

**REQUEST FOR PROPOSALS**  
**FOR**  
**COUNCIL OF INFRASTRUCTURE FINANCING AUTHORITIES (CIFA)**  
**CIFA SRF WORKSHOP DIRECTOR**

**Proposal Deadline: December 6, 2024**

**Council of Infrastructure Financing Authorities**  
**Request for Proposals for CIFA State**  
**Revolving Fund Workshop Director Services**

**1. Overview and General Information**

The Council of Infrastructure Financing Authorities (CIFA) invites individuals, firms or organizations to submit proposals to serve as CIFA's Workshop Director which performs professional services to procure venues and vendors, manage contracts, develop and solicit content, organize, and facilitate the Annual CIFA State Revolving Fund (SRF) Workshop, which is an in-person conference. If the proposal is submitted by a firm or organization, a specific individual must be named that will serve as the CIFA Workshop Director. CIFA received financial support from the Environmental Protection Agency (EPA) under an assistance agreement that will be utilized to pay for these services.

The term of the contract is expected to start February 1, 2025, through December 31, 2025, with an optional one-year renewal.

This RFP does not obligate CIFA to award a contract. CIFA reserves the right to retain all proposals and to use any ideas in a proposal regardless of whether that proposal is selected. CIFA reserves the right to reject any and all proposals without explanation.

Anyone requiring further clarification of the proposal procedures contained herein should submit specific questions by e-mail to: [Treasurer@cifanet.org](mailto:Treasurer@cifanet.org) by 4:00 pm (Eastern) November 13, 2024, so that questions and responses may be posted publicly by November 25, 2024. Questions and responses will be posted on the CIFA website at [www.cifanet.org](http://www.cifanet.org).

Proposers will be required to comply with the president's Executive Order No. 11246 (Equal Employment Opportunity) regarding discrimination.

Proposers must fully comply with Subpart C of 2 CFR Part 180 and 2 CFR Part 1532 (Responsibilities of Participants Regarding Transactions Doing Business With Other Persons). Contractors, subcontractors, or suppliers that appear on the Excluded Parties List System at [www.sam.gov](http://www.sam.gov) are not eligible for award of this contract.

Proposers should understand that all contracts and subcontracts exceeding \$100,000 will have to comply with the Anti-Lobbying Act, Section 319 of Public Law 101-121, and file an Anti-Lobbying Certification form, and the Disclosure of Lobbying Activities form, if required, to the next tier above.

Proposers should understand that current registration in the System for Award Management (Sam.gov) will be required before contract execution.

Proposals must be submitted electronically to [Treasurer@cifanet.org](mailto:Treasurer@cifanet.org) by 4:00 p.m. (Eastern) December 6, 2024.

The CIFA Workshop Director Search Committee will review all proposals. Interviews of selected finalists will be conducted between December 17-20, 2024.

The successful proposal is anticipated to be announced by January 10<sup>th</sup>, 2025.

## **2. Background**

The Council of Infrastructure Financing Authorities is a national organization of state, regional, and local entities working for needed water infrastructure funding from governments and capital markets and for effective use of those financial resources. CIFA membership includes Clean Water and Drinking Water State Revolving Fund (SRF) managers and other water infrastructure finance professionals.

CIFA holds an annual SRF Training Workshop in the Fall that is supported in part by a federal grant from the U.S. Environmental Protection Agency. The Workshop convenes water professionals from across the water sector and around the nation to learn what is working, what is new, and what is next for the SRFs.

The CIFA SRF Workshop objectives are:

- Provide meaningful and relevant instruction with proven policies, processes or practices that SRF staff can adopt to improve the effectiveness, efficiency, responsiveness and adaptability of their programs.
- Provide a forum for the SRF community to share experiences and expertise to spur programmatic problem-solving and foster professional growth for SRF staff at every stage of their career.
- Help develop a workforce with knowledge and skills to tackle current and future challenges with water infrastructure financing and project development.
- The CIFA SRF Workshop will offer up to 38 hours of onsite courses.
  - Day 1: Pre-Workshop Session: SRF 101 (three to four hours)
  - Day 1: Pre-Workshop Session: Interactive Exercise (three to four hours)
  - Day 2: Workshop: Up to 12 breakout sessions (75 to 90 minutes) (breakfast, lunch and dinner)
  - Day 3: Workshop: Up to 8 breakout sessions (75 to 90 minutes) (breakfast)

The anticipated deliverables include high-quality professional development, with approximately 16 high-quality courses to individuals with a range of learning styles including:

- Plenary sessions with inspirational and motivational speakers;
- Direct instruction with panel presentations;
- Roundtable discussions to encourage peer-to-peer knowledge-sharing; and
- Field trips that offer first-hand observations of real-world operations and construction projects.

### **3. Scope of Services**

The CIFA Workshop Director will be responsible for providing professional services for conference planning, conference administrative services, and overall implementation for the annual Workshop for State Revolving Fund Programs. The CIFA Workshop Director will coordinate with the CIFA Executive Director regarding logistics for CIFA Members meetings and other events that are held before and after the CIFA SRF Workshop and at the same venue. The CIFA Workshop Director will also receive recommendations from the Professional Development Committee while planning for the event. Tasks for the scope of services include:

- Logistical Planning:
  - Conduct a competitive procurement for venues (hotels and off-site events) and vendors (audio visual providers).
  - Negotiate contracts.
  - Identify and manage vendors for audio visual, program materials, and off-site events.
  - Serve as liaison with the hotel staff including sales manager, event manager, banquet manager and staff, and room reservations staff.
  - Manage hotel room reservation block arrangements and changes.
  - Plan food and beverage.
  - Plan room set-up.
  - Develop plan for technology (Internet and audio visual).
  - Plan field trips, including tours of water facilities and educational opportunities.
  - Plan off-site evening receptions and dinners.
- Program Development:
  - Develop pre-conference, program development survey.
  - Develop process to solicit proposals (abstracts) for presentations and sessions.
  - Conduct outreach to members, partners and EPA to identify topics for sessions.
  - Draft the agenda/program (up to 20 sessions).
  - Identify and invite plenary speakers.
  - Identify and invite presenters, panelists and moderators for breakout sessions.
  - Conduct planning meeting with each panel.
  - Develop run-of-show.
- Event Preparation:

- Design banners/brand for website and marketing emails.
- Write session descriptions.
- Collect bios and headshots.
- Design program.
- Set up registration process in Cvent.
- Design and build registration website on Cvent.
- Select and purchase conference materials.
- Prepare name badges.
- Prepare table tents.
- Event Management
  - Manage registration desk.
  - Troubleshoot logistical issues.
  - Serve as liaison with venue staff.
  - Document, track, and submit invoices for payment of costs.
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- Post-Program:
  - Post presentations on website.
  - Develop post-conference attendee satisfaction survey.
  - Develop attendance list.
  - Prepare Certificates of Attendance.
  - Collect payments.
  - Prepare progress reports.

It is acceptable for some of these activities to be subcontracted or delegated to a firm's staff. If subcontractors are used, procurement must be competitive and comply with requirements found in 2 CRF 200.318 through 2 CRF 200.327.

#### **4. Format & Contents of Proposal**

The proposal must include the following sections:

- A. Cover letter. Include the name of the individual, firm, or organization, and the address and contact information. If a firm or organization, the proposal must name the individual who will serve as the CIFA Workshop Director.
- B. Qualifications. Describe the background, experience, and capabilities of the proposer as it relates to the Scope of Services outlined above. If the proposer is a firm or organization, the proposal must describe the background, experience, and capabilities of both the firm or organization and the individual who will serve as CIFA Workshop Director as well as any staff or subcontractors that would be used. Include examples of current or prior clients and references.
- C. Scope of Services. Describe the methodology and approach of how you would

accomplish the different categories under the Scope of Services outlined above. If proposing major deviations from those services, the deviations must be clearly noted and justified. Please also describe any additional services that you feel would be beneficial to the success of the Workshop.

- D. Cost. Provide a proposed hourly rate for the Workshop Director and any proposed support staff or subcontractors, as well as an estimate of annual hours per staff level that will be spent to perform all services described above. The hourly rate should include the cost of all benefits and overhead. Approved costs for materials, vendor contracts, venue, event meals and snacks, field trip costs, and travel to the event will be paid by CIFA and should not be included in the hourly rates provided.

## **5. Evaluation of Proposals**

The proposals will be evaluated based on the following criteria and point system:

- Response format as required by this RFP – up to 5 points.
- Understanding of the services needed– up to 10 points.
- Methodology and approach to providing the scope of services – up to 25 points.
- Experience in providing like services– up to 15 points.
- Knowledge of State Revolving Fund Programs – up to 15 points.
- Qualified personnel – up to 15 points.
- Cost – up to 15 points.