

Finance, Talent and Technology Management Forum

RFP Guidelines

IMPORTANT DATES:

Wednesday, March 1: RFP Opens

Friday, April 14: RFP Closes

October 2-4: Finance, Talent and Technology Management Forum *in Dallas, Texas*

In the spirit of peer-to-peer learning and sharing across the United Way Network, all finance, talent and technology management leaders are invited to submit learning session proposal(s) for the Finance, Talent and Technology Management Forum.

We are looking for proposals that will highlight best practices, strategies, tools and programs implemented in your United Way that make a positive difference and can be leveraged by all of our colleagues and peers across our Network. The proposal submission site is open from **March 1 – April 14, 2017**. You may submit more than one proposal by submitting multiple forms. The link to the proposal submission site can be found below.

Proposals are welcome from academia, business leaders, experts and thought leaders, government, nonprofits and United Way staff.

Selection Criteria

In addition to great content, we encourage innovative and effective ways to deliver learning and to create an experience that will promote interaction and engagement of the participants. Proposed will be evaluated on the following:

- Relevance to improving business results
- Innovative trends and best practices
- Degree to which content addresses BOTH best/promising practices AND what didn't work (i.e. failures and areas for improvement)
- Level of experience/expertise of presenters
- Practical, on-the-job application of materials with tools and templates
- Overall proposal quality and completeness
- Proof of Performance documentation

Preference will be given to proposals that:

- Demonstrate innovation in approach and strategy
- Link to actual work in an organization vs. theoretical or academic content
- Include research and/or data to support
- Feature concrete and easily implemented "how-to" information, tools or resources for attendees as an immediate take-away
- Highlight how various size staff organizations can leverage the ideas
- Demonstrate performance improvements in the session's selected topic areas

Speaker Requirements:

Once accepted, all speakers must:

- Commit to the presentation of a program at designated times during the Forum in Dallas, TX
- Participate in an online briefing that will cover the flow and structure of sessions, audience expectations of facilitators and audience expectations of materials and engagement techniques
- Grant permission for hard copy and online distribution of presentation materials
- Submit all materials and presentations through the RFP portal

Questions about the RFP process? **Please email:** FTTMFRFP@unitedway.org