



October 1, 2014

The Safe Routes to School National Partnership is very pleased to invite prospective host agencies to apply to organize the 5th Safe Routes to School National Conference, to be held sometime between August 2015 and March 2016.

In partnership with the National Center for Safe Routes to School, we look forward to hosting the conference in a dynamic and walkable, bikeable location with strong Safe Routes to School and healthy communities initiatives that can be featured during the conference.

Being in the company of hundreds of people who share goals about advancing Safe Routes to School will foster new partnerships, ideas and projects. This synergy can be a real boost to local and state efforts, long after the conference is over. In addition, benefits of hosting the National Conference include:

- Bring national recognition to the host organization and city as leaders in Safe Routes to School.
- Provide a boost to the local economy as hundreds of attendees come to your town.
- Build more state and local support for your Safe Routes to School, active transportation and healthy communities initiatives and strengthen ties with local stakeholders.
- Engage the media in showcasing the importance of Safe Routes to School funding and programming in your city and state.
- Participate in inspiring teambuilding and networking opportunities amongst participants from your city, state and across the nation.

The three-day, two-night National Conference will provide an opportunity for an intense training experience not otherwise available to people working on Safe Routes to School programs and policies. The conference needs to accommodate possible pre- and post-conference activities – so the main conference would be held Tuesday through Thursday, with Monday and Friday set aside for the pre- and post-conference activities.

The following pages include a list of roles and responsibilities for the conference host, along with instructions on how to apply. Completed applications are due on November 12, 2014 by 5pm EDT. Questions about the application process can be submitted to margo@saferoutespartnership.org.

We look forward to receiving applications for hosting the 5th Safe Routes to School National Conference and learning more about the growth of Safe Routes to School in your community.

Sincerely,

A handwritten signature in black ink that reads "Margo Pedroso". The signature is written in a cursive, flowing style.

Margo Pedroso
Acting Director
Safe Routes to School National Partnership

Request for Agency to Host the 5th Safe Routes to School National Conference

I. Introduction

The [Safe Routes to School National Partnership \(National Partnership\)](#) is soliciting applications from institutions and organizations interested in the opportunity to host the 5th Safe Routes to School National Conference, to be held between August 2015 and March 2016. The purpose of the conference is to provide an opportunity for individuals and organizations interested and involved with Safe Routes to School and healthy community design initiatives to network, engage in educational opportunities and form partnerships to enhance their work.

The intent of this request is to identify and select an experienced organization that will be responsible for conference and event support, planning, coordinating, fundraising and implementing all aspects related to a three-day national meeting of 500-700 Safe Routes to School program representatives, state DOTs, engineers, elected officials and community members.

II. Conference Background

The conference has been held on four separate occasions. For all prior conferences, the National Center for Safe Routes to School, which is the Federal Highway Administration’s clearinghouse for the federal Safe Routes to School program, and the Safe Routes to School National Partnership, which is a national nonprofit organization, have co-presented the conference. A local host was selected each year through a competitive RFP process to run the conference. The conference has grown in size each year, with attendees sharing knowledge and best practices around creating Safe Routes to School programs and policies and building healthy communities. Additional details about past conferences are provided below:

	2007	2009	2011	2013
Location	Dearborn, MI	Portland, OR	Minneapolis, MN	Sacramento, CA
Date	November 5-7, 2007	August 19-21, 2009	August 15-17, 2011	August 13-15, 2007
Local Host	Michigan Fitness Foundation	Bicycle Transportation Alliance	Blue Cross and Blue Shield of Minnesota	Local Government Commission
Number of Attendees	403	528	536	627
Site	Dearborn Inn	Hilton Portland	Meeting space at Minneapolis Convention Center; rooms at Hilton Garden Inn	Sheraton Grand Hotel
Conference theme	Creating, Building and Sustaining Momentum	Two Steps Ahead	Building Connections: Schools + Streets + Communities	Building on Success—Projects, Programs, People

III. Organizational Roles

The 5th Safe Routes to School National Conference will again be a joint effort with the Safe Routes to School National Partnership, National Center for Safe Routes to School and the local host. These organizations' roles and responsibilities are as follows:

1. Managing Presenting Sponsor: Safe Routes to School National Partnership

The National Partnership will serve as the oversight organization to manage the application process and subsequent contract. Upon selection of a host agency, an agreement between the National Partnership and the host agency will be signed. In addition, the National Partnership will:

- Participate on the conference committee, the sponsorship committee and any other applicable subcommittees
- Assist with promotion of the conference to generate participation
- Participate in the selection of sessions and speakers
- Provide final approval of a venue, dates and registration fees
- Provide final approval of conference theme, branding and communications plan
- Supply advice based on the first four conferences and other national knowledge
- Work with the host agency to set key deadlines for conference planning
- Coordinate with the host agency about fundraising opportunities
- Possibly host an add-on meeting before or after the conference (such as a training academy or similar day-long event)

2. Presenting Sponsor: National Center for Safe Routes to School

- Participate on the conference committee
- Assist with advertising the conference to generate participation
- Participate in the selection of sessions and speakers
- Supply advice based on the first four conferences and other national knowledge

3. Host Agency: The agency or organization selected through this application process to manage the conference is the host agency. The host agency may be an institution of higher learning, a state or local agency, a state or local government agency or a non-profit organization. In addition to conference registration fees, funds raised by the host agency will provide significant financing for the conference and will be a necessary task. See section IV - Hosting Responsibilities for other detailed roles and responsibilities.

4. Conference Committee: Chaired by the host agency, this committee will include presenting sponsors and relevant organizations. The conference committee will make recommendations pertaining to graphic design for conference related materials, invitation of speakers, meeting venue, marketing strategies and other tasks as needed.

IV. Hosting Responsibilities

The conference is expected to be held between August 2015 and March 2016. Conference dates should not conflict with Walk to School Day or other conferences with similar audiences (such as the National Walking Summit, the National Bike Summit or the Smart Growth conference). It

is anticipated that approximately 500-700 persons will be in attendance over three days and two nights, Tuesday through Thursday preferred, with Monday and Friday available for pre- and post-conference activities held by partners (including possibly the National Partnership). The host agency is required to have available personnel either in-house or on contract who have been successful in the professional services and activities of large (300+ participants) conference and event support, execution, planning, fundraising and coordination services.

As directed by the conference committee, the services of the host agency and/or sub-contractors will include the following:

A. Overall

1. Designate and identify the individual who will be lead contact person for host agency.
2. Organize, perform and manage tasks necessary to meet the conference/event requirements and objectives outlined in this document.
3. Convene a conference committee to develop strategy and manage tasks.
4. Perform general project management.
5. Update National Conference website, www.saferoutesconference.org.
6. Carry out other conference or post-conference duties as assigned.
7. Develop a comprehensive communications/marketing plan to include the integration of social media – including Facebook and Twitter – into activities before and during the conference.
8. Develop a fundraising plan and manage outreach to secure funding; keep accurate financial records.
9. Prepare a post conference report to include, at a minimum, conference evaluation results, a database of participant contact information, a budget report and reports to funders, as well as any photographs or recordings managed by the host agency. This is due 45 days after the National Conference has ended.

B. Fiscal

Overall conference costs are estimated at approximately \$300,000, depending on the relative costs of the host city and conference venue, the amount and type of in-kind services provided by the host agency and others and other factors. The host agency accepts financial responsibility for the conference, and will absorb any profits or losses from the conference.

Generally, funds for conference support may be expected from the following sources: an estimated \$150,000 to 200,000 from meeting registration and an anticipated \$100,000 to \$150,000 from additional sponsors that must be solicited by the host agency, which may include the U.S. Department of Transportation and other potential sponsors such as other national, state or local government agencies and corporate, individual and foundation donors. The host agency should coordinate with the National Partnership on any national fundraising asks to ensure that the conference support requests take advantage of existing national relationships.

Specifically, host agency will:

1. Develop a fundraising plan and manage outreach to secure funding, in coordination with the conference committee and the National Partnership.
2. Develop sponsorship and exhibitor levels/guidelines. These guidelines can be adapted from the 2013 conference support levels and materials.
3. Propose a plan to provide scholarships for some National Conference participants. Please note: Specific numbers are not required but this item should be addressed in the narrative and proposed budget.
4. Recruit and secure financial commitments from local, state and/or national agencies or organizations to fund the conference, in coordination with the conference committee.
5. Collect registration fees.
6. Pay all conference-related invoices.
7. Provide a final budget/accounting of all income and expenses earned and expended by the host agency as a part of final conference report due within 45 days of National Conference.

C. Meeting Venue, Accommodations and Transportation

1. Procure competitive quotes from area hotels, convention centers or institutions (schools, universities, city facilities, community centers, other non-profits, etc.) available to host the conference sessions.
 - For the 2013 conference, the local host used Helms Briscoe to identify prospective hotels/meeting space and to negotiate cost-effective rates. There is no cost to the local host; all costs for this service are borne by the hotels themselves. Rebecca Cabral with Helms Briscoe can be reached at 928-237-5776 or rcabral@helmsbriscoe.com if you would like to use their services to identify and get competitive bids from hotels/meeting space in your area for this RFP. Rebecca also already has specs for the 5th national Safe Routes to School conference (which you can of course adapt) which makes it easier to get quotes on hotel rooms, meeting space, catering and A/V.
2. Negotiate contract terms with conference site. Terms are subject to final approval by the conference committee.
3. Negotiate reasonable rates, preferably at [government rates](#), for the lodging and accommodations for approximately 500-700 conference attendees within walking distance from the conference site.

D. Registration

1. Work with the conference committee to set registration fees and schedule for the various fees. Registration needs to be open no later than six months before the conference. Tiered rates (such as early bird registration, speaker rates and/or discounts for National Partnership partner affiliates) should be offered.
2. Provide the opportunity for participants to register online via the National Conference website, www.saferoutesconference.org, by fax or by mail.
3. Promote registration in conjunction with the conference committee.
4. Ensure that all sanctioned pre- and post-conference sessions and workshops are listed on the conference website and formally linked to the event, including registration.

5. Collect and process registration fees.
6. Maintain and update database of registered participants.

E. Logistics

1. Arrange, coordinate and schedule all conference-related meals, including refreshment services and breaks.
2. Determine A/V needs for each session and arrange for all necessary conference rooms, including any audio-visual equipment such as computers, projectors, overhead projectors, microphones, data port connection and video playback equipment.
3. Arrange for a photographer and videographer.
4. Provide on-site supervision during the conference, support personnel to the staff registration desk during the conference and help troubleshoot A/V needs for each session.
5. Coordinate with other organizations planning pre- and/or post-conference activities, including advertisement of activities on conference website and integration of registration.

F. Program development

1. Coordinate and lead the agenda/program review committee for selection of speakers and review/selection of session proposals. The committee will include the presenting sponsors, host agency and others as needed.
2. Solicit session proposals for presentations and workshops—preferably using a variety of session types for variety (i.e. pecha kucha, networking sessions, mobile workshops, etc.).
3. Secure organizers and speakers for sessions, ensuring diversity of speakers.
4. Identify diverse and engaging keynote speakers and negotiate keynote speaker(s) fees as appropriate within conference budget.
5. Arrange excursions (such as Safe Routes to School site visits, mobile workshops or local tours) as part of the conference program.
6. Ensure that releases are obtained from each speaker and/or presenter and that the conference proceedings are recorded (audio, video or multimedia).
7. Post all National Conference presentations on the website within 45 days of the event.
8. Provide a means for participants to evaluate the conference and the individual sessions.
9. Collect evaluation data and provide compiled data back to the presenting sponsors within one month following the conference.

G. Marketing/Communications

1. Obtain approval from the conference committee on the conference theme and key graphical treatment. These items can also be adapted from the 2013 conference graphical materials if need be.
2. Ensure that all mailings, invitations and registration materials are distributed in a timely manner.
3. Design, edit, produce and print all conference materials that will include, but not be limited to the following: meeting agenda, participant list, speaker list, handouts, name

badges, signage, information packets, bags and any other ancillary print materials required by presenting sponsors.

4. Assemble information/handout packets and/or collate printed conference materials.
5. Develop and distribute press releases for the event that will be approved by the conference committee (the presenting sponsors will assist with national distribution).
6. Conduct national outreach to generate interest in the conference through grassroots approaches by working with the presenting sponsors.
7. Maintain and update National Conference website, www.saferoutesconference.org, as needed.
8. Leverage social media – Facebook, Twitter, blogs and YouTube – both leading up to and during the conference.

IV. Application Requirements

Narrative

Each entity responding to the request must respond specifically to the following questions and provide complete information. Total length of response to items 1 through 9 should be no longer than seven to ten pages. Please use the bolded headers below before each answer.

1. **Applicant Information:** Provide the name of the lead organization or agency submitting the proposal and the following contact information: Name of contact person, representative organization, mailing address, daytime phone number, fax number, email address, and website.
2. **Organization's Involvement with Safe Routes to School:** Provide background on the applicant organization proposing to host the conference. Describe the entity's history, including involvement with and understanding of Safe Routes to School principles, programs and policies and indicate if you are a [partner affiliate](#) of the Safe Routes to School National Partnership. Describe motivations for hosting the conference and the qualities of host organization that make it uniquely qualified to be the host.
3. **Organization's Experience:** Describe recent experience planning or managing a similar project(s), in size and scope, and how those similarities might relate to planning this conference. Specifically, describe experience with meeting/event planning implementation and management capacity, knowledge, skills and experience to oversee the implementation of conference agenda.
4. **Personnel:** List the names and roles of each person that will be assigned to this project, and describe their experience with Safe Routes to School and conference planning. Specify which person will serve as the project lead. Indicate each person's capacity to manage activities and the level of effort on this project, including coordination with subcontractors or event planners and fundraising experience. Indicate which staff have attended prior Safe Routes to School conference, or similar national conferences.
5. **Location and Dates:** Identify the proposed location for the conference meeting and hotel accommodations (including estimated room rate), and proposed dates. The preference is for the conference to take place on Tuesday through Thursday, with Monday and Friday available for pre- and post-conference activities held by partner organizations (including potentially the National Partnership). (See Section IV for more information about the date range for the conference). Describe attributes of the host city that you think would be

appealing to conference participants, i.e. proximity to non-regional airport, local bike/ped infrastructure, nearby Safe Routes to School projects that could be toured, etc.

6. **Partners:** Please describe the state and local partners (agencies, nonprofits, etc) that you envision working with to put on a successful conference. Also indicate how and if the state DOT will be involved with the conference (which is strongly encouraged). While letters of intent are not required, it is helpful to have support letters from key partners indicating their potential role in conference planning and execution.
7. **Fundraising:** Describe your approach to fundraising for this conference. Identify potential targets and describe fundraising goals and approaches to secure funding for the conference. If you have any commitments in hand, letters of commitment are strongly encouraged.
8. **Budget:** Provide a draft budget for the conference for both income and expenses and a proposed registration fee structure, including a plan on how applicant will provide for scholarships within the budget.
9. **Creative Approaches:** Describe what makes your approach to planning and carrying out a national conference unique or particularly interesting to attendees. Creative ideas for session formats, mobile workshops or related events are welcomed. Also, include your initial thoughts on a conference theme plus at least three ideas for keynote speakers that you believe you could secure for the conference and why they would be inspirational or informative for attendees. Please also include ideas for how young people could be involved in the conference, and how the conference will be inclusive of equity and diversity.

Appendices:

Appendices do not count towards the maximum page length for the narrative.

1. Provide a draft work plan, including a timeframe for the conference with quarterly milestones. If selected to be the host agency, the timeline will be finalized and included in the signed agreement between the host agency and the National Partnership within 21-30 days of being selected as conference host site.
2. Provide at least three letters of support from clients or organizations that have worked with the entity in the last five years.
3. Provide letters of intent from partners or vendors that you plan to work with if selected, outlining what their role will be in the conference planning, funding or execution. (Optional)
4. Provide commitment letters from funders that have committed to provide financial support to the conference, including the amount and purpose of the funding. (Optional)

VI. Summary of Required Contracting Provisions

If a proposal is selected, the applicant will be required to sign a binding agreement with the Safe Routes to School National Partnership. Until both parties have signed an agreement, no express or implied commitment has been made to authorize an announcement about the conference. Applicants are not authorized to commence work until the agreement is fully executed. If applicants opt to commence work, they do so at their own risk. No oral or written statement other than the signed, written agreement will govern or modify the relationship.

VII. Filing Deadline

All proposals should be received by 5:00 EDT on November 12, 2014. We reserve the right to contact respondents to schedule a Q&A session by phone. The National Partnership anticipates selecting the host agency by mid-December 2014, with the project beginning immediately thereafter upon contract execution.

VIII. Submission

Please submit proposals electronically as a PDF. You can find out more about the submission process at <http://www.saferoutespartnership.org/conference>.

All files must be submitted as one PDF and should be titled using the name of your organization, city and state separated by underscores with no spaces. For example:
XYZ_organization_city_ST.PDF.

Once you submit your application electronically, you will receive an email confirmation of its receipt.

If you have additional questions, you may contact margo@saferoutespartnership.org.

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