

Funding Opportunity to Manage the 2024 CIRM Annual Trainee Network Conference

EDUC 1.12



REQUEST FOR APPLICATIONS

07.31.23 (revised 08.23.23)



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Funding Opportunity to Manage the 2024 CIRM Annual Trainee Network Conference

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Objective

The mission of the California Institute for Regenerative Medicine (CIRM) is to accelerate world class science to deliver transformative regenerative medicine treatments in an equitable manner to a diverse California and world.

The objective of this request for applications (RFA) is to solicit a highly qualified applicant to help develop and manage an Annual Trainee Network Conference in support of CIRM's Research Training grant (EDUC) Programs, to take place between May and August of 2024, with a preference for June-July, excluding July 9-13.

Award Information

What CIRM Education (EDUC) Programs are included in this Trainee Network Conference?

Key to the achievement of CIRM's mission is the creation of a diverse and skilled work force that can tackle the scientific challenges of today and deliver the innovative solutions of tomorrow. To this end, CIRM supports a series of Education programs (EDUC Grants) that provide specialized coursework and laboratory research experiences for students and trainees of various levels around the state of California. Each year, several hundred individuals complete their formal training and progress to new opportunities that may include further education or immediate employment in biomedical related fields. The Trainee Network Conference serves as a culminating event to showcase the achievements of these trainees, and to promote their professional development through peer-to-peer networking and other organized activities.



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A summary and description of CIRM's EDUC programs are provided below.

Bridges (EDUC2): The Bridges program provides a diverse cohort of undergraduate and Master's level students from California State Universities and community colleges with specialized coursework followed by 8-12 months long, full-time research internships in regenerative medicine-based host laboratories within research institutions or biotechnology/pharma companies.

COMPASS (EDUC5): The COMPASS program provides sustained academic and mentoring support to a diverse cohort of undergraduate students within California colleges and universities, with an added focus on identifying untapped talent and bringing diverse and inclusive perspectives to the work force. COMPASS students receive foundational coursework and conduct laboratory internships in regenerative medicine related disciplines.

Research Training (EDUC4): The Research Training program, nicknamed "CIRM Scholars", includes predoctoral graduate students as well as postdoctoral and clinical fellows. All CIRM Scholars receive specialized coursework and complete multi-year fellowships at world class research institutions around the state of California.

What are the goals of the Annual Trainee Network Conference?

The goals of the Annual Trainee Network Conference are to:

- Catalyze the formation of a CIRM Trainee Network that includes undergraduates, graduates, and post-graduates pursuing different areas of regenerative medicine
- Provide peer-to-peer networking and career-building opportunities for CIRM trainees exploring the next stages of their professional development
- Provide attendees with workshops/sessions of value such as diversity, equity and inclusion, patient advocacy, community outreach, mentorship, etc.
- Provide attendees an opportunity to share their research accomplishments more broadly

What is the size, timing, and location?

The Annual Trainee Network Conference should take place between May and August of 2024 and accommodate up to 600 attendees including culminating EDUC trainees, EDUC program personnel, and invited speakers/guests for a 2.5-day event. The conference should be hosted in a metropolitan area of California containing a major airport.



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This RFA will support the development and conduct of the 2024 Annual Trainee Network Conference through CIRM's Conference Grant Program. Under this mechanism, the Awardee will retain the primary responsibility for planning, directing, and executing the proposed event; however, the Awardee will work closely with the CIRM team to design and implement an event that is responsive to CIRM needs. The Awardee is expected to engage and collaborate with a steering committee appointed by CIRM to develop a meeting structure, agenda and to identify speakers and panelists.

More information about CIRM's Education programs can be found on the [CIRM website](#).

CIRM resources will support the following required core activities under this opportunity:

- ✓ Direct meeting logistics
 - Overall management of the conference including, but not limited to, site selection, food and beverage planning, meeting agenda, speaker and conference attendees, conference materials, third party sponsor coordination (if applicable) and other conference related tasks
 - On-site conference registration and services
 - Participation in regular conference calls with CIRM
 - Lodging for up to 18 CIRM team members
- ✓ Pre-conference logistics
 - Website management including website design, online conference registration, capture of poster abstracts from attendees during online registration and, as applicable, CVs/resumes
 - Preparation of digital attendee directory/abstract booklet
 - Act as main contact for team schedules and contact information and vendors and service providers
 - Floor plan and site map preparation including diagrams for offices, break out rooms, speaker ready rooms, food and beverage spaces, event spaces, and poster room environments
 - Poster session management, including rental of portable poster boards, set up and return
 - Coordination of food and beverage services and ensuring compliance with the California State reimbursement requirements
 - Coordination of travel, parking and housing as needed for attendees and guests
 - Management of all internet connectivity, AV and IT requirements before and during the conference
 - Management of livestream/internet access for conference sessions OR video recording of designated sections as requested by CIRM
 - Discussing and arranging for appropriate signage for posters and other conference related events



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- Safety and emergency response plan
- Solicitation and management of outside sponsorship (optional, but encouraged)
- ✓ Meeting day requirements
 - Venue set-up
 - Onsite conference registration and management
 - Work with hotel/venue contact onsite to coordinate food and beverage and event/meeting logistics
 - Manage all IT and AV requirements as needed during the conferences
 - Management of Career Fair, Alumni Panel, and/or other special sessions or workshops
 - Track attendee participation in sessions/events
 - Conference break-down
 - Security management
- ✓ Post meeting requirements
 - Survey and evaluation
 - Timely reporting to CIRM on meeting results
 - Provide photos from event to CIRM Staff
 - Make recorded sessions available on demand through the Conference Website
 - Report on attendee satisfaction and outcomes
 - Budget and Financial Reconciliation

Meeting Information

For purposes of this RFA, CIRM anticipates the Annual Trainee Network Conference will be held at a suitable venue in California for up to 2.5 days between May and August of 2024. June-July is the preferred timeframe, excluding July 9-13.

The budget for the Annual Trainee Network Conference is up to \$400,000 for all eligible costs and may not exceed this amount. Unspent funds for the 2024 Annual Trainee Network Conference will be returned to CIRM.

The meeting will include:

- Up to 600 attendees for full duration, +/- 50 with partial attendance (e.g., posters only, career fair only, etc.)
- Approximately 1200 room nights for participants (up to 86 of which are for speakers/guests/CIRM staff and are paid for by this grant)
- Career fair/networking event and special presentations by trainees and leading scientists in the field of regenerative medicine and/or EDUC program alumni



- 2 Breakfasts, 2 light lunches, 4 refreshment breaks and 1 reception of up to 600 people (all paid by this grant at CIRM allowable rates¹). If the event plan ends up calling for fewer meals, the budget should reflect appropriate reductions

Solicitation of outside sponsorship is allowed and encouraged, but not required.

Eligibility

What types of applicants are eligible for application?

(1) The applicant or applicant organization must satisfy the following requirements:

- Applicant organization has at least five years of experience in planning, implementing and hosting scientific/technical or educational conferences
- Program Director and one additional staff each have at least five years of experience organizing scientific/educational events
- A track record of hosting scientific or education conferences, including events that have required working with individuals and institutions not connected to the applicant organization
- Demonstrated ability to understand and utilize the role of scientific conferences in the professional development of trainees by reinforcing scientific learning, deepening trainees' understanding of the scientific process, and providing an opportunity to practice scientific communication skills

(2) The conference must be held in California by an eligible applicant and have a qualified Program Director (PD).

The conference must be conducted in California. California-based and non-California-based organizations (for-profit and non-profit) may use CIRM funds for eligible conference costs incurred in California. Foreign institutions are not eligible to apply for conference grant support.

Non-profit organization means either:

- (1) a governmental entity of the State of California; or
- (2) a legal entity that is tax exempt under Internal Revenue Code section 501(c) and California Revenue and Taxation Code section 23701d.

¹ The maximum per-person expenditures for meals and light refreshments according to CIRM's Business Meeting Expenditure policy may not exceed the following amounts: Breakfast \$28.00 Lunch \$49.00 Dinner \$85.00 Light refreshments \$20.00. The maximum per-person expenditures listed above include the cost of the food and beverages, labor, sales tax, delivery charges, and other service fees. CIRM's full Business Meeting Expenditure policy can be found at https://www.cirm.ca.gov/sites/default/files/files/funding_page/Business%20Meeting%20Expenditure%20Policy%2020221205.pdf



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A qualified Program Director (PD) is any individual with the skills necessary to direct the planning and execution of the proposed conference. The applicant must provide the PD's qualifications at time of application submission.

(3) The application must be accurate and complete.

All required components of the application must be completed and may not contain false or inaccurate information.

Schedule, Deadlines, and Budget

Applications Due	2:00 pm (PDT/PST) on October 24, 2023
Presidential Review and Approval	Approximately 14 days post submission
Budget	Up to \$400,000 for all eligible costs
Proposed Conference Date Window	May-August 2024
Meeting Length	Up to 2.5 days

Application Review Information

What is the process for evaluating an application?

Pre-submission Consultation

In accordance our mission, CIRM is committed to funding scientific conferences that focus on regenerative medicine research and educational programs to train future scientists. Prospective applicants are encouraged, but not required, to contact CIRM with questions to discuss their proposal, including eligibility, before applying for a conference grant.

Eligibility Review

CIRM will assess whether the application meets the eligibility parameters required under this program. If CIRM determines, in its sole discretion, that an application does not meet the eligibility parameters of the program, CIRM will notify the applicant of its decision and cease all further action on the application.



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Application Review

CIRM's governing board, the Independent Citizens Oversight Committee (ICOC), has delegated to the President of CIRM authority to review and make funding decisions for CIRM-initiated conferences.

The following criteria will be considered in the review of applications and funding decisions:

1. Experience and Track Record

Do the applicant organization and Program Director have the appropriate experience to manage and perform the proposed activities? Does the applicant organization have a proven commitment to educational conferences in science, medicine, biotechnology, and/or science education fields?

2. Resources

Does the applicant organization have the necessary resources to adequately manage the meeting and carry out all the required core activities in a timely fashion? Has the applicant organization appointed an appropriate team that will collaborate effectively with CIRM to understand needs, implement tasks, and manage the process?

3. Overall Value

Does the proposal offer a good value to CIRM by providing quality event management services for a reasonable price that is commensurate with use of California public funds? Are proposed costs appropriately justified?

4. Diversity, Equity and Inclusion

Does the applicant organization promote diversity, equity, and inclusion in the development and implementation of the conference?

Confidentiality

CIRM's confidentiality and conflict screening rules apply to everyone who will have access to applications or who will attend any review conference in which confidential information is discussed, including but not limited to CIRM team members, reviewers and members of the ICOC. (Per Gov. Code §6254.5(e) non-public records may be disclosed to government agencies under confidentiality agreements.)



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Application Components and Submission

How does one apply?

Applications must be completed and submitted online using the CIRM Grants Management Portal at <https://grants.cirm.ca.gov>. Any prospective PD must create a login in the system to access application materials and apply. Applications are available in the system only to the PD. A PD may submit only a single application in a given review cycle and may not submit additional applications during the review period.

Applications are due by 2:00pm (Pacific Time) on Tuesday, October 24, 2023.

What components does an application include?

The Grants Management Portal provides instructions for completing all the necessary components and submitting a final application. The application is designed to collect information necessary to appropriately evaluate the proposal and for CIRM to rapidly initiate an award if approved for funding. Applicants are required to indicate key personnel involved in the project, describe how the proposal addresses the objective of the funding opportunity, provide a detailed plan of proposed activities, and provide a budget for both meetings.

The application for CIRM Conference Grants consists of an Application Information and Proposal Form (Web-based document). Instructions for submitting an application can be found at: <https://www.cirm.ca.gov/about-cirm/education-conference-grants>.

The application for CIRM Conference Grant includes the following sections:

1. **Key Personnel:** List of main personnel who will contribute to the execution of the project and a description of their role.
2. **Budget:** Summary of costs by category requested from CIRM.

All allowable costs for research and conference grants are detailed in the CIRM [Grants Administration Policy for Discovery, Translation and Education Projects](#).

Allowable Costs for CIRM-Initiated Conference Grants include:

- Conference facility and equipment rental (including easels, poster display boards, tables/chairs and associated taxes and service fees)
- Transportation, parking, lodging, meals and incidentals for organizers, attendees and speakers. All authorized expenses must adhere to CIRM's travel policy.
- Hotel room charges and fees (overnight accommodations for CIRM staff and speakers)



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- AV equipment rental and planning costs (e.g., audio/visual and internet connectivity) (and associated taxes and service fees)
- Meeting planning and management costs that include up to 10% justified salary support for the Program Director for time spent conducting conference-specific activities; reasonable salary support for administrative staff time conducting conference-specific activities; and meeting planner costs
- Production, publicity and supply costs (website development, program printing or electronic media, name tags, etc.) needed for conduct of the conference (only if received for use during the budget period)
- Meals (food and non-alcoholic beverages) served to attendees during the conference
- Other items as described in the [CIRM Grants Administration Policy](#)

These costs are allowable whether incurred by the applicant or by contracted vendors providing the above services needed to conduct the conference.

Non-allowable Costs for CIRM-Initiated Conference Grants

Non-allowable costs include purchase of equipment; visas; passports; entertainment; alcoholic beverages; personal telephone calls; laundry charges; dues; cash awards; alterations or renovations. The CIRM Grants Administration Policy also indicates unallowable costs. Indirect Costs are not allowable on this award.

3. Conference Coordination and Logistics Plan: A description of your ability to work with CIRM to coordinate and plan the envisioned Annual Trainee Network Conference. Similarly, describe your plans to coordinate and manage external partnerships with third party vendors or service providers to execute the meeting logistics, including for example, meeting venues/hotels, AV/IT providers, security services, etc.

4. Experience and Track Record: A description of the experience of the PD and the applicant institution in the organization and conduct of scientific and educational conferences, including the track record of managing similarly sized conferences in science, medicine, biotechnology, and/or science education fields.

5. Available Resources: A description of the resources you have to ensure that the meeting is adequately managed and that all required core activities are carried out in a timely fashion. A description of how an appropriate team will be appointed that can collaborate effectively with CIRM to understand needs, implement tasks, and manage the conference planning and execution process.

6. Overall Value: A summary of how this proposal offers a good value to CIRM by providing quality events management services for a reasonable price that is commensurate with use of California public funds, and by appropriately justifying proposed costs.



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7. Diversity, Equity and Inclusion Plan: A description of how your organization will promote diversity, equity, and inclusion in the development and implementation of an Annual Trainee Network Conference.

Because CIRM is prohibited from taking race, ethnicity, national origin, and gender into account in making grant decisions, applicants should refrain from describing the race, ethnicity, national origin, or gender of applicant organization personnel. However, applicants may describe other characteristics of diversity such as individuals who: (a) grew up in low-income families or come from socioeconomically disadvantaged communities; (b) are the first in their family to attend college; or (c) have overcome educational, economic, physical (e.g., disability), or other barriers to opportunities.

8. Supporting Documentation: Available quotes from service providers, a sample agenda and any other relevant documentation as a single PDF file with table of contents.

Award Administration

Issuance of Award

A CIRM Conference Award is issued via a Notice of Award, which is the formal contract that defines the terms and conditions of an award and documents the commitment of funds from CIRM. The Awardee will be subject to CIRM's Grants Administration Policy, including the insurance requirements specified therein.

Pandemic or other contingency: If CIRM determines that any of the parameters outlined in the Notice of Award must be changed to accommodate unexpected circumstances, CIRM will work with grantee to determine what re-budgeting is necessary and allowable to enable the meeting to go forward.

Reporting

Awardees will be required to provide written outcome and financial reports to CIRM upon completion of the conference. Awardees should include the final conference agenda or program. All unobligated funds at the end of each annual budget period must be returned to CIRM.

Contacts

For general information about CIRM's EDUC Programs or the Annual Trainee Network Conference:

Email: education@cirm.ca.gov



For information about the RFA or Review Process:

Kelly A. Shepard, Ph.D.

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Definitions

“California organization” means: An entity, regardless of profit status, that has >50% of its employees located in, and paid in, the state of California, and conducts the award activities from the California location.

“For-profit organization” means: a sole-proprietorship, partnership, limited liability company, corporation, or other legal entity that is organized or operated for the profit or financial benefit of its shareholders or other owners. Such organizations also are referred to as “commercial organizations”.

“Key Personnel” means (i) the program director; or (ii) any other person, including an independent consultant or an employee of a Subcontractor who is expected to contribute to the development or execution of the project in a substantive, measurable way and who is expected to: (a) receive or has been promised income, or anything else of value, of \$10,000 or more per year through the proposed project or (b) contribute one percent (1%) or more of their effort to the proposed project. “Key Personnel” does not include a person who is expected to be involved in the proposed project but who does not satisfy paragraphs (i) or (ii).

“Non-profit organization” means: (1) a governmental entity of the state of California; or (2) a legal entity that is tax exempt under Internal Revenue Code section 501(c)(3) and California Revenue and Taxation Code section 23701d.

“Subcontractor” means an organization (other than the applicant organization) that is expected to: (a) contribute to the scientific development or execution of the project in a substantive, measurable way *and* (b) receive \$25,000 or more through the proposed project. “Subcontractor” does not include suppliers of widely available goods.



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Appendix

CIRM Regulations

Grant or Loan awards made through this RFA will be subject to all applicable CIRM regulations. These regulations can be found on CIRM's website at <https://www.cirm.ca.gov/our-funding/cirm-stem-cell-grant-regulations>.

Revisions

Revision Date	List of Changes
08/23/23	<ul style="list-style-type: none">Clarifying allowable costs