

## **REQUEST FOR PROPOSAL**

### **National Grantee Summit – Event Planning Consultant**

#### **Overview**

The Climate and Clean Energy Equity Fund (The Equity Fund) is seeking an experienced event planning consultant or facilitator, on a time-limited basis, to collaborate with our staff team in planning and executing the 2026 National Grantee Summit. **This summit will likely take place in a major US city in March, April, or May 2026** and will bring together approximately **300** participants from across the country, including **250 grantee partners and 30 Equity Fund staff members**, over the course of 3 days.

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#### **Scope of Work**

The selected consultant will provide the following services and deliverables in support of the 2026 National Grantee Summit:

##### **1. Project Management, Event Planning and Coordination:**

- Help the Equity Fund develop the vision and key objectives of the National Grantee Summit.
- Assist in the development of a comprehensive planning timeline with key dates and benchmarks to meet.
- Develop an event plan, including logistical details, and key objectives.
- Develop a plan for staff engagement in the planning and execution of the Summit.
- Facilitate regular event planning meetings involving Equity Fund staff.
- Assist the Equity Fund with the venue selection and venue contract process
- Give guidance for the event budget management.
- Support Equity Fund in managing speakers and prepping session content for the Summit.

##### **2. Event Execution:**

- Provide guidance for on-site support needed for registration, AV needs, liaising with venue, and participant experience management.
- Coordinate and support Equity Fund staff in preparing event materials (e.g. the agenda, registration process, welcome bags, etc.).
- Provide run-of-show support at the in-person event alongside Equity Fund staff and partners, ensuring smooth execution.
- Make recommendations on tools, logistics planning, personnel, and any additional items to ensure smooth execution of the event. (ex: Conference application that syncs with Salesforce).
- Provide on-site support during the summit, ensuring smooth execution.

##### **3. Post-Event Deliverables:**

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- Lead the evaluation and debrief process, including the development and analysis of a participant survey for attendees and staff.
  - Prepare a final report summarizing staff and participant feedback and recommendations for future events.
4. **Ongoing Communication:**
- Plan and participate in regular meetings with the National Summit Planning Committee, with increasing frequency as the convening approaches.
  - Provide updates on progress-to-goals and budget to actuals on a monthly basis.
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### Equity Fund Responsibilities

The Equity Fund will:

- Provide necessary organizational background information and context.
  - Plan individual sessions (plenaries, workshops, breakout sessions, caucus spaces, flash talks, etc) for the Summit.
  - Communicate with attendees and participants.
  - Maintain regular communication with the consultant to manage project details and provide feedback.
  - Handle logistical arrangements, including the venue selection, travel, hotel accommodations, and meals.
  - Manage meeting logistics, including scheduling and the distribution of the necessary materials.
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### Proposal Submission Requirements

Interested candidates must submit the following by **April 30, 2025**:

1. **A summary of experience and qualifications** (max. 500 words)
2. **Examples of comparable events planned, including:**
  - A summary of the event(s), highlighting the consultant's role in design, organization, facilitation, and coordination (max. 500 words)
  - Event agendas
  - Post-event summary reports
  - Other relevant materials (e.g., photos, links, media coverage)
3. **A breakdown of estimated time and staff capacity required and proposed fees:**
  - Estimated hours/days needed to complete the work
  - Hourly or daily consulting fee
  - Proposed total fee cap for services
  - Reimbursable expenses cap

### **Submission Process**

Please submit all required documents via email by April 30, 2025 to:

- [sandra@theequityfund.org](mailto:sandra@theequityfund.org)
- [harrison@theequityfund.org](mailto:harrison@theequityfund.org)
- [shilpa@theequityfund.org](mailto:shilpa@theequityfund.org)

The subject line MUST reference: **“EQUITY FUND – 2026 GRANTEE SUMMIT CONSULTANT.”**

The Equity Fund is committed to fostering diversity and strongly encourages proposals from individuals of diverse backgrounds and experiences.

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We look forward to receiving your proposal!