<u>PROPOSAL</u>

Tasks and Budgets
Support of the 2019 Event

for
The IEPEC Board

by
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Christensen Associates Energy Consulting, LLC (CA Energy Consulting) is pleased to submit this proposal to provide maintenance, planning, logistics, and general support for the 2019 conference to the IEPEC Board. The work described in this proposal is designed to:

- Take advantage of the market presence built by the 2017 conference to make it easier to solicit sponsors, recruit papers, and ultimately sign-up participants and help support our North American and international educational market efforts through such activities as:
    - Job and RFP postings.
    - Supporting and encouraging traffic to the website through email campaigns and coordinating with other related organizations to help co-promote events.
    - Posting and promoting use of the abstracts from the 2017 event on the website.
    - Posting and promoting the full paper sets on IEPEC's website, and especially the recent collection from 2017.
    - Upgrading our website to be GDPR (European Privacy Requirement) compliant and improve library search functions.
- Provide a single point of contact for anyone interested in the work IEPEC does and help to connect organizations to appropriate experts to help build more market awareness for the value of evaluation.
- Continue to respond to questions about the organization and requests for evaluation information.
- Update the mailing lists used for the Call for Abstracts for Papers and conference participant recruitment.
- Support for sponsor recruitment including grant writing to the Sloan Foundation for student financial support to enable students to attend our conference.
- Manage all communications required for confirming speakers and obtaining materials for proceedings.
- Prepare the proceedings for posting on-line.
- Manage and lead informational training webcasts for moderators and speakers.
- Manage registration process.
- Provide comprehensive on-site support.
- Make recommendations for and manage the IEPEC website.
- Make recommendations for and manage the conference recordings if funded and desired.
- Facilitate the Lifetime Achievement Award selection process.
- Maintain the Colleges and Universities Directory.
- Provide final accounting.
- Conduct an evaluation survey for the conference as directed by the evaluation committee.
- Secure planning committee site and provide on-site support for the planning meeting in January 2019.
- Attend meeting as directed by the IEPEC President.
- Provide backstop support to committees as needed.

This past year we used our post-conference evaluation to solicit ideas for 2019. The overwhelming endorsement of Denver made it clear that the center of the country was the preferred site.

We continued to improve the mailing list keeping in mind the need for privacy requirements that have become active as of May 2018 including removing addresses that are no longer functional.

The format of this proposal is to describe the tasks, note expected outcomes, and provide a budget for staffing requirements. We also provide an estimate of direct expenses; however, these direct expenses are not part of this contract and are listed here only for planning purposes. The direct expenses are the responsibility of IEPEC North America. CA Energy Consulting may incur some direct expenses (e.g., travel, printing, postage, and on-line tools) for which IEPEC will reimburse CA Energy Consulting separate from the support service contract. For the years 2018-2019 (January 1, 2018–December 31, 2019), we budget $121,829 for labor and estimate direct expenses (materials, hotel costs, and services) to be $282,305.

Task 1: Website Update, Maintenance, and Abstract Posting (and ongoing emails)

We will work as an advisor to the website committee and implement changes at their direction so the website remains a relevant media site and in compliance with privacy requirements. The main goal is to maintain the most comprehensive, searchable database for evaluation literature, including proceedings from conferences.

Ongoing maintenance needs to be done to respond to inquiries, provide key conference planning logistic dates as soon as possible, and handle any technical issues that arise as the site grows in functionality. The website is a very strategic asset for garnering sponsorship from organizations who generally only support educational initiatives.

Update of the Website to Support Traffic: We will update and help support traffic that comes to the website. We will check all links and repair, with technical help from PowderKeg, as needed. We will review and screen posting requests for RFP's and job openings, and confirm posting and removal activities.

Maintenance: We will also provide around fifteen hours per month for the monthly maintenance work on the website. If we anticipate that a fix will take more than this amount of time, we will notify the Board for direction.

Addition of Abstracts, Proceedings, and Presentations: We will post all papers, posters, and panel sessions; PowerPoint presentations; and the final set of proceedings that are provided to us and approved for posting. We will prepare a table of contents with links that will take the reader to a specific abstract in a separate window. We will also put a direct link in the document to allow people to order or access the IntelliQuest recordings and past proceedings on-line.

Expected Outcome:
- A vibrant website that promotes all posted events and the upcoming 2019 event for maintaining visibility for the organization.
- A website that is professional, functional, and relevant to the field of evaluation.

- Posted abstracts, PowerPoint presentations, RFPs, Job Openings, and other networking opportunities that should help drive traffic to the site.

Labor	Total Hours	Direct Expenses
$22,108	346	$4,000 - PowderKeg

Task 2: Sponsor Recruitment and Management

Working with the sponsorship committee we will assist with recruitment of sponsors. This task will include:

- Emails to past sponsors reminding them of upcoming deadline dates that have promotional value.
- Status spreadsheets on sponsorship will be kept in a "DropBox" file for reference.
- Invoicing and tracking of arrangements.
- Working with sponsors to make the most of their sponsorship either on-site or on our conference website app.
- Developing options for sponsors to secure their commitment that meets their value objectives.

Benefit:
- Sponsors will be encouraged to post the event on their calendars and to include it in newsletters.

Expected Outcome: We can evaluate sponsorship drive effectiveness by number of dollars and sponsors secured.

Labor	Total Hours	Direct Expenses
$6,414	63	None.

Task 3: Prepare and Distribute the Call for Abstracts for Papers

We will work with the abstract planning committee. Following their direction, we will:

- Update the timeline and process for the *Call for Abstracts*.
- Update the website text on the *Call for Abstracts*. This year the website will be the only place to find details about what is being recruited.
- Produce and distribute by First-Class Mail the *Call for Abstracts* postcard once final copy is delivered to us.
- Update the website to promote the *Call for Abstracts* and be ready to receive abstracts.
- Conduct our email marketing campaign
- Create and manage the collection tool (Survey Monkey).

Expected Outcome: A robust response to the *Call for Abstracts*. We will send out at least five email campaigns to promote submissions. We monitor our "bounce rate" on our emails thus ensuring that we do not get black listed. We use google analytics to observe trends in the email addresses, subject lines, and general timing of delivery.

This task assumes that the call for abstracts committee delivers camera-ready copy of the postcard and that we arrange for the printing and distribution of the card. By using first class postage for the postcards, we can clean out our mailing database of dead addresses. This benefits our program announcement costs as we will have a cleaner list.

Labor	Total Hours	Direct Expenses
$6,602	57	Production: Postcards For 6,000 pieces: $1100 Estimated postage costs are: $2,500-3000

Task 4: Abstract Processing

Once the *Call for Abstracts* is out and responses begin to come in, we will:

- Assign each abstract a unique number and enter into an Access database.
- Cross tabulate abstracts for tracking purposes.
- Remove any identifying information to ensure a blind review process.
- Prepare a master copy that will remain in Madison for confirmation.
- Group abstracts into topic areas as noted on the response tool.
- Survey the planning team to determine research areas of interest.
- Create reviewing teams.
- Create electronic packets for tracking decisions.
- Answer any questions and provide support to the review teams as needed.

Expected Outcome: An efficiently run and defensible reviewing process.

Labor	Total Hours	Direct Expenses
$6,456	54	$805

Task 5: On-Site Planning Meeting Support

On-site at the January 2019 Planning Committee Meeting, CA Energy Consulting will:

- Confirm site arrangements.
- Aid the planning teams.
- Prepare the materials used by the planning groups for easy on-site management.
- Track session decisions.
- Collect reviewer's reports for use in answering questions about why a paper was not selected.
- Assist with preparing background information.
- Discuss decisions that need to be made such as number of workshops, evening event, special breakfast meetings, etc.
- Assist with decisions on conference and workshop fees.

Expected Outcome: All decisions are tracked and a draft program is proposed including ideas for extra events and keynote speakers.

Labor	Total Hours	Direct Expenses
$8,206	62	$12,000

Task 6: Paper, Poster, Panel, Moderator Confirmation, and Program Development

Once the Planning Committee has made their selections, we will prepare and send out confirmations to authors including a description of the process that they must follow regarding everything from the paper submission process to registration fees. We will request a response within ten days so we can begin the process of filling in with back-up papers. This letter will contain detailed instructions for paper submissions, expectations for how their session will run, and the names and contact information of fellow session authors and their moderator (if selected). We will work in parallel to create the poster session. CA Energy Consulting will provide contact information to the Poster Chair and note acceptance or non-acceptance in our tracking database.

Once confirmations are in, we will prepare a draft agenda and then give it to the President and the chairs to make changes as needed. In creating the final agenda, they can also identify program holes that need filling. We will work with moderators to fill the holes from the list of papers not initially accepted for the conference.

For people who are not selected, we will send out an acknowledgement of their submission's status and invite them to call us to find out why their paper was not accepted and encourage them to attend the conference.

We will contact the trainers of approved workshops and ask them to create appropriate descriptions for the brochure (short) and website (long).

We will also confirm options for the networking and evening social event for board selection.

Expected Outcome: This process will allow us to quickly identify authors who may or may not wish to participate. Speed will be important, as we will not send out non-acceptance notices until the program is set. Thus, we can help moderators fill holes in the program while avoiding informing potential speakers that they were not accepted on the first cut.

Our confirmation letter puts everyone involved in the session in touch with each other and re-enforces that we expect all authors to review the work by their fellow authors. Our follow-up letter to non-accepted authors hopefully builds a cordial and professional relationship that results in attendance at the conference.
With all these elements looked after, we will have the bulk of the materials needed to move forward with quickly publishing the recruitment agenda/brochure.

Labor	Total Hours	Direct Expenses
$11,732	94	None.

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Task 7: Moderator Training

We will conduct a moderator's review session. Any moderator who does not attend the webcast will be contacted directly by CA Energy and walked through the process.

Expected Outcome: Moderators will understand that they have an **active** role to play, thus improving paper quality, presentation materials, session content, and flow.

Labor	Total Hours	Direct Expenses
$1,235	9	$500

Task 8: Marketing

CA Energy Consulting staff will conduct the following marketing activities.

Outreach Plan Post Abstract Recruitment:
- Brochure: In the mail April 2019.
- Postcard: Early Bird Registration, June 2019.
- Possible Postcard: "There is still space available," notice to potentially electronically blocked entities, July 15, 2019.
- Emails: We will send emails in between mailings as appropriate—usually once or twice a month with increasing frequency as we get close to deadlines, such as the hotel closing, different registration fee closings, keynote speakers, and the conference itself.

Additional Tasks:
We will also prepare recommendations for any requested collateral materials and work with the appropriate committee regarding other item(s) that should be included in the registration packet.

Expected Outcome:
We expect to exceed 450 attendees to this event, however for planning purposes we base costs on 400.

Labor	Total Hours	Direct Expenses
$4,640	32	$20,000

Task 9: Lifetime Achievement Award

CA Energy Consulting will work with the Lifetime Achievement Award committee to send out recruiting notices and manage incoming applications. The committee will make the final decision and notify the candidate. CA Energy Consulting will arrange for the awards that are to be handed out.

Expected Outcome:
Recruitment and notification for the Lifetime Achievement Award.

Labor	Total Hours	Direct Expenses
$888	6	$200

Task 10: Room Manager Recruitment

CA Energy Consulting staff will recruit student volunteers to help with conference room management. We will:

- Recruit from colleges/universities as appropriate and find approximately 10-12 student volunteers.
- If invited, we will write the grant application for funding students to the Sloan Foundation to assist with expenses incurred by student volunteers and student poster presenters.
- Provide volunteers details on what to expect.
- Provide on-site training for student volunteers.
- Arrange for on-site mentoring for all students in attendance.

Expected Outcome:
Smooth-running sessions that introduce and attract students to consider a professional career in the area of evaluation. The mentoring will enable IEPEC professional attendees a chance to meet with possible new hires.

Labor	Total Hours	Direct Expenses
$2,194	24	None.

Task 11: Final Weeks

During the final weeks prior to the conference, CA Energy Consulting will:

- Work with the hotel regarding hotel rooms and finding additional room options if our selected hotel sells out.
- Work with sponsors to ensure that they make use of their sponsorship benefits.
- Help register people who may have difficulties due to international time zone differences.
- Work with the hotel on final AV, food, beverage, and space set-up needs.
- Handle various issues that arise.
- Design and copy attendee materials to support attendance at the conference. This may include hotel maps, meeting room locations, evaluation forms, participant lists, and name tags.

Expected Outcome: Our goal is to:

- Maximize networking opportunities by placing as many of our participants in our event hotel as possible.
- Build better relationships with sponsors by helping them obtain as much value as possible for their sponsorship dollars.

- Be cost effective by accurately ordering what we need for AV and catering.
- Manage last minute issues or opportunities as they arise and thus increase the perceived value of the event to participants.
- Assure that the flow of the conference is smooth.

Labor	Total Hours	Direct Expenses
$14,725	165	$16,000

Task 12: Registration (Based on 400 registrants)

We will offer online and hardcopy registration services. We will:

- Open our online credit card process.
- Track payments—checks and credit cards.
- Re-invoice as needed.
- Prepare special invoices as needed.
- Maintain a database to track different characteristics of each person, for example, if they are a speaker, have they
  - Paid any penalties?
  - Paid registration for the conference and special events?
- Prepare and track invoices.
- Work with the IEPEC Treasurer in reconciling accounts.

Expected Outcome: A clean and tracked registration process that accounts for all monies owed.

Labor	Total Hours	Direct Expenses
$10,200	200	$13,000

Task 13: Arrange for Electronic Publication of Conference Proceedings

CA Energy Consulting will competitively select a publisher for the conference proceedings, consistent in content and appearance with previous editions.

We will create the boilerplate information for the proceedings. Authors will submit their electronic pdf papers to CA Energy Consulting. Once all papers have been submitted, CA Energy Consulting will implement the on-line submission process to the printer and will verify paper order, author, and co-author information.

Expected Outcome: A professional, searchable proceedings in electronic format.

Labor	Total Hours	Direct Expenses
$6,184	58	$4,200

Task 14: On-Site Assistance

CA Energy Consulting will provide three staff who will arrive prior to the conference and begin final preparations for the event. We will:

- Help prepare registration materials.
- Confirm room arrangements.
- Train temporary staffing support.
- Set-up additional committee meeting for the Board and Planning Committee if needed.
- Review banquet order.
- Train student volunteers.
- Review AV order.
- Review room sets and traffic patterns.
- Identify engineering issues.
- Set up and maintain a registration table for the entire event.
- Work with sponsors.
- Set out signage for sessions.
- Solve problems. Solve problems and solve more problems.
- Provide speaker assistance.
- Organize Monday workshops and event opening reception.
- Organize informal events.
- Coordinate any post-conference workshops.

Expected Outcome: Workshops and a 2.5-day conference that runs as smoothly as possible featuring two receptions (one a poster session) and one networking social event.

Labor	Total Hours	Direct Expenses
$15,439	173	$207,500

Task 15: Social/Networking Event

Work with the planning team to organize the welcoming reception and the social networking excursion. This includes researching options, arrangements for food and drink, and registration management.

Expected Outcome: Events such as our social networking allow participants to meet and talk with people from the conference in a relaxed setting. If they choose to just sit and watch the world go by, they can and not feel awkward. Past reviews indicate the social outing is an excellent networking event that adds value to the conference.

Labor	Total Hours	Direct Expenses
$796	8	None.

Task 16: Wrap-Up and Final Accounting

As in the past, CA Energy Consulting will assemble final reports summarizing the conference milestones, turnout, and enter evaluation data for analysis by the IEPEC Evaluation Manager. We will:

- Tabulate evaluations and forward the results on to the evaluation team.
- Review and finalize the hotel bill.
- Prepare and deliver a full set of documents, forms, etc. on a CD to the President and to any other parties as required by contractual arrangements.
- Add Powerpoint presentations to the website.

Expected Outcome: A fully documented event.

Labor	Total Hours	Direct Expenses
$2,530	42	None.

Task 17: Webcasts

Webcasts
Working with the webcast committee, CA Energy Consulting will support at least three different webcasts for the interim year of 2018/2019. These webcasts will:

- Effectively cover topics that can be covered in 60 minutes.
- Include more than one voice on the line—to ensure an interesting program for attendees.
- Be evaluated for content, speaker capability, and suggestions for new materials.

CA Energy Consulting will also:

- Recruit attendees once final copy is provided to us from the committee.

Approach: The committee will solicit ideas from our moderators as to presentations that they think can be usefully discussed in a 90-minute block. For all webcasting, we will rely on the DOE for media support.

Expected Outcome: At least three webcasts. This outcome is consistent with the IEPEC mission to accelerate and advance the field of energy program evaluation and provide an understanding of the critical role evaluation plays in improving the utilization of energy resources.

Labor	Total Hours	Direct Expenses
$1,480	10	None.

Facts and Numbers

Conference Rates

	2003 - Seattle, WA (231)	2005 - Brooklyn, NY (286)	2007 - Chicago, IL (319)	2009 -Portland, OR (420)	2010 -Paris, France (128)
Early Registration	$495 (118)	$495 (180)	$545 (209)	$545 (226)	$525 (68)
Regular Registration	$550 (55)	$595 (63)	$645 (44)	$645 (121)	$700 (28)
Student	$300 - no responsibility	$300 - no responsibility (1)	$300 - no responsibility	$300 - no responsibility (4)	
	$175 - on-site support	$175 - on-site support	$175 - on-site support	$175 - on-site support	
Workshop	$125 - full day $55 - half day (67 ppts)	$125 - full day attendee $200 - non-registered (l05 ppts)	$130 - full day attendee $200 - full day non-registered $65 - half day attendee $100 - half day non-registered (131 ppts)	$130 - full day attendee $200 - full day non-registered $65 - half day attendee $100 - half day non-registered (142 ppts)	$175 - full day $90 - half day (79 ppts)

	2011 - Boston, MA (446)	2012 - Rome, Italy (147)	2013 – Chicago IL (477)	2014 – Berlin, Germany (185)
Early Registration	$545 (249)	$525 (through 3/9) (68)	$635	€ 575 ($703)
Regular Registration	$645 (130)	$620 (3/19-5/1) (16)	$685	€ 675 ($822)
Late Registration		$745 (after 5/1) (15)	$735	
Student	$300 - no responsibility (4)	$300 - no responsibility (7)	$300 no responsibility	€ 475($578) - no responsibility (26)
	$175 - on-site support	$0 - on-site support	$175 on-site support	$0 - on-site support (15)
Workshop	$130 - full day/conf attendee $200 - full day/not attending conf $65 - half day/conf attendee $100 - half day/not attending	$55 - conf attendee $65 - not attending conf (36 ppts)	$130 - full day/conf attendee $200 - full day/not attending conf $65 - half day/conf attendee $100 - half day/not attending conf	€ 65.00 ($79) – full day € 45.00 ($55) – half day (53 ppts)

			conf (160 ppts)	(163 ppts)	
	2015 – Long Beach, CA (459)	**2016 – Amsterdam (178)**	**2017 – Baltimore MA**	
Early Registration	$655 through 5/22 (251)	€535 through 15 March (76)	$645 through 5/21 (189)	
Discounted Registration	$695 through 8/3 (110)	€635 through 16 May (15)	$695 through 7/21 (111)	
Standard Registration	$750 after 8/3 (5)	€700 after 16 May (6)	$745 after 7/22 (10)	
Student	$300 - no responsibility (4)	$0 scholarship (25)	$300 – no responsibility (0)	
	$100 - on-site support		$0 – on-site support (14)	
Workshop	$150 - full day $75 - half day (99 ppts)	$0 (76 ppts)	$150 - full day $75 - half day $45 – ¼ day (98 ppts)	

Special Events

2003 - Tillicum Village 162 participated	**2005 - NY Skyline 156 participated**	**2007 - Chicago River & Lake Michigan 220 participated**	**2009 - Willamette River 256 participated**	**2011 - Boston Harbor 287 participated**
$35 - registered	$50 - 17 and above	$40 - registered	$50 - registered	$60 - registered
$65 - non-registered	$15 - 5-16 years old	$60 - non-registered 12 & above	$60 - non-registered 17 & above	$65 - non-registered 17 & above
$25 - 5-12 years old	Free - under 5	$25 - 5-11 years old	$35 - 4-16 years old	$40 - 3-16 years old
		Free - under 5	Free – under 4	Free – under 4

2013 Chicago River & Lake Michigan 250 participated	**2015 Rainbow Harbor Cruise – 200 participated**	**2017 Harbor Cruise – 243 participated**		
$60 – registered	$72 – registered	$40 - registered		
$65 - non-registered 17+	$72 - non-registered 17+	$80 – non-registered 17+		
$40 - 3-16 years old	$55 - 3-16 years old	$40 – 3-16 years old		
Free – under 3	Free – under 3	Free – under 3		

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Abstract Submissions

2003 - Seattle, WA	2005 - Brooklyn, NY	2007 - Chicago, IL	2009 - Portland, OR	2010 - Paris, France	2011 - Boston, MA
176 Papers	187 Papers	210 Papers	227 Papers	156 Papers	258 Papers
2 Posters	5 Posters	10 Posters	6 Posters	18 Posters	10 Posters
7 Panels	16 Panels	11 Panels	19 Panels		13 Panels
5 Workshops	8 Workshops	10 Workshops	9 Workshops	7 Workshops	10 Workshops

2012 - Rome, Italy	2013 - Chicago, IL	2014 – Berlin, Germany	2015 – Long Beach, CA	2016 – Amsterdam	2017 – Baltimore
216 Papers	329 Papers	172 Papers	335 Papers	148 Papers	237 Papers
13 Posters	12 Posters	Posters	5 Posters	3 Posters	17 Posters
	19 Panels		17 Panels	9 Panels	10 Panels
4 Workshops	6 Workshops	5 Workshops	9 Workshops	9 Workshops	7 Workshops

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