



**From: Luke Ertle**

**Date: January 18, 2022**

**Request for Proposals: Conference Planner**

**Deadline: Friday, January 28, 2022**

The Association of Clinicians for the Underserved (ACU) is seeking an experienced conference planner to coordinate its 2022 Annual Conference and 25<sup>th</sup> Anniversary Gala.

ACU is a uniquely transdisciplinary membership network uniting clinicians, advocates, and organizations in the shared mission to improve health equity for the underserved. ACU provides professional education, training, technical assistance, and clinical tools and programs to thousands of clinicians and organizations every year. ACU's mission is to improve the health of America's underserved populations and to enhance the development and support of the clinicians who serve them.

ACU's Annual Conference brings together hundreds of healthcare providers, administrators, advocates, and others to share and learn best practices in delivering health care to underserved populations. The conference will be a hybrid event including both an in-person component at the Mandarin Oriental in Washington, D.C. and a virtual component held through Cvent. The conference planner is responsible for the overall planning and execution of ACU's annual conference and gala which includes:

- A preconference training on July 31<sup>st</sup>
- The main conference and gala on August 1<sup>st</sup>-2<sup>nd</sup> which will consist of:
  - Up to 5 general sessions that will be live streamed
  - Up to 24 educational sessions, 6 of which will be live streamed
  - Up to 16 poster presentations, both in-person and recorded
  - An expo hall with both in-person and virtual options
  - In-person and virtual networking opportunities
  - A gala on the evening of August 1<sup>st</sup>
- An advocacy-related function (e.g.-a "hill day", training, etc.) on August 3<sup>rd</sup>.

## **Scope of Work:**

### *Deliverable 1: Conference Planning*

The conference planner will work closely with ACU staff and other vendors to ensure its success. The conference planner will:

- Organize at a minimum bi-weekly conference planning meetings including creating agendas, drafting and sharing notes, determining frequency of meetings, and sending meeting invitations.
- Build out and update the conference registration and speaker portals including the conference webpage, using a third-party platform such as Cvent.
- Track registration including accounts payable & receivable providing periodic reports to ACU conference planning team.
- Build out the virtual conference platform where the online content (general sessions, workshops, poster presentations, virtual exhibitor booths, games, etc.) will be delivered to attendees.
- Coordinate with speakers/presenters, exhibitors/sponsors, and other vendors to deliver the content.
- Coordinate with ACU's Executive Director around prepping keynote speakers including registration and on-site logistics.
- Manage all aspects of the conference programming including the call for workshop and poster proposals, the selection process for workshops and poster proposals, planning the conference schedule, and communication with speakers/presenters.
- Create and implement safety measures related to COVID-19 including creating registration waivers and on-site protocols, if warranted.
- Coordinate with ACU's Program Director to engage ACU committee members in the conference workshop and poster selections as well as scheduling of selected workshops.
- Manage all aspects of conference evaluation including session evaluations, overall conference evaluation, and sharing of evaluation results.
- Communicate with attendees/speakers/presenters/exhibitors/sponsors through the online portal before, during, and after the conference which will include drafting and sending emails and push notifications.
- Manage continuing education (CE) credits including submitting the application, sharing appropriate verbiage on the website and/or conference communications, tracking of CE requirements, and sending certificates to attendees.
- Prepare requests for bids for graphic design, signage, A/V, transportation, and other conference needs.
- Manage the process for identifying and selecting annual conference awards including creating the nomination form, sharing nominations with the ACU conference planning team, purchasing awards, notifying awardees, and liaising with awardees around logistics.

- Create all conference materials including the conference program, housekeeping/scrolling slide decks, badges, tent cards, poster presentation collateral, ribbons, raffle tickets, etc.
- Create scrolling slide decks for general sessions.
- Create housekeeping slides for all educational sessions.
- Create and manage an inventory of all conference materials to be printed and shipped ensuring their timely delivery to the conference venue.
- Manage logistics of the in-person conference with hotel staff including room assignments and design, food & beverage, and more.
- Manage other on-site vendors including photographers, A/V, and transportation.
- Create a process and materials for poster judging and liaise with poster judges.
- Address onsite needs of speakers/presenters, exhibitors/sponsors, and other vendors.
- Oversee and manage vendors coordinating the virtual component of the event including any live streams.
- Coordinate with ACU's Executive Director to identify prizes and a process for selecting prize winners.
- Liaise with ACU staff around the planning and execution of the pre-conference training on July 31<sup>st</sup> and the advocacy function on August 3<sup>rd</sup>.
- Train and prepare ACU employees to staff the conference which will creating staffing plans and training materials, scheduling and holding training meetings, and addressing onsite needs of staff.
- Identify, recruit, and onboard volunteers to staff the conference.

#### ***Deliverable 2: Gala Planning***

The conference planner will work closely ACU's Executive Director to plan and execute the conference gala. The conference planner will:

- Organize bi-weekly gala planning meetings (separate from the conference planning meetings) which includes creating agendas, drafting and sharing notes, determining frequency of meetings, and sending meeting invitations.
- Manage gala registration through Cvent and track accounts payable & receivable.
- Liaise with ACU's Executive Director around gala sponsorship.
- Coordinate with the venue staff around room design, food & beverage, and other on-site needs.
- Create a staffing plan and orient ACU staff on roles.
- Create and manage an inventory of all gala materials to be printed and shipped ensuring their timely delivery to the venue.
- Liaise with speakers and award recipients around gala logistics.

## **Time Requirements:**

The selected conference planner will need to be available on-site for all conference-related functions from July 31<sup>st</sup> until August 3<sup>rd</sup> which includes the gala on the evening of August 1<sup>st</sup>. Furthermore, the conference planner will need to be available for regular bi-weekly conference planning meetings as well as separate bi-weekly planning meetings around the gala. All other planning duties described above can be done around the conference planner's schedule and in coordination with other vendors or ACU staff.

## **Job Requirements:**

The selected conference planner must demonstrate:

- Proven success as an event planner or coordinator.
- Strong interpersonal and communication skills.
- Experience in maintaining and building enriching business relationships.
- Excellent organizational skills, including multitasking, time management, and meticulous attention to detail.
- Proficiency with Cvent as well as Attendee Hub or another similar platform.
- The ability to handle pressure and make split-second decisions.
- Located in the DC-metro area.

## **Timeline**

The conference planner must submit the following content to Luke Ertle, Program Director, at [ertle@clinicians.org](mailto:ertle@clinicians.org) no later than **January 28, 2021**:

- Resume (Max: 2 pages)
- Cover letter (Max: 2 pages)
- Materials that demonstrate experience managing conferences:
  - A sample conference program
  - Examples of creating an engaging, online experience for attendees (e.g.-screenshots, summary, FAQs, etc.)
  - A post-conference evaluation (e.g.—written report or presentation)
- Budget:
  - Provide your required compensation amount. We anticipate that approximately 300-350 hours will be required over the course of the project. ACU can dedicate a maximum commitment of up to \$25,000 for compensation.

All applicants will be notified of decision by Wednesday, February 2<sup>nd</sup>. ACU will hold a meeting with the selected conference planner no later than Friday, February 4<sup>th</sup>.

**Questions?** Please contact Luke Ertle at [ertle@clinicians.org](mailto:ertle@clinicians.org).