

National Energy and Utility Affordability Coalition

Event Contractor Performance Appraisal

Contractor Name: _____ **Project:** _____

Contract Start/End Dates: From _____ To _____

Review Period: From _____ To _____

Purpose: The purpose of conducting the Performance Appraisal is to develop better communication between the contractor and NEUAC; enhance event operations; improve transparency; and encourage continued professional development, cooperation, and open lines of communication between parties.

Performance Rating Categories: Consider the contractor's performance in each category and designate the appropriate rating. The following is a description of each level of performance:

5. Outstanding — Consistently exceeds expectations for responsibilities and objectives, skills, and commitment required for the job. Possesses superior knowledge of major aspects of the total job and has extensive experience in each area.

4. Exceeds Expectations/Requirements — Frequently exceeds expectations for responsibilities and objectives, skills, and knowledge. Sought to enhance or increase skills, made recommendations/offered possible solutions to improve processes.

3. Meets Expectations / Requirements — Meets established expectations for responsibilities and objectives of the position. Demonstrates requisite skills, knowledge, and commitment.

2. Improvement Needed — Does not always meet the responsibilities and objectives of the job. Demonstrates some of the requisite skills and knowledge to perform the job, but additional training and or commitment is required. Individual may still be learning the job and/or willingness to develop or improve requisite skills, knowledge maybe in question.

1. Unsatisfactory Job Performance — Responsibilities of the position **have not been met.** Does not demonstrate the necessary knowledge, skills, or commitment required.

Percentages of effort should collectively equal 100% for onsite/virtual events.

Overall Project Management

[percentage of effort spent these duties (onsite event) _____% (virtual event) _____% (for self-evaluation only by contractor)]

Outstanding Exceeds Expectations Meets Expectations Improvement Needed Unsatisfactory

Oversee full project management including coordination of all planning calls and distribute minutes. Ensure all information and all supporting parties remain on track in terms of planning timeline and deadlines. Participate in all planning calls and meetings. Creation and management of event schedules. Create and execute a communication plan. Schedule, coordinate, plan and execute logistical needs and rehearsals. Manage audio, technology support, photography/video, evaluations, shipping, signage, and venue/vendor management. Design and arrange for Signage for Conference. Provide Conference APP management. Coordinate event evaluation process. Promote accessibility for NEUAC attendees, including handicap accessibility considerations, promote considerations for different cultures and religious requirements when appropriate, accommodate for food sensitivities or allergies, and any other special needs of event guests.

Comments:

Site Selection and Contract Negotiations

[percentage of effort spent these duties (onsite event) ____% (virtual event) ____%] (for self-evaluation only by contractor)

- Outstanding Exceeds Expectations Meets Expectations Improvement Needed Unsatisfactory

Identify, research, and qualify a selection of facilities that can accommodate future programs. Complete site inspections at all qualifying facilities to ensure both a successful program as well as a safe environment to accommodate the attendees. Manage contract negotiations with the selected venue. Achieve the lowest possible room rates with minimal attrition. Maximize hotel concessions such as complimentary room nights, staff room rates, room upgrades, etc. Negotiate reduced or complimentary meeting rooms and hotel services, discounted food and beverage and AV needs, and best-price for technology.

Comments:

Budgeting and Financial

[percentage of effort spent these duties (onsite event) ____% (virtual event) ____%] (for self-evaluation only by contractor)

- Outstanding Exceeds Expectations Meets Expectations Improvement Needed Unsatisfactory

Adhere to the project budget(s) as established by NEUAC without cost overruns. Alert NEUAC when costs exceed expectations and offer alternative solutions. Utilize lowest-cost options for travel-related and other individual expenses. Seek out lowest-cost viable options for event-related expenses. Review all invoices related to the event for accuracy and reconcile in a timely manner, including any outstanding registration fees.

Comments:

Food & Beverage/Transportation Coordination

[percentage of effort spent these duties (onsite event) ____% (virtual event) ____%] (for self-evaluation only by contractor)

- Outstanding Exceeds Expectations Meets Expectations Improvement Needed Unsatisfactory

Work with venue and NEUAC representatives to select appropriate menus for the conference. Ensure menus selected are of the finest quality and best value. Coordinate F/B for all functions throughout the conference. Set up pre-event tastings or other previews. Manage airport or other transportation needs for events. Arrange motor coaches to and from the airport. Compile a manifest to arrange all transportation needs to the hotel as needed. Manage offsite venue transportation.

Comments:

Registration Services

[percentage of effort spent these duties (onsite event) ____% (virtual event) ____%] (for self-evaluation only by contractor)

- Outstanding Exceeds Expectations Meets Expectations Improvement Needed Unsatisfactory

Create a customized registration website including navigation pages to support the conference needs. Respond to email inquiries regarding registration or conference information within 24 hours or 4 hours for urgent matters for any request received during normal business hours. Generate and disseminate registration and other reports weekly/or as determined by NEUAC. Produce badges for all event participants with lanyards. Assist with the coordination of and ordering of all registration materials. Oversee shipping and delivery of all items to be included in attendee kits to ensure all items are available prior to registration, including bags, giveaways, gifts, handouts and any other necessary materials.

Comments:

Exhibitor Management

[percentage of effort spent these duties (onsite event) ____% (virtual event) ____%] (for self-evaluation only by contractor)

- Outstanding Exceeds Expectations Meets Expectations Improvement Needed Unsatisfactory

Coordinate exhibitors pre-event, during the event, and post-event. Ensure exhibitors are assigned appropriate spaces, have the logistical items required, receive a daily “check-in” during the conference to assess their needs and progress, and follow-up after the event. Share ideas to enhance the exhibitor experience with NEUAC representatives.

Comments:

Speaker Management

[percentage of effort spent these duties (onsite event) ____% (virtual event) ____%] (for self-evaluation only by contractor)

- Outstanding Exceeds Expectations Meets Expectations Improvement Needed Unsatisfactory

Coordinate speaker needs, requirements, set up requests, and rehearsal schedules. Manage calls for the planning team, speaker and session owner communication, distribute of guidelines for presentations (templates, etc.), coordinate speaker materials and/or AV requests. Coordinate and manage speaker registration. Manage and send all meeting requests for rehearsals and sessions. Ensure seamless communication to the speakers.

Comments:

On-Site (or Day-Of) Management and Staffing

[percentage of effort spent these duties (onsite event) ____% (virtual event) ____%] (for self-evaluation only by contractor)

- Outstanding Exceeds Expectations Meets Expectations Improvement Needed Unsatisfactory

Communicate effectively with hotel staff, NEUAC board representatives, NEUAC staff, speakers, and other stakeholders. Implement the conference plan, including organizing and managing all associated logistics for the event. Accommodate the unexpected. Create and disseminate an event-specific playbook outlining all relevant tasks, contacts, and timelines; and update as necessary. One year in advance, create and disseminate an event-specific work-back schedule of conference deadlines and update as necessary.

Comments:

Reporting

[percentage of effort spent these duties (onsite event) ____% (virtual event) ____%] (for self-evaluation only by contractor)

- Outstanding Exceeds Expectations Meets Expectations Improvement Needed Unsatisfactory

Prepare a package of post-conference reports detailing registration data and overall conference performance, including areas of strength and areas needing improvement. Prepare registration reports by week with historical comparisons to previous conferences. Reports also may be requested to outline site selection options, food and beverage options, and other conference related data.

Comments:

Contractor Comments:

NEUAC Signature: _____

Date: _____

Print name and title: _____

Contractor Signature: _____

Date: _____

Print name and title: _____