Request for Proposal

AUTM PARTNERING MEETINGS

## Overview:

The Association of University Technology Managers (AUTM) is seeking proposals to host Industry Partnering Forum meetings. 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 partnering events, with approximately 50-75 attendees, to foster more robust networking opportunities. Outreach to university and industry attendees should be nationwide, and potentially international.

These meetings are a full day event, typically 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, and one or more short panel sessions dealing with technology transfer topics relevant to the particular technology sector. The primary goal of the forums is to foster networking and dialogue on partnering best practices between industry and academia, and should not be viewed as a showcase of the host university’s capabilities, although increased awareness and branding of your university can be a side benefit. The schedule should allow for plenty of opportunities for the main focus of the event: 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.

A free webinar on hosting a partnering forum can be found on the [AUTM website here](http://www.autm.net/AUTMMain/media/Webinars/WEB170302/Hosting-an-AUTM-Partnering-Forum-(3_2017).mp4):

## 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 |
| June 2015 | Wichita State | Aerospace | 50 |
| September 2016 | University of Saskatchewan | Crop/Food Processing | 68 |
| October 2016 | Case Western Reserve University | Smart Power and Energy | 55 |
| August 2017 | Kansas State & Auburn | Animal Health | 69 |

## Hosting Requirements:

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

* Providing recommendations for 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 4-8 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
  + Committee members should be from across the US (and/or Canada), not regional
  + Attend regularly scheduled conference calls
  + Actively reach out to universities and industry nationwide for attendees
  + Set agenda, including format, speakers and content
  + Recruit sponsorship.
    - Current goals are $1,500 in sponsorship per sponsor with a minimum of $7,500 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.

AUTM Obligations:

AUTM will provide:

* Overall coordination and program development (with Planning Committee);
* Mass marketing for the event; however, most of the recruiting will require legwork by the planning committee, and particularly the host institution
* Registration services
* Processing of sponsorship forms and payments
* Collateral development
* Payment of all invoices
* Negotiation and execution of contracts for meeting space and hotel block
* Set up and provide access to AUTMConnectTM Partnering Software for all attendees
* Onsite staff assistance at the event

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

**Revenue**

Registration $16,000  
Sponsorship $7,500

**Expenses** $15,800

**Net gain** $7,700+

**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. If this goal has not been reached, AUTM reserves the right to cancel the event.

**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 three companies must have demonstrated commitment to attending, before selection of dates will be confirmed. Letters of commitment are required.
  + 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

## Cancellation of a forum

As stated in the timeline above, at least 25 attendees must be registered 60 days prior to the event date. If this number has not been reached, AUTM has the right to cancel the event.

## Submission Deadlines – Rolling Submissions

Proposals can be submitted on a rolling basis with no specific deadlines. The most pressing deadline will be the target date or your proposed event. Please submit your proposal as soon as possible, and at least eight months prior to your proposed event date, to allow the maximum amount of planning time for your event. Proposals can be informally submitted before they are fully flushed out and/or before all letters of support are received, to enable feedback from the committee. This will help facilitate a faster approval process once the proposal is finalized.

## 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. Attracting industry representation is what will drive a successful event.
* 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 combined 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
  + 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

## 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 optional

9:30 – 10:30 a.m. Panel Session

10:30 – 11:30 a.m. One-on-One Partnering Meetings

11:30 – 12:30 p.m. Panel Session

12:30– 1:30 p.m. Networking Lunch

1:30 – 2:30 p.m. One-on-One Partnering Meetings

2:30 – 3:30 p.m. Roundtable Session- Hear what specific companies in industry are looking for in relationships with universities

3:30 – 4:30 p.m. One-on-One Partnering Meetings

4:30 – 5:00 p.m. Wrap-up Discussion / Closing

The forum can have optional events before or after the event, which could be used for social/networking events, or showcase events.

## View Sample Program:

[Animal Health Partnering Forum](http://www.autm.net/AUTMMain/media/Events/AUTMPartForumAnimalHealthFP_lrFNL.pdf)

## Possible Partnering Forum Topics:

These are suggested topics; AUTM does not dictate what evens are to be done

* Digital health (wearables, IT)
* Oncology (or subset, e.g., immunotherapy)
* Vaccines
* Industry-sponsored clinical trials
* Microbiome / probiotics
* Drug delivery
* POC Diagnostics
* Biomedical engineering (or subset)
* Water technologies
* Electronics (or subset)
* Big data
* Financial tech / ecommerce
* Robotics
* Sensors (or subset)
* Materials (or subset)
* Chemicals (or subset)
* Nanotechnology (or subset)
* Consumer Products

# Questions

For questions regarding Partnering Forums, please contact Becky Gilbert at 847-686-2298 or email her at [rlgilbert@autm.net](mailto:rlgilbert@autm.net).