negotiate with exhibit service companies for best possible rates and services. Assist in designing the exhibit hall floor plan.
 - e. Receive and process exhibitor registrations. Produce reports as requested.
 - f. Send confirmations, booth assignments and other information to registered exhibitors/sponsors.
 - g. Collect all exhibit, sponsorship, and advertising fees and deposit same.
 - h. Mail attendee registration list three weeks prior to the Bridge Conference to those exhibitors who have requested and paid for the list.
 - i. Supervise exhibit hall set-up and interact with exhibitors throughout the event. Provide staff for exhibitor registration and exhibit hall monitoring.
 - j. Contract for security company on-site when exhibits are closed.
 - k. Send thank-you letters and final list of registrants to exhibitors within 30 days following the Bridge Conference. Fulfill any required conference attendee lists to exhibitors who have requested and are owed the list.

8. On-Site Management

- a. Provide staffing and oversight for on-site management, including:
 - pre-event setup
 - registration
 - exhibitor assistance
 - special event supervision
 - track monitors (volunteers)
 - speaker assistance (volunteers)
 - floaters/information (volunteers)
- b. Pre-event setup, including making sure all materials has been received and preparing badges. The contracted party will, along with AFP/DC staff, DMAW staff and Bridge Conference volunteers, handle onsite registration set-up and bag stuffing.
- c. Under the contracted party's direction, volunteers and AFP/DC and DMAW staff will handle placements of signs, supervise room setups and AV equipment, and provide dean and speaker assistance, record attendance and control the flow to sessions.

9. Coordination of Speakers, Track Deans, Workshop Coordinators:

- a. Work with the Education Committee to identify all speakers/panelists/presenters and then secure all information from the speakers including AV request form, photo and bio, registration, and detailed session descriptions and handouts. Handle processing of all speaker confirmation letters, reimbursement requests, fees and honoraria and thank you letters to speakers.
- b. Follow up with speakers as necessary to retrieve all necessary information and to invite them to participate in marketing the conference through their own devices.
- c. Coordinate between speakers, deans, speaker coordinators, hotel conference manager and AV company.
- d. Mail thank-you letters to speakers within thirty days.
- e. Compile a database of speakers/track deans and topics to document the program and provide the compiled evaluation data by speaker.

10. Evaluations

- a. Work with the appropriate conference committees and volunteer vendors to produce streamlined evaluation forms; coordinate the collection individual session evaluations as well as beginning, middle, and ending room attendance counts, and overall program evaluations at the end of the event.

11. Accounting

- a. Develop budget for approval. Monitor budget vs. actual. Handle accounts receivable and payable.
- b. Receive all payments, send confirmation/receipts and keep accurate records. Send regular reports to Presidents, Presidents-Elect, Treasurers, Executive Directors and Conference co-chairs from both AFP/DC and DMAW.
- c. Provide financial reports as requested and prepare a final accounting report.
- d. Prepare a registration report
- e. Prepare a sponsorship report
- f. Prepare an exhibitor report
- g. Provide a summary report that ties the attendance numbers in each category out to the financial information.

Additional Information to be Included in your Proposal

1. Cover letter introducing your company
2. Information about your company, including:
 - a. Location
 - b. Number of years in business
 - c. Staff size, composition (by position) and areas of expertise (if applicable)
 - d. Business hours.
 - e. Client List
 - f. References (particularly relating to similar activities)
 - g. Financial stability
 - h. Services offered by your company
 - i. Business insurance and third-party fidelity bonding of employees
 - j. Demonstration of capability to handle full function of conference planning, registration processing and logistics
3. Technical capabilities (indicate whether in-house or outsourced):
 - a. Desktop publishing and design
 - b. Software programs (including database)
 - c. Conference registration software or access to same
 - d. Other
4. Experience in handling the duties listed in the Scope of Services.
5. Name of lead person proposed
 - a. Agreement of that person to terms including time availability as specified.
6. Cost proposal, including:
 - a. How clients are billed
 - b. Projected cost for requested services
 - c. Commissions (if any are proposed) on exhibit marketing and sales
7. Three client references (name of organization, name, phone number and e-mail address of president; number of members; number of years they have been a client).

Questions can be directed as below. Responses will be shared with all recipients.

Proposal Submission

Please submit (3) copies of your proposal to:

Geoffrey W. Peters, President
Creative Direct Response
1670 Village Green
Crofton, MD 21114
Ph.: 301-858-1500
Fax: 301-858-0107
Cell: 301-675-7741

Deadline for submission: September 15, 2006 at 5:00 p.m.

Thank you for your interest in working with AFP/DC and DMAW on the 2007 Bridge to Integrated Marketing and Fundraising Conference.