



European Evaluation Society Request for Proposal (RFP) for Conference Management Services (Professional Conference Organisation, PCO)

October 2022

The present call seeks a Professional Conference Organiser (PCO) for the European Evaluation Society (EES), and we invite suitably qualified organisations or individuals within a consortium to submit proposals as per the information and specifications set out below in this Request for Proposals (RFP) by **18.00 hours on the 18th November 2022** Central European Time. The contract would be for an initial period of two years and may be extended for subsequent two-year periods, based on performance. The contract is expected to be signed before the end of 2022, with activity being required from that time forward and in particular in preparation of the next EES conference in autumn 2024.

1. Introduction

The European Evaluation Society (EES) is the pan-European society of evaluation professionals (www.europeanevaluation.org). Its primary goal is to promote theory, practice, and utilisation of high-quality evaluation in Europe and beyond. Our vision is a world where evaluation contributes to human welfare through learning and accountability. Specifically, the EES seeks to advance evaluation knowledge and encourage the adoption of good practices by fostering evaluation excellence, independence, and partnerships. EES activities aim to support improved enabling environments for evaluation, stronger communities of practice, relevant evaluation research and enhanced evaluation methods. EES was initiated in 1992 and registered in 1996 as a non-profit association in the Netherlands. The EES professional conference organiser can operate from elsewhere, but the EES legal status is founded on Dutch law.

Whilst the main responsibilities of the EES conference organiser will be to manage, plan and logistically organise the next biennial conference due to take place in autumn 2024 (location as yet to be confirmed), this RFP also includes support for EES non-conference event management and organisation. Full details of the requirements for EES conference and events services are set out below.

2. EES Background and Information

The EES is a membership-based organization consisting of individual and institutional members. Members comprise evaluation professionals from academia, consultancies, and public and private organisations working at national, local, international, or bi/multilateral levels. Currently, the EES has a membership of 702

individuals and 43 institutional members. The list of institutional members can be found on the EES website (see: <https://europeanevaluation.org>). The EES is governed by an elected Board consisting of 9-12 Board members, including co-opted members. The officers within the Board comprise President, Vice President, Secretary General and Treasurer. The EES Board is responsible for coordinating and initiating the activities of the Society, and Board members work on a fully voluntary basis. Additionally, the EES has a Communications and Administration Manager who is employed by the Society on a part-time basis (approximately two-fifths of a full-time position).

The Board members “meet” regularly – generally once per month online and, if possible, also, once a year in person to discuss and develop the work plan. Within the Board, there are sub-teams on “Finance”, “Communications”, and the “Conference” to assure a smooth managerial and operational process. The Conference co-ordination team on the Board is responsible for conferences and events and will be key in liaison with the PCO to be appointed under this RFP. Additionally, there are currently seven Thematic Working Groups (TWGs), which set their own targets and activities but operate under the umbrella of the EES.

The activities of the EES include (but are not limited to) the following:

- Organises a major Evaluation Conference every two years in a European location.
- Organises Professional Development Workshops (PDWs) in association with the Evaluation Conference.
- Organises or co-hosts occasional half to one day face to face events.
- Organizes the online events series and its recordings.
- Maintains and updates the membership database and the membership processing.
- Ensures that all subscribed EES members have access to the “Evaluation, the International Journal of Theory, Research, and Practice” depending on their membership category (printed copies to be sent quarterly and/or electronic access)
- Prepares a monthly EES newsletter, “EuropEval Digest” (with the inputs of the Board’s Comms team) sent exclusively in electronic form.
- Interacts frequently with EES members and keeps them informed of all queries received via phone and email.
- Implements the communications campaigns, e.g. handles the logistics for uploading the podcasts “EvalEdge” and Blogs, shares regular emails with all EES members and others in the evaluation community, and shares the prepared information on social media channels.
- Supports the Thematic Working Groups (TWG) notably through communications support and web site.
- Maintains and updates EES’ website on a regular basis, which includes jobs/tenders, online events, trainings, events/conferences (shared by EES board members and via a weekly scanning).
- Maintains and updates the EES conference specific web site including details of conference themes and topics. This includes all related information designed for

the conference programme, call for abstracts, FAQs, conference related blogs and associated information.

- Maintains and updates its website with evaluation-specific resources such as evaluation standards, glossaries, guidelines and handbooks, tools and checklists, web tools and software, evaluation journals, links to other evaluation organizations in Europe and beyond.
- Supports the implementation of partnerships such as the p2p Career + Advisory for Emerging Evaluators and the Decade of Evaluation For Action (Eval4Action), and possibly more in the future.
- Maintains the database of all national VOPEs (Voluntary Organisations for Professional Evaluation) in Europe, as well as networks with other evaluation societies and networks.
- Organizes an Annual General Meeting, organizes the annual membership survey and carries out other managerial tasks.
- Supports other activities (see EES website) and additional ones in future, yet to be identified.

Association Management Services are provided by the EES Secretariat, BayTree VA, an association management company based in the UK. The Secretariat provides the administrative support to the EES on Board matters, membership administration and maintenance, document management, support to liaison with VOPEs and Thematic Working Groups, newsletter, incoming and outgoing payments and support for financial statements, marketing and the EES main website maintenance (the EES conference website exists as a separate site to be managed by the PCO recruited under this RFP). This present RFP concerns conference and event management services as a separate provision to the EES Board. The expected duties are detailed below.

3. Background to EES Conferences and Events

Since the start of the Society, the EES has organised fourteen biennial conferences in many European countries, most recently in Copenhagen in June 2022 with the theme, “*Evaluation at a Watershed: Actions and Shifting Paradigms for Challenging Times*” (see conference web site: <https://www.ees2022.eu>). This event was attended by 682 delegates and the programme extended over 3 days with an average of 14 parallel strands and around 290 sessions offering a mix of modalities (panels, roundtables, posters, fishbowls, grouped papers, birds of a feather, meet the authors, and meet the evaluation, poster sessions, plenary sessions including 3 keynotes). Conferences are preceded or followed by two days of professional development workshops, generally there are up to 20 of these with up to 20 participants per workshop, each running for one day (exceptionally two). The workshops are facilitated by evaluators/trainers of repute.

The EES also runs online events and occasional face to face events in between the biannual conferences. These bring together evaluators, evaluation managers, evaluation commissioners and professionals from diverse backgrounds and disciplines. EES also reaches out to other global, regional, and national evaluation societies and networks. Over the last two years the EES has run a successful online webinar series and a two-day online conference preceded by two days of online

professional development workshops, in September 2021. In 2023, the EES intends to offer one or more half day face to face events as well as three to four online webinars. The PCO will be expected to support the EES Board team in the management of these events. As the non-conference event programme is yet to be confirmed, the proposer is not required at this stage to furnish estimated full costings of support to the events programme. However hourly/daily rates for event support should be included.

The 15th biennial conference is in the planning stage and support to its organisation will be a key role for the new PCO. The conference will take place in autumn 2024 in a venue yet to be decided. The choice of location is generally made in collaboration with a European VOPE and according to the availability of a suitable venue. The EES aims to confirm the venue of the 2024 conference by the end of 2022 and the PCO will be expected to support EES negotiations and contractual arrangements with the venue over the services to be provided. The conference organisation and set up will be similar to previous ones in duration and modalities, though we anticipate a slightly smaller event of around 600 in-person participants. Copenhagen 2022 conference incurred higher overall costs than previous conferences, and the budget was approximately 550,000 euro. EES aims to improve the event's cost effectiveness in 2024. The EES will also explore possibilities for livestreaming – see section 4 below. The 2024 conference will also be preceded or followed by 2 days of in person professional development workshops, The conference, professional development workshops, half day and full day online and face to face events will be directed by a team(s) from the EES Board on a voluntary basis with support from the Communications and Administration Manager. The PCO will work in close coordination with these persons. Please see the EES website for information on past conferences.

4. PCO Role and Responsibilities

EES is looking for a Professional Conference Organiser (PCO) to provide logistical support (including, wherever relevant, IT support) to the conference, the associated professional development workshops and the 2023 programme of short events. This can be an organisation or company, for profit or non-profit, with documented experience in the organisation of international conferences of a similar nature and the ability to support such a conference in a European city. Whilst the conference will be planned as a face-to-face event, it will include, additionally, online recording and possibly also streaming the main conference event in part or whole depending on costs and availability of requisite facilities. If feasible the EES will wish to also consider a fully hybrid conference and proposers are invited (but not obliged) to consider a hybrid option in their tender, where a hybrid conference is understood as one which uses a combination of in person and digital elements tailored for optimal audience experiences.

Please note that EES conference planning, programming and participant registration are supported by a software tool, Conftool Pro (see: <https://www.conftool.net/en/index.html>). This tool allows for handling the major organisation elements of the conference including: call for abstracts, bulk email correspondence with submitters and conference participants, lodging and peer review of abstracts, conference programming and scheduling, participant registration and some (but not all) participant payments. The EES team will manage the essential

actions related to conference organisation on this tool but will require the PCO to be able to work with the software and provide support to the EES conference directors on the management of these tasks. In particular, the PCO will be required to support recording and reconciliation of attendee payments some of which are made by bank transfer, credit card, or through PayPal.

Funding for the conference and pre-conference workshops derives partly from fees paid directly by participants. In addition, the EES seeks sponsorship for the event, including bursaries for participants from the global south and for young and emerging evaluators. Sponsors in the past have included major UN and other international agencies as well as prominent consultancy firms. The PCO will be expected to support the campaign for sponsorship funding and to manage the open call for and award of bursaries.

The basic requirements/tasks for this assignment are as follows:

1. Manage the 3-day conference and associated 2-day professional development workshop service as a full project with responsibility for all logistical matters and support to the Conference Directors on administration including on (but not limited to) Conftool-Pro.
2. Liaison with the venue and arrangements for all sessions and facilities. Ensure optimum use of the spaces for conference and professional development workshops covering plenary hall, break out rooms, reception rooms, speakers' preparation room, catering for coffee breaks, lunches, conference dinners, local event(s). The PCO will also be required to manage the printing and display of posters (between 10 and 20). The PCO will ensure that all conference and professional development workshop presentations are available at the appropriate time in each room. Usually this is done through delivery of USBs containing presentations by the conference presenters in advance to the PCO IT staff who then ensure the presentations are coordinated and delivered to the IT facilities including projection screen and laptop in the designated rooms prior to each session. Information technology requirements for the 3-day conference itself may include hybrid elements and certainly, video recording of keynote speakers and some of the major sessions at the event and for such, the PCO will be expected to secure or directly provide the required facilities.
3. Manage information technology facilities for online events such as for webinar or similar (we have used Zoom or similar applications for past online events).
4. Provide support to the EES Board team to organise and manage online webinars and occasional face to face half/one day events.
5. Establishment, operation, and post-conference maintenance of a conference website, which will become the property of the EES.
6. Organisational presence on conference site, i.e., organisational office hosting the PCO's conference manager and her/his team for the full working week of the conference with printer, copying machine, Internet connection, etc. The PCO will be responsible for the smooth running of the conference and

ensuring that conference presentations are managed for delivery in the appropriate room at the appropriate time (see 2 above).

7. Support the administration of sponsorships and bursary arrangements. This will include liaison with conference and bursary sponsors, administration of payments, management of bursary winners travel and accommodation arrangements and administrative support to the EES conference team on production and dissemination of sponsorship brochure.
8. Support to the marketing of the conference, webinars, and short events.
9. Handling all incoming and outgoing conference payments, and appropriate financial reporting on the conference in close collaboration with the EES accountant/auditor and the Conference Directors. While most individual conference and workshop participant fees are handled automatically by payment systems in ConftoolPro (Stipe/PayPal), payments for groups of attendees are done through invoicing and bank transfer and these need to be managed directly by the PCO.
10. Liaising as appropriate with relevant stakeholders (EES Board, EES Secretariat, local agents, delegates, etc.).
11. After the conference, provide conference report to EES Board and other interested stakeholders (e.g., sponsors). This report is to be delivered in English.

5. EES Professional Conference Organiser (PCO) - Institutional Arrangements

Generally, it is expected that the EES PCO will cover all the required tasks and a **PCO Manager** needs to be appointed. He, she, or they shall be the person implementing the majority of tasks and will be responsible for team coordination. The PCO's Manager will also be the main contact person for the EES, **often on a daily basis**.

The exact division of labour between team members proposed by the PCO needs to be well described in the Technical Proposal. Ideally, the proposed individuals / consultants have already worked together in the past. If not, the Technical Proposal needs to demonstrate how they will collaborate. EES is looking to contract a team that is slim, efficient, and focused.

Individuals engaged in the EES PCO are not considered as employees of the EES since the working arrangements are based on a **service contract** and they will need to keep monthly time sheets.

6. Process for call for Proposals

a) Submission of Technical Proposal

The Technical Proposal in English shall contain the following information in one document:

1. The name of the bidder(s), seat, and address.

2. Proof of legal authorization/status/registration details/business license, company profile, website links.
3. An overall understanding of the assignment and motivation for responding to this call.
4. A detailed description of the current organisational office structure and facilities including IT equipment.
5. A table/profile of previous similar assignments including conferences organised in non-EU/EU European countries, which adheres to the qualifications, experiences, skills and demonstrated expertise in delivering the tasks for this assignment, including the number of similar conferences organised over the past 5 years, with an indication of duration, number of delegates, approximate number of parallel sessions (if applicable) and location.
6. Number of employees dedicated to Conference Organisation in respect of total employees.
7. An overview of the EES Professional Conference Organiser composition, a work plan (division of labour) and how different individuals will work together, if applicable.
8. Annual turnover over the past 3 years and respective share of this turnover of conference and event organisation.
9. CVs of people suggested including three referees for each person plus 2 recommendation letters from similar clients.
10. A signed declaration of availability of all suggested individuals for this assignment.
11. A description of quality control procedures in place for conference organisation services. These should include a short statement on issues related to inclusivity, gender, and environmental responsibility, organisational policies and how these will be included in the delivery of services.
12. EES is committed to environmental sustainability and inclusivity and the proposer should specify their policies and practices for ensuring sustainability and inclusivity in respect both of their own personnel and in their approach to supporting EES policy in this respect.

b) Submission of Financial Proposal

The Financial Proposal in English shall include the following information:

Allocation of personnel per task per hourly rate. Estimated monthly total days expended with total net costs and total costs including VAT. Estimated costs for specific on-site conference tasks estimated for 5 days at conference venue. At this stage, travel cost estimates are not required.

7. Award criteria and process

An ad hoc sub-committee of EES Board will be convened to review proposals received. The members will examine the technical proposals of each submitter in respect of competencies in conference organisation and management, PCO staff

competencies, procedures and organisation and evidence of understanding of and commitment to the tasks specified. The marks allocated under review of the technical proposal will comprise 60% of the total mark. The financial proposal will be reviewed on its cost effectiveness on the basis of costs per person per hour and total estimated costs for onsite staff provision at the venue. The marks allocated to the financial proposal will comprise 40% of the total mark. The selection of short-listed candidates will be made on the total mark as representing value for money of the bid

8. Timetable

The subsequent indicative timetable is as follows:

- **18.00 hours CET 18th November 2022:** deadline for submission full proposal in response to this RFP
- **7th December 2022:** one-hour on-line interview with short listed PCO candidates (to be scheduled between 12.00 and 17.00 hours)
- **9th December 2022:** final selection of service provider
- **18th December** contract signature and start of conference process

Proposals should be sent only by electronic mail to the EES Secretary General, at SG@europeanevaluation.org and **should not exceed 10 Mb**. References to websites (e.g., download of annual reports, additional documentation) are allowed as submission material if explicitly referenced in the EoI. Should submitters request further clarifications, these should be addressed to the EES Secretary General, and the texts of bidders' queries (anonymised) and the Secretary General's responses will be made available on the EES website are concerned with this call during the call period on a running basis.

DISCLAIMER

The European Evaluation Society or its Board: cannot be held liable for any costs incurred by potential candidates in preparing their proposal and such costs will not be reimbursed; maintains the right to not communicate about any decisions regarding the selection; reserves itself the right to at any time stop the qualification process without having to communicate the reason for this to any potential candidate.