



Opening doors to a better life

Washington State Housing Finance Commission

CONFERENCE PLANNING for AFFORDABLE HOUSING CONFERENCES

REQUEST FOR PROPOSALS 2026

**Deadline for submission:
Tuesday, June 30, 2026
5:00 p.m.
Prevailing Pacific Time**

Please email to:

**Anna Porkalob
Anna.Porkalob@wshfc.org
Washington State Housing Finance Commission
1000 Second Avenue, Suite #2700
Seattle, WA 98104-1046**

**WASHINGTON STATE HOUSING FINANCE COMMISSION
REQUEST FOR PROPOSALS**

**CONFERENCE PLANNING SERVICES
FOR AFFORDABLE HOUSING CONFERENCES**

INTRODUCTION AND BACKGROUND

ISSUING OFFICER

Anna Porkalob
Communications Strategist
1000 Second Avenue, Suite 2700
Seattle, Washington 98104-1046
(206) 513-5728
Anna.Porkalob@wshfc.org

PURPOSE

The Washington State Housing Finance Commission wishes to contract for conference planning services with a qualified, creative, and experienced business organization to organize, promote, plan, manage, and execute affordable housing conferences, in particular the annual Housing Washington conference (www.housingwa.org).

COMMISSION COMMITMENT TO PROMOTING RACIAL EQUITY:

The Washington State Housing Finance Commission has committed to racial equity as a lens through which all programs and initiatives will be assessed. This will apply to all aspects of *Housing Washington* conferences.

TIME PERIOD

The Commission expects the contract period for this contract to be **two years** from the start date of the contract.

CONTRACT AMOUNT

Services will be performed on a time and material basis at hourly rates or on agreed upon project costs, as authorized.

TIME SCHEDULE FOR COMPLETION OF THIS RFP

RFP Released:	Tuesday, May 19
Bidders Conference:	Thursday, May 28
First Q&A Posted:	Week of June 1
Proposals Due:	Tuesday, June 30
Announcement of Successful Bidders	Week of July 27
Contractor Interviews start:	Week of August 3
Notification of winning firm(s):	Week of August 24
Debriefing period:	August 31 to September 4
Anticipated Contract(s) Start Date:	November 1

Interviews may be conducted at the Commission’s discretion, and a final decision may be based solely on submitted proposals.

Interested parties must submit their proposals no later than 5:00 p.m. Prevailing Pacific Time on **Tuesday, June 30, 2026**, via email to: Anna.Porkalob@wshfc.org

The Commission reserves the right to modify the time schedule, including extending the proposal due date.

QUESTIONS AND ANSWERS

The bidders conference will be the first opportunity for potential bidders to ask questions in real time regarding this procurement. Questions can be sent beforehand as well. All questions regarding this RFP may be submitted via email to Anna.Porkalob@wshfc.org. All questions and responses will be posted on the wshfc.org website for all potential bidders to see. The online document will be updated regularly as new questions are submitted.

PROPOSAL SUBMISSION

If your organization is interested in working with the Commission as a conference planning consultant, please submit a proposal electronically to the Commission by **5:00 PM Prevailing Pacific Time, on or before Tuesday, June 30, 2026**, to: Anna.Porkalob@wshfc.org.

***ALL MATERIALS MUST BE SUBMITTED VIA EMAIL
NO FACSIMILE (FAX) TRANSMITTED PROPOSALS WILL BE ACCEPTED.***

Late Submissions: A proposal shall be considered late if received at any time after 5:00 p.m., Prevailing Pacific Time, **Tuesday, June 30, 2026**. Proposals received after the specified time WILL NOT be given further consideration.

Prior to the date and time designated for receipt of proposals, any proposal may be modified or withdrawn by email notice to Anna.Porkalob@wshfc.org. Such notice shall be delivered on or before the date and time set for receipt of proposals.

As of the date of this request and except as provided in this paragraph, there shall be no ex parte communication with Commissioners, staff, or others participating in the selection process except as set forth below in this paragraph. Any such ex parte communications shall be grounds for disqualifying the Proposer. All communications concerning the selection process should be addressed to Anna Porkalob, Communications Strategist, Washington State Housing Finance, Anna.Porkalob@wshfc.org.

By submitting a proposal, Proposers agree that they waive any claim against the Commission, the State of Washington, and their respective officers, employees, and agents for the recovery of any costs or expenses incurred in preparing and submitting a proposal or participating in an interview, if required.

COMMISSION BACKGROUND

Washington State Housing Finance Commission (the Commission) is a publicly accountable, self-supporting team dedicated to increasing racially equitable housing access and affordability and to expanding the availability of quality community services for the people of Washington.

The Commission uses no state tax revenues. It serves as a financial conduit connecting private lenders, public funders, developers, real estate professionals, first-time homebuyers and nonprofit organizations to:

- Create affordable rental housing and privately owned housing throughout the state
- Assist nonprofit organizations to build facilities to house people or provide a broad spectrum of important human services
- Promote homeownership
- Encourage community development and community services
- Impact economic stimulus through vital programs

HOUSING WASHINGTON CONFERENCE PROJECT DESCRIPTION

The Housing Washington conference (www.housingwa.org), held every year since 1994, is presented by the Commission in partnership with the Washington State Department of Commerce and the Low Income Housing Alliance. Ordinarily alternating each year east and west side locations (Spokane and Tacoma/Bellevue), During the COVID-19 pandemic the conference was held virtually. In 2021, Housing Washington attracted more than 1,200 attendees. In 2022 Housing Washington returned to an in person event.

The vision of this conference is to be Washington state's most significant resource for affordable housing guidance, innovation, and solutions. Its mission is to enhance the skills, vision, and

understanding of professionals working in affordable housing in Washington state and challenge them to work toward racial equity and social justice. Housing Washington is also nationally recognized for contributions in the affordable housing arena.

The conference is overseen by Housing Finance Commission executive leadership, with the contract and project management under the direction of designated staff. A committee composed of other Commission staff along with staff from our cosponsoring organizations, the Department of Commerce and the Low-Income Housing Alliance, typically meets early each year to set the conference agenda and select sessions, keynote speakers and other content.

Team Values

- Dedication to excellence in logistics and event delivery, creating a smooth and professional experience for all participants.
- Adaptability and resilience to respond effectively to evolving needs, whether the event is in-person or virtual.
- Commitment to meaningful engagement through dynamic content and interactive opportunities that foster connections and dialogue.
- Accountability and transparency in decision-making and execution, ensuring alignment with organizational goals and stakeholder expectations.
- Upholding professional integrity by maintaining high standards of quality and ethical practices throughout the project.
- Continuous improvement by reflecting on past planning and conferences to refine and enhance future planning and events.
- Commitment to clear and timely communication

Conference Values

- Commitment to inclusivity, social justice, and anti-racism in every aspect of the conference.
- Unique presentations and information not widely available online.
- Sharing new tools and programs specifically designed to make attendees more effective in their daily work and long-term planning.
- Dynamic presenters who effectively deliver concepts both visually and auditorily.
- Providing a platform for experts to share their good work and enhance our attendees' knowledge.
- Meaningful dialogue on timely issues affecting the housing industry as well as the communities of Washington state.
- Inspiring housing professionals with new ideas and connections to others.

Overall Conference Objectives

- Design and deliver effective presentations that focus on new programs, opportunities, and services that enhance our attendees' ability to execute their organization or agency's goals.
- Seek well-respected plenary speakers who excite and ignite our attendees, and who are first-time presenters to the majority of our attendees.
- Ensure presenters and speakers reflect racial, gender and other kinds of diversity regardless of topic.

- Present topics that challenge our industry to reflect on our past contribution to inequality in our state and take responsibility for addressing it.
- Provide outstanding gatherings that enhance networking and interaction among our attendees, providing a unique annual connection opportunity with leaders, peers, and colleagues.
- Expertly execute the logistics of the conference to present a seamless conference experience, whether the conference is in-person or virtual.
- Allow conference sponsors to position themselves as leaders in affordable housing and valued resources in the industry.
- Design each session to deliver best practices, new directions, and new actionable policies that enable attendees to grow, be enlightened, and be inspired.
- Overlay inclusion in every aspect of the conference resulting in an understanding and appreciation by all attendees to the rights, respect, and contributions of everyone involved.
- Present high-profile keynote/plenary speakers that typically would not be available to attendees via live presentations.

DELIVERABLES

The following is a list of tasks for which the consultant may be responsible. Please format your proposal to include each of the tasks/services identified. The Commission reserves the right to perform identified tasks in-house or through specifically identified contractors. Those chosen to provide conference-planning services will work with a planning team which will include identified Commission staff as well as representatives of Commerce and the Alliance to develop a theme and a conceptual plan for the event.

1. Conference Planning & Project Management

- Develop the overall direction and strategy for the conference, including concept development and future strategies.
- Provide project management of the conference, including oversight of the steering committee and coordination with the Commission’s project manager. Project management expectations include and not limited to:
 - Using centralized document sharing and collaboration tools such as Smartsheet, SharePoint, and shared calendar
 - Working with Commission’s project manager to develop agendas for steering committee meetings
 - Developing timelines for deliverables
 - Maintaining comprehensive documentation of all planning and execution activities via Smartsheet. Facilitate “track teams” to determine session content for subject-area tracks and coordinate plenary content review.
- Integrate and manage Ending Homelessness Tracks, including cross-marketing, content coordination, communications, and on-site logistics.
- Recommend options for strategic direction of the conference from year to year, as well as creative tactics to increase the value of the conference to the affordable housing constituent groups that the Commission partners with and serves.

- Maintain comprehensive documentation of all planning and execution activities via Smartsheet.

2. Budget & Financial Management

- Assist in developing and managing the conference budget, including adherence to client's internal finance protocols.
- Prepare and deliver financial reports on conference income and expenses.
- Work with the client on overall conference finances and provide all conference records and assets (historical and current), primarily electronically.

3. Sponsorship & Exhibitor Management

- Secure sponsors and exhibitors, working with partner organizations and presenter staff teams to identify and coordinate sponsorship leads.
- Work with partners to complete grant applications if needed.
- Provide strategic recommendations and initiate opportunities to grow sponsor/exhibitor revenue and enhance sponsor value and engagement.
- Manage sponsor visibility, marketing, expo opportunities, and ensure sponsor recognition.
- Facilitate relationship-building between the Commission and sponsors, providing a complete sponsor list with contact information and sponsorship levels.
- Coordinate and manage all aspects of exhibitor participation, including logistics, set-up, and move-in/move-out with host facilities or decorator service companies.

4. Speaker & Content Management

- Research, negotiate, and contract national and regional speakers and subject experts within the speaker budget.
- Provide comprehensive speaker management, including travel/hotel arrangements, audiovisual coordination, communication systems, master roster tracking, risk planning, replacements, welcome packets, thank-you letters, and invoice payment processing.
- Coordinate speaker and track team communications, including detailed planning sheets and post-conference follow-up.
- Support dignitaries at the conference, including podium materials, scripting, and introductions.

5. Marketing, Communications & Branding

- Manage the conference website (www.housingwa.org), social media channels, and Whova event app.
- Develop and execute marketing efforts to reach existing and new/underserved audiences statewide, reporting on outreach results.
- Provided marketing assets as needed to support the conference presenter and partners as conference ambassadors.
- Manage the conference's brand identity and voice; create and distribute digital/printed materials to support marketing and communications needs.

6. Registration & Attendee Services

- Manage all aspects of registration and communications, including online registration, coupon codes, confirmations, payments, invoicing, refunds, cancellations, and transfers.
- Oversee scholarship awardee services, including communications, registration, travel/hotel arrangements, and coordination of cancellations/replacements (client selects awardees and manages reimbursements).
- Oversee Friend of Housing awardee services, including logistics-related communications, registration, travel/hotel arrangements, and coordination of cancellations.

7. Event Logistics & Operations

- Coordinate and manage all aspects of the Welcome Reception, Friend of Housing Award activities, and other related events, covering logistics such as facility management, A/V services, signage, facilitators, meeting room assignments, set-up, menus, exhibits, décor, and accessibility.
- Plan and coordinate all necessary subcontractors and services for secure virtual elements, including session logistics, access coordination, and session recordings (with at least four months advance notice for virtual elements).
- Monitor and track sponsor special events to avoid scheduling conflicts and consult on off-site meetings as needed.
- Store conference related assets such as display pieces and other materials when not in use.

8. Venue & Vendor Management

- Research, negotiate, and advise on facility contracts for 2026 and 2027 conference sites, including hotel meeting rooms and accommodations. Present options, secure contracts upon client approval, and manage all related vendor relationships.
- Work directly with the project manager on contract negotiation and execution for all conference-related services.

9. Evaluation & Reporting

- Conduct electronic surveys of attendees to evaluate the conference, keynote addresses, breakout sessions, and learning labs.
- Draft and deliver a comprehensive conference summary report, including analysis of all aspects of the event.

10. Client Communication & Strategic Integration

- Sustain a high level of client contact to ensure responsiveness, meet internal reporting requirements, and align conference activities with the Commission's broader strategic goals.
- Recommend strategic options and creative tactics to increase conference value for affordable housing stakeholders.

11. Accessibility & Inclusive Experience

- Provide expertise to ensure the conference is accessible and inclusive for participants with a wide range of physical, sensory, cognitive, and neurological needs, following federal requirements and thinking creatively.
- Oversee accessibility compliance for the Housing WA conference and ensure that all conference websites, mobile apps, registration, payments, schedules, videos, and digital documents conform to WCAG 2.1 Level AA requirements, including keyboard and screen reader access and captions. Contractors will document any permitted exceptions.
- Advise the project manager on accessibility standards and best practices throughout conference planning and execution.
- Develop and manage a process for collecting and coordinating attendee accessibility needs during registration, including interpretation, captioning, dietary needs, mobility accommodations, and sensory considerations.
- Coordinate accessibility services and vendors as needed, including captioning (CART), ASL interpretation, assistive listening devices, accessible seating, and quiet spaces. Review conference materials and speaker presentations in advance to ensure accessibility standards are met, including accessible slide design and inclusive presentation practices.
- Collaborate with the venue and vendors to ensure physical accessibility, clear wayfinding, and inclusive meeting environments.
- Provide on-site accessibility coordination and recommend improvements for future conferences.

EXPECTED RESULTS UNDER THE CONTRACT

The Commission expects to receive the following deliverable results from the selected contractor within the time frame of the contract:

1. The provision of professional services by qualified personnel to successfully achieve the tasks cited above.
2. A professional, positive and cooperative working relationship.
3. All documents, electronic production, copy, design, logos, graphic icons, and/or subsequent products become the exclusive property of the Commission, without qualification.

TERM OF THE CONTRACT

The term of the contract will be from November 1, 2026, through December 31, 2028. The Commission reserves the right to extend the contract for up to two additional two-year periods at the sole discretion of the Commission. The Commission reserves the right to terminate the contract on 30 days' notice to the contractors.

COMMISSION SUPPORT FOR THE SELECTED CONTRACTOR

The Commission’s conference project manager will coordinate the work of the contractor with the Commission staff and other persons as required for the completion of the contract, act as chair of the planning team; act as point of contact for the contractor. The contract owner manages the contractor's performance and budget process annually.

MINIMUM QUALIFICATIONS

- The Contractor must be licensed to do business in the state of Washington.
- The Contractor must have at least 10 years of experience in conference or event planning and/or related experience.
- The contractor must have at least 10 years of experience with budget development and adherence, budget impact analysis, and overall responsibility for budgets and finances.

COMMITMENT TO RACIAL EQUITY

The Commission has made a commitment to become an anti-racist organization and will promote racial equity throughout its programs. Minority owned businesses are encouraged to apply.

INTENT TO ENTER INTO ONE CONTRACT

The contract contemplated as a result of this RFP will be between the Washington State Housing Finance Commission and one contractor only. Utilization of subcontractors and monitoring of their performance will be the responsibility of the contractor. Prior to the submission of the proposal, the Commission must approve any joint venture or sub-account. Any firm may be utilized for subcontracting or joint venturing purposes on more than one proposal.

RFP COORDINATOR

The RFP Coordinator is the sole point of contact with the Commission for this procurement. All communication between the Consultant and the Commission upon receipt of this RFP shall be with the RFP Coordinator, as follows:

Name	Anna Porkalob
Address	1000 Second Avenue, Suite 2700
City, State, Zip Code	Seattle, Washington 98104-1046
Phone Number	206-513-5728
E-Mail Address	Anna.Porkalob@wshfc.org

Any other communication will be considered unofficial and non-binding on the Commission. Consultants are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Consultant.

PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

All proposals will become the property of the Commission and will not be returned to the proposer.

All proposals received shall remain confidential until the contract is issued. If any contract resulting from this RFP is signed by the Executive Director of the Commission and the apparent successful Contractor, the proposals shall be deemed public records as defined in RCW 42.17.250 to 42.17.340, "Public Records."

Any information in the proposal that the Consultant desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.17.250 to 42.17.340 must be clearly designated. The page must be identified and the particular exception from disclosure upon which the Consultant is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right-hand corner of the page.

The Commission will consider a Consultant's request for exemption from disclosure; however, the AGENCY will make a decision predicated upon Chapter 42.17 RCW and Chapter 143-06 of the Washington Administrative Code. Marking the entire proposal exempt from disclosure will not be honored. The Consultant must be reasonable in designating information as confidential. If any information is marked as proprietary in the proposal, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping, as outlined in RCW 42.17.300. No fee shall be charged for inspection of contract files, but twenty-four (24) hours notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

METHOD AND SCHEDULE OF CONTRACT PAYMENT

The selected contractor will be paid for completion of contract work per an established schedule and completion of specified tasks as outlined in the proposal and final contract. The selected contractor will submit a request for payment on the form and in the manner to be specified by the Commission in accordance with established requirements. For final payment the Commission reserves the right to withhold not less than 20 percent of the contract amount until all work is completed to the Commission's satisfaction.

REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be provided via Washington State's WEBS system and by e-mail to all who were sent the RFP directly. The Commission also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

CRITERIA FOR EVALUATING PROPOSALS

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals will be accomplished by an

evaluation team to be designated by the Commission, which will determine the ranking of the proposals. The Commission, at its sole discretion, may elect to select consultants as finalists for an oral interview.

The Commission will determine which proposal is the most responsive to the requirements of the RFP. The brevity and clarity of Sections I, II and III of the proposal as required in this RFP will be considered.

Considerations will be qualifications/experience, approach, schedule, responsiveness, references and entire written proposal.

The Commission reserves the right to award this contract to the consultant which will best meet the requirements of the RFP, and not necessarily to the consultant with the lowest bid. The experience and background of staff actually assigned to the project and previous successful experience will be important considerations.

REJECTION OF PROPOSALS

The Commission reserves the right to reject any or all proposals prior to execution of the contract, with no penalty to the Commission. Respondents who have been selected for an interview will be notified of the decision after the selection of the contractor.

ORAL INTERVIEWS MAY BE REQUIRED

Written submittals and oral interviews, if considered necessary, will be utilized in selecting the winning proposal. The Commission, at its sole discretion, may elect to select the top scoring finalists from the written evaluation for an oral presentation. The oral presentation will determine the apparently successful proposer. Commitments made by a consultant at the oral interview, if any, will be considered binding.

COSTS TO PROPOSE

The Commission will not be liable for any costs incurred by the Consultant in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

NOTIFICATION TO CONSULTANTS

Consultants whose proposals have not been selected for further consideration will be notified via telephone or e-mail.

DEBRIEFING OF UNSUCCESSFUL CONSULTANTS

Only consultants who have submitted a proposal under the criteria established by the Commission may protest the rejection of a proposal and request a debriefing. Upon request a debriefing will be scheduled with an unsuccessful consultant. The request for a debriefing must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Bidder is e-mailed to the bidder. The debriefing must be held within three (3) business days of the request.

Discussion will be limited to a critique of the requesting consultant's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

PROTEST PROCEDURE

This procedure is available to consultants who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the consultant is allowed three (3) business days to file a protest of the solicitation with the RFP Coordinator. Protests must be submitted by email and must be followed by the original document. Bidders protesting this solicitation must follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to bidders under this solicitation. All protests must be in writing and signed by the protesting party or authorized Agent. The protest must state the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested must also be included. All protests will be addressed to the RFP Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of an evaluator.
- Errors in computing the score.
- Non-compliance with procedures described in the procurement document or Commission policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address such issues as: (1) an evaluator's professional judgment on the quality of the proposal, or (2) the Commission's assessment of its own and/or other agencies needs or requirements.

Upon receipt of a protest, a protest review will be held by the Commission. The Director of the Commission or an employee delegated by the Director who was not involved in the procurement will consider the record and all facts available and issue a decision within five (5) business days of receipt of the protest unless additional time is required, in which case the protesting party will be notified by the Commission.

In the event a protest may affect the interest of another consultant that submitted a proposal, such consultant will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold the Commission's action; or
- Find only technical or harmless errors in the Commission's solicitation process and determine the Commission to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide the Commission options which may include:
 1. Correct the errors and re-evaluate all proposals and/or

2. Reissue the solicitation document and begin a new process, or
3. Make other findings and determine other courses of action as appropriate.

If the Commission determines that the protest was without merit, the Commission will enter into a contract with the apparently successful contractor. If the protest is determined to have merit one of the alternatives noted in the preceding paragraph will be taken.

SCHEDULE

RFP Released:	Tuesday, May 19
Bidders Conference:	Thursday, May 28
First Q&A Posted:	Week of June 1
Proposals Due:	Tuesday, June 30
Announcement of Successful Bidders	Week of July 27
Contractor Interviews start:	Week of August 3
Notification of winning firm(s):	Week of August 24
Debriefing period:	August 31 to September 4
Anticipated Contract(s) Start Date:	November 1

INSTRUCTIONS FOR SUBMITTING PROPOSALS

The proposal must be submitted by 5 p.m. Prevailing Pacific Time on Tuesday, June 30, 2026, to Anna.Porkalob@wshfc.org

Late proposals will not be considered.

PROPOSAL FORMAT

All submitted proposals will be in a Times New Roman using a 12-point font and limited to 12 pages.

Proposals must be organized into the following three sections:

Section I: A **cover letter** containing the following information:

- A. Name of the legal entity with whom the contract is to be written.
- B. Names of the legal entities to be used as subcontractors (if applicable).
- C. Name, address and telephone number of the principal officer of the contractor and subcontractor (if applicable).
- D. The legal status of the organization (contractor and subcontractors).

- E. Federal Employer tax identification number for contractor and subcontractor(s) and the OMWBE identification number for any minority or women-owned firms.
- F. Washington state tax registration number (contractor and subcontractors).
- G. If contractor or subcontractor were engaged by the State of Washington within the past 24 months, indicate the contract number and/or any other information available to identify the engagement.
- H. The location of the facility from which the contractor and subcontractors would operate.
- I. A list of individuals who will work on this contract.

Section II: Qualifications, Approach, Schedule and References

A. Approach and Methodology: Describe your specific approach and proposed work plan to accomplish the deliverables. Include information about your project management process and how you would ensure responsive collaboration and communication with the Commission and partners.

B. Schedule: Knowing that the 2027 conference will take place on October 5-7, describe your ability to meet the Commission's schedule. Include your timeline, indicating the amount of time you are estimating for each deliverable.

C. Firm Experience: Describe the experience and qualifications of your firm to successfully complete this work with specific reference to the qualification requirements of this solicitation. Include a description of the most comparable work performed during the past two years. Include your experience with virtual conference delivery, including specific platforms.

D. Staff Qualifications: Provide a description of individual personnel assigned to the contract. Include for each person:

- Name, position description.
- Starting date of employment with the firm and the proposed time percentage that would be spent on this contract.
- Expertise and relevant skills, etc.
- Past success with similar projects

The bidder must commit that the individuals in the proposal will perform the contracted services.

F. References. List names, addresses, telephone numbers, and e-mail addresses of three business references for which **comparable work has been performed within the past three years**. For each reference, include a brief description of the type of service provided. The consultant and staff proposed to provide the services must grant the Commission permission to

contact references, and others, who may have pertinent information. References may be contacted for the top scoring proposal(s) only.

Section III:

Service Costs

Provide proposed cost of the contract in the following format:

- A maximum dollar amount for each service under this proposed contract including a not-to-exceed total dollar amount for provision of services under this proposed contract.
- A breakdown of the estimated hours each person assigned to the project will work and the hourly rate assigned to each person.

ADDITIONAL MATERIAL

Proposers may include any other relevant information that would be helpful to the Commission in evaluating your firm's qualifications in a fourth section, if desired.

BREVITY AND CLARITY OF PROPOSALS

The brevity and clarity of Sections I, II, and III of the proposal will be considered in the selection of the contractor.

CONTRACT GENERAL TERMS AND CONDITIONS

The successful applicant will be expected to enter into a contract generated by the Commission in accordance with guidelines provided by the State of Washington, including its general terms and conditions and other standard provisions customary to such contractual agreements. In no event is the applicant to submit its own standard terms and conditions in response to this procurement. The applicant may submit exceptions to the general terms and conditions. The Commission will review requested exceptions and accept or reject the same in its sole discretion.

Insurance Coverage

The selected contractor is to furnish the Commission with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The contractor shall, at its own expense, obtain and keep in force insurance coverage that shall be maintained in full force and effect during the term of the contract. The contractor shall furnish evidence in the form of a Certificate of Insurance that insurance has been provided, and a copy shall be forwarded to the Commission within fifteen (15) days of the contract effective date.

Liability Insurance

Contractor shall maintain commercial general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the "each occurrence" limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the "each occurrence" limit. All insurance shall cover liability assumed

under an insured contract (including the tort liability of another assumed in a business contract) and contain separation of insured's (cross liability) condition.

Additionally, the contractor is responsible for ensuring that any sub-contractors provide adequate insurance coverage for the activities arising out of subcontracts. In the event that services delivered pursuant to this contract involve the use of vehicles, either owned or unowned by the contractor, automobile liability insurance shall be required. The minimum limit for automobile liability is \$1,000,000 per occurrence, using a Combined Single Limit for bodily injury and property damage.

The insurance required shall be issued by an insurance company/ies authorized to do business within the state of Washington, and shall name the state of Washington, its agents and employees as additional insureds under the insurance policy/ies.

All policies shall be primary to any other valid and collectable insurance. Contractor shall instruct the insurers to give the Commission thirty (30) calendar days advance notice of any insurance cancellation.

Contractor shall submit to the Commission within fifteen (15) calendar days of the contract effective date, a certificate of insurance that outlines the coverage and limits defined in the Insurance section. Contractor shall submit renewal certificates as appropriate during the term of the contract.

Employers Liability ("Stop Gap") Insurance

In addition, the contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.

Additional Provisions

Above insurance policy shall include the following provisions:

1. **Additional Insured.** The Washington State Housing Finance Commission, its elected and appointed officials, agents, and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with the contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the Commission.
2. **Cancellation.** Washington State Housing Finance Commission shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give the State forty-five (45) days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the State shall be given ten (10) days advance notice of cancellation. Insurers subject to 48.15 RCW (Surplus lines): The State shall be given twenty (20) days advance notice of cancellation. If cancellation is due to non-payment of premium, the State shall be given ten (10) days advance notice of cancellation.

3. Identification. Policy must reference the State's contract number and the agency name.
4. Insurance Carrier Rating. All insurance and bonds should be issued by companies admitted to do business within the state of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best's Reports. Any exception shall be reviewed and approved by Washington State Housing Finance Commission. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with Chapter 48.15 RCW and 284-15 WAC.
 4. Excess Coverage. By requiring insurance herein, the State does not represent that coverage and limits will be adequate to protect contractor, and such coverage and limits shall not limit contractor's liability under the indemnities and reimbursements granted to the State in this contract.

Worker's Compensation Coverage

The Contractor will at all times comply with all applicable workers' compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable.