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## **Request for Proposals: Energy Finance Conference Organizer September 2019**

The Institute for Energy Economics and Financial Analysis (IEEFA) is seeking experienced candidates or firms to oversee organizing our annual 3-day Energy Finance conference to be held in Manhattan in the summer of 2020 (likely June, date TBD).

We are looking for a seasoned events planner or firm, with a strong track record of effectively organizing multi-day, international events in New York City.

### **Background and Event Specifications**

Through our global research and analysis, IEEFA's mission is to accelerate the global transition to a diverse, sustainable and profitable energy economy.

IEEFA's annual 3-day Energy Finance conference convenes hundreds of financial analysts, energy experts, environmental advocates and attorneys from around the world. The [agenda for IEEFA's last Energy Finance conference](#), held June 2019, is available here.

Our 2019 conference was our largest gathering ever, with 370 attendees from 33 countries and across the U.S. The conference consists of 3 tracks, alongside 20+ side meetings, roundtables and informal lunch discussions.

The template for organizing this conference, now in its ninth year, is well-developed, and many of our partnerships with attendees, funders, speakers, venues and vendors go back many years. For the past several years, the conference has been held at Columbia Law School, and negotiations are in currently in progress for 2020.

The Energy Finance conference is a Zero Waste event.

The conference is free for attendees. In partnership with several funders, IEEFA offers needs-based travel and lodging stipends to individuals from non-profit organizations. Direct conference costs, not including event organizer compensation, run between \$175-200K. IEEFA anticipates accommodating 400 participants for Energy Finance 2020.

### **Scope of Work**

The Conference Organizer will be responsible for coordinating all conference logistics, including:

- Finalizing a conference invitation list in coordination with IEEFA's international team.
- Researching and recommending upgrade options for the event's online registration platform, in order to accommodate the conference's growing attendance list.

- Designing and sending event invitations. Invitations are sent to new prospective attendees on a weekly basis in the months leading up to the conference.
- Promptly responding to all inquiries on conference logistics from potential attendees and speakers.
- Tracking all event expenses, in coordination with IEEFA, and keeping them within budget parameters.
- Tracking all requests for travel and lodging stipends, and communicating with attendees on stipend approvals. Payments will be handled through IEEFA and our funding partners.
- Booking rooms for international attendees through our partner hotel, and negotiating the group rate for these stays.
- Acting as IEEFA's primary liaison with the conference venue. This includes finalizing dates; mapping out available space and room capacity; and submitting and following up on facilities requests and AV requests on deadline. (Note: the conference is likely to be held at Columbia Law School, but if for some reason that location is not confirmed, the Conference Organizer would work with IEEFA to find and secure a conference venue).
- Helping coordinate space and technical support for side meetings that are requested during the conference.
- Coordinating facilities requests associated with Zero Waste needs during the event, in partnership with IEEFA and local vendors.
- Coordinating planning—including contracts, timelines, equipment and facilities needs—with all event vendors.
- In cases where new vendors are needed, researching and recruiting outstanding local providers who are well-aligned with the event's mission and needs, in coordination with IEEFA.
- The conference agenda will be organized by the IEEFA team, but the Conference Organizer will be asked to follow up with panel organizers and provide panel organizing support as needed.
- Researching and contracting for technical solutions to new logistical needs, such as recording panels for distribution after the event or having live translation during sections of the conference.
- Processing visa support letters for international participants who request them.
- In select cases, may assist in booking travel for those who need it.
- Supervising a team during the event to ensure proper room and tech set-ups; clear signage and directions; efficient registration and food set-ups; and proper event clean up.
- Communicating with speakers on presentation needs and collecting all presentations prior to the conference.
- Producing signage and nameplates for the event.
- Managing event follow-up in coordination with IEEFA, including reporting back on conference outcomes; ensuring invoices and reimbursement requests from vendors and speakers have been submitted; and giving event feedback to vendors.

## Qualifications

We are seeking an experienced events planner or firm with:

- Excellent attention to detail and deadline management;
- Exceptional follow through;
- The ability to effectively troubleshoot and problem solve in a team environment;

- Clear, timely communication skills, both remotely and in person;
- Extensive knowledge of local vendors, event planning platforms and tech solutions for conferences;
- Background in organizing events involving international participation;
- Experience with Zero Waste event organizing a plus.

We are seeking candidates based in New York City, with experience working with local vendors. Minorities and women are encouraged to apply.

## To Apply

We anticipate that conference planning will begin by late 2019, with the work load increasing leading up to and during the conference. Several weeks' follow-up will be required after the event.

Applicants should submit all of the following materials to the attention of **Sandy Buchanan, IEEFA Executive Director** at [positions@ieefa.org](mailto:positions@ieefa.org) by **COB October 5, 2019**. Please include the phrase "IEEFA Conference Organizer" in the subject line. No phone calls please.

- **A 1-2 page outline of how you will provide the services within the event timeframe specified above, along with total compensation expected for providing these services.**
  - Applicants are welcome to outline other services they believe would be required for the successful organization of Energy Finance 2020.
  - If you are applying as a firm, please outline your plan for designating a lead staff person to manage this work.
- **2-3 examples of international events of similar scale to Energy Finance 2020 that you or your firm have been responsible for organizing, including:**
  - Event Title and Host Organization
  - Date/s of Event
  - Event Budget
  - Number and Geographic Spread of Event Participants
  - Event Venue/s
  - A brief description of your role in organizing the event. Please indicate any relevant overlap with the event specifications and scope of work outlined above for Energy Finance 2020.
- **2 references (with current contact information) from organizations for whom you or your firm have organized events.**