

# Request for Proposal

## AUTM PARTNERING MEETINGS

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### Overview:

The Association of University Technology Managers (AUTM) is seeking proposals to host an Industry Partnering Forum meeting. Universities or a collaborative group of organizations that would like to co-host an event are encouraged to apply.

Industry Partnering Forum meetings provide technology transfer professionals from industry and universities a unique opportunity to network in a particular technology sector and explore opportunities to form collaborations in areas such as intellectual property licensing, research and other areas to collaborate. The meetings are intended to be small events, with approximately 50-75 attendees, to foster more robust networking opportunities.

These meetings are a full day event with an evening reception the night before. The format includes presentations from industry partners highlighting particular technological areas of interest and how to best work with their company; one or more short panel sessions dealing with technology transfer topics relevant to the particular technology sector; and plenty of opportunities for one-on-one partnering. A sample agenda is provided below.

The RFP process is open to both universities and companies, or applications from multiple organizations that plan to co-host an event. Proposals will be reviewed by the committee and a decision will be made within 60 days of submission. AUTM intends to host three or four partnering forums each year.

### Partnering Forum History Examples

Date	University/Host	Focus	Attendance
April, 2014	Case Western Reserve University	Medical Imaging	54
Sept., 2014	Wake Forest Innovations	Neuro/Ortho Medical Devices	48
Oct., 2014	Rice University	Energy (Gas & Oil)	47
June 2015	Wichita State	Aerospace	50
Sept. 2015	Kansas State & Auburn	Animal Health	75

### Hosting Requirements:

The hosting organization will be required to provide the following support and logistics:

- Meeting space (AUTM will negotiate and execute contract)
  - Conference rooms for plenary discussions
  - Exhibit space – tables for each organization represented
  - Space for meals
  - Space for private partnering meetings (informal seating or round tables for small groups)
- Audio Visual equipment (complimentary or low cost)
- Recommendations for catering services for meals (AUTM will negotiate and execute contract)

- Recommendations for hotel accommodations (AUTM will negotiate hotel reservation contract)
- Ensure availability for the point of contact person responsible (and person implementing if delegated) to work with AUTM staff on coordination of:
  - Meeting
  - Reception
  - Registration
  - All other logistics
- Convene a working committee of 3-8 members
  - Ideally, the committee members would be active in that technology sector and have numerous contacts with companies and universities in that sector.
  - Ideally, committee members will be half from industry and half from academia
  - Attend regularly scheduled conference calls
- Work with the AUTM staff to secure sponsorship for the meeting
  - Current goals are \$1,500 in sponsorship per sponsor with a minimum of \$6,000 per event. Sponsorship goal may need to be higher if the proposal includes extra expenses, such as paying for meeting space or a special event.

**Budget Requirements: (will vary by budget year)**

**Revenue**

Registration	\$16,000
Sponsorship	\$6,000

<b><u>Expenses</u></b>	\$15,800
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<b><u>Net gain</u></b>	\$7,500+
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**Timeline for Meeting Development:**

To have a successful meeting, preparation well in advance of the meeting date is important. The following is a recommended timeline for completion of various tasks in setting up an Industry Partnering Forum event:

**Twelve to eight months out:** Submit your proposal to AUTM a minimum of 8 months prior to your desired meeting date.

**Eight months out:** Select hotel and meeting site; finalize committee members; send save-the-date announcements

**Six months out:** Marketing flyers prepared and initial list of technologies compiled; initial invites sent to potential attendees; potential sponsors identified; begin planning program content and agenda

**Five – three months out:** Sponsors committed; reminders regarding the event sent periodically to potentially attendees; committee members registered for the meeting; initial list of technologies posted on the event website; identify welcome/keynote speaker if part of agenda; finalize program agenda

**Two months out:** At least 25 attendees committed; finalize commitments for panel members

**One month out:** Schedule ready for printer; finalize content for panel sessions

## Proposal Requirements:

Written proposals should include the following:

- Organization name
- Submitters name and contact information of person who will act as the point of contact
- Technology focus
  - Explanation of why your university/organization is uniquely positioned to host this event
- Location details
  - Does your location meet the hosting requirements listed above? Please explain.
- Potential dates for the forum
  - Consult with AUTM on calendar of events
- List of potential companies to participate
  - A minimum of two companies must already have demonstrated commitment to attending, before selection of dates will be confirmed.
  - Names of companies to be invited
- List of potential university attendees to the forum
  - Describe your plan for reaching out to potential university attendees
  - Names of universities to be invited
- List of potential sponsors for the forum

## Submission Deadlines – Rolling Submissions

These quarterly deadlines are guidelines. Please submit your proposal as soon as possible to allow the maximum amount of planning time for your event.

- **January 15**
- **April 15**
- **July 15**
- **October 15**

## Suggestions

Below are some suggestions for things to consider as you prepare your proposal. In the past, these have helped make certain events stronger, but they are not required

- Pre-proposal stage: Well before the proposal deadline, talk with several potential attendees of the forum you are considering, particularly industry contacts. Ask them if this kind of event would interest them, if they would attend a stand-alone event, and other questions that may direct you to the appropriate model, timing and location for a forum in your targeted industry. You may also be able to turn these conversations into letters of support, committee member leads and/or sponsorship leads.
- Co-hosting. Is there another institution that could co-host the event with you? This would help share the work load, and also automatically increase your initial network of contacts.

- Co-location. Is there an already existing event specific to your industry that attracts industry and/or university people to a given location? If so, you can explore co-locating the partnering event to leverage that potential nucleus of attendees.
- Leverage AUTM Meetings. The AUTM Annual Meeting and the regional meetings offer great opportunities to interact with industry and university contacts that understand the AUTM mission, and partnering meetings are built into the format. You can leverage these meetings for pre-proposal research or recruiting sponsors, attendees, speakers, etc.

### **Selection Criteria:**

Successful Partnering Forum Meetings have attendees from both universities and companies that have a strong presence in the particular technology sector upon which the meeting is focused. Thus, marketing of the meeting to inform the value and entice attendance from both a diverse number and type of companies and universities is a key activity in hosting a meeting. Ideal proposals will have multiple contacts within industry and academia in the technology sector to contact regarding attendance. Such contacts would form the basis of not only potential attendee lists, but also committee members and sponsors. Strong proposals in the past included letters of support from interested industry partners, preferably with commitments of attendance and an industry representative on the committee.

### **Host Perks:**

For hosting an AUTM Partnering Meeting, the host organization will receive the following benefits:

- Four complimentary registrations
  - o Additional attendees from the host university/organization will receive a discounted \$50 registration fees
- Host organization will emcee the event and will have the opportunity to make opening remarks
- Coordinated Press Release on the AUTM Partnering Forum
- Worldwide marketing exposure
- Host logo will appear on all marketing materials and AUTM website

### **AUTM Obligations:**

AUTM will provide:

- Overall coordination and program development (with Planning Committee);
- Marketing for the event
- Registration services
- Collateral development
- Payment of all invoices
- Set up and provide access to AUTMConnect™ Partnering Software for all attendees
- Onsite staff assistance at the event

### **Sample Agenda**

Evening Reception

Registration available

7-8:30 pm: AUTM reception at Host Hotel (or Organization site)

Day of the Event

8 – 9 a.m.	Breakfast
9 – 9:30 a.m.	Welcome and Introductions; Plenary Speaker
9:30 – 10:30 a.m.	Representative Introductions
10:30 – 11:30 a.m.	Partnering/Exhibit Table Viewing
11:30 – 12:30 p.m.	Session
12:30– 1:30 p.m.	Networking Lunch
1:30 – 2:30 p.m.	One-on-One Partnering Meetings
2:30 – 4 p.m.	Roundtable Session- Hear what specific companies in industry are looking for in relationships with universities
4 – 4:30 p.m.	Wrap-up Discussion

**[View Sample Program:](#)**

[Animal Health Partnering Forum](#)