



## Request for Proposals – NEFE 30<sup>th</sup> Anniversary Celebration and Conference

The [National Endowment for Financial Education \(NEFE\)](#) has issued a Request for Proposals (RFP) for an event planner or production company to assist in planning NEFE’s 30<sup>th</sup> anniversary celebration and multi-day thought leadership conference in Denver in early Q4 of 2022.

The National Endowment for Financial Education (NEFE) [champions effective financial education](#). We are the independent, centralizing voice providing leadership, research and collaboration to advance financial well-being. NEFE envisions a nation where everyone has the knowledge, confidence and opportunity to live their best financial life.

### Project Summary

NEFE commemorates its 30th anniversary in 2022. Using this milestone as an anchor point, NEFE hopes to convene and engage its stakeholders to reflect on how far the field of financial education has come and set the course for the next three decades.

This event will target influential organizations focused on financial education and well-being, national and regional educator groups, grant makers, thought leaders, influencers, researchers, and more. This event is meant to be cross-audience, to facilitate high-level learning and working sessions that move the field forward across [the personal finance ecosystem](#). The outreach will include both friends/peers of NEFE and organizations/individuals of interest.

We are seeking support and guidance from a professional company that is skilled in planning celebrations and conferences. We are particularly interested in those local to the Denver metropolitan area or the Rocky Mountain region, but we will gladly accept proposals from elsewhere. Firms with experience planning events for nonprofit, philanthropic or educational clients are of particular interest.

### Event Scope Overview

The event consists of two main parts: the celebration dinner and the conference.

The celebration dinner will be held the night before the conference. It will include a networking/cocktail reception, a 60-90 minute program during dinner—including a keynote from a prominent guest speaker—and celebration activities after dinner.

The conference will be one to two-and-a-half days long. A single ‘track’ may be the most effective way to organize the event, though NEFE will consider breakout sessions if that format serves our goals. The conference should include networking opportunities, working sessions/roundtables on key field topics, and group learning sessions on core concepts. While NEFE is an organization that puts research at the center of its activities, we do not plan to include a call for research paper submissions for this event.



We intend to host this event in Denver, CO, and do not plan to include a virtual component. We anticipate an audience of 200-250 attendees for the anniversary celebration and 150-200 attendees for the conference. We are targeting early Q4 2022 for the event. COVID risks are a primary concern, so we are asking for guidance both on planning for contingencies and for managing the health and safety of attendees.

### **RFP Response Requirements**

The term of the contract will span from late Q4 2021 until Q4 2022. NEFE is targeting October or November 2022 to host this event, so the contract should cover planning, execution, and event wrap-up. Individuals, organizations, associations, or other interested parties may apply for the contract through this Request for Proposals (RFP). All interested participants will need to review the RFP to ensure compliance with all requirements. NEFE is not responsible for reimbursement of expenses related to submitting a proposal in response to this RFP.

Proposals should include:

1. Cover letter
2. A description of relevant capabilities and services that can be used to plan and host this event
3. Statement of the organization's qualifications, including any examples of similar projects executed for nonprofit, philanthropy or educational clients
4. Background of key personnel who will be involved
5. Estimated cost proposal and/or pricing model
6. Statement of the organization's expectations and approach to working with clients on event production projects
7. Share your organization's strategy and initiatives around diversity, equity and inclusion including how your firm's leadership demonstrates its commitment and how your staff are supported in these efforts. For example, what initiatives are in place to recruit, retain, and advance a diverse workplace? Include a description of practices, programs, services, community involvement and/or internal operations, such as information about your corporate social responsibility program.

NEFE expects an open dialogue with the event planning firm, including regular calls and/or written updates on progress (a schedule will be determined collaboratively by NEFE and the firm).



Completed proposals must be received at NEFE no later than **Monday, December 6 at 7 a.m. Mountain Time**. No late proposals will be accepted. Submissions must be made by email; no phone calls, please.

Emailed submissions should be sent to Lanell Daniel-Knight, Manager – Institute Administration ([lknight@nefe.org](mailto:lknight@nefe.org)). The vendor will be selected and notified by Friday, December 17.

More information about NEFE can be found at [www.nefe.org](http://www.nefe.org).

*This is a confidential process; by participating in this RFP, you agree to maintain confidentiality throughout the duration of the submission process and review stages. Please note all communication relating to this requirement and the associated procurement process shall be through the sole contact mentioned above. NEFE reserves the right to disqualify any vendors who make direct contact with any member of the staff other than this contact.*