![Aurora Institute logo]

Request for Proposals

Seeking Events Management Support for
Aurora Institute Symposium 2022 (Virtual) and
Planning for Symposium 2023 (In Person/Hybrid)

RFP RELEASE DATE: JANUARY 26, 2022 | SUBMISSIONS DUE: FEBRUARY 15, 2022
PROJECT TIMELINE: MARCH 2022 - DECEMBER 2022

Overview

The Aurora Institute is seeking an event management partner to:
- Plan and execute its flagship event, the Aurora Institute Symposium 2022 (to be held virtually on October 24-26), and
- Support Aurora in planning to host an in-person, hybrid Symposium in fall of 2023.

Aurora is seeking a firm with deep logistical and technical experience running events (in-person, hybrid, and virtual).

We are seeking a partner to act as the primary event manager for the virtual Symposium 2022 and event planner for the anticipated in-person, hybrid Symposium 2023, who is driven by a focus on equity and can help us think creatively and innovatively about time and space to inspire and challenge new ways of thinking about attendee experiences for virtual and in-person hybrid events.

Organizational Background

The mission of Aurora Institute is to drive the transformation of education systems and accelerate the advancement of breakthrough policies and practices to ensure high-quality learning for all.

The world has changed; so too must our education system. Around the country and across the globe, schools are changing to modernize how teachers teach and how students learn – replacing traditional, time-based structures with new innovative, mastery-based, student-centered learning models. Educators and school leaders are driving this transformation and re-imagining teaching and learning with new school designs to ensure all students build knowledge and skills, can apply it to real-world problems, and build the competencies they need to become lifelong learners. Our collective efforts are disrupting inequitable K-12 education practices and supporting all youth to successfully design their futures.

About the Aurora Institute Symposium

The Aurora Institute Symposium 2022 will be a fully virtual, three-day event occurring on October 24-26, 2022. We anticipate approximately 1,400 attendees.

The Aurora Institute Symposium 2023 will be a live, in-person event with a hybrid experience (tentatively), where dates and location have not yet been determined. We anticipate approximately 750 in-person attendees and 750 attendees who participate virtually.

The goals of the Symposium are to:
- Position Aurora as a thought leader setting a new vision for the future of education
- Share knowledge and concrete implementation guidance on future focused, student-centered, next generation learning (personalized, competency-based education) as well as deepen understanding on key issues to advance equity in K-12 education and pathways forward
- Develop skills and capacity to do the work of leading change in K-12 education
- Engage the field of K-12 education innovators and enable networking
- Include students as key voices driving change
- Build a movement for reimagining education
- Inspire action and change in communities across the country

We envision Symposium 2022 (virtual) to be similar in structure and substance to Symposium 2021 (virtual). For a snapshot of the Symposium 2021 details, please see Appendix A. Aurora understands the key challenges surrounding hosting virtual events. We know educators are facing enormous challenges, many are burned out and face a multitude of competing priorities with overbooked schedules, and are experiencing the fatigue of attending online events. We are seeking an event partner who can help us think creatively about these challenges while bringing together a diverse set of voices and engaging our key audiences in K-12 education innovation in meaningful ways.

We are excited to partner with an events planning firm to inspire new ways of planning and executing a virtual event for the Symposium 2022 as well as help us with planning for a future 2023 in-person, hybrid Symposium.

Scope

Aurora Institute Responsibilities:
- Manage the program, all program content development, and determine the agenda. Aurora has subject matter experts in-house and a program committee in the field who work to craft the programmatic content.
- Open a Request for Presentation Proposals process, which solicits presentation proposals on key issues facing the field, and accept sessions that become the Symposium breakout sessions program content.
- Select keynote speakers, student speakers, and all other program content, including selection of short video clips of students to showcase throughout the Symposium.
- Provide all event marketing and communications, including the design of the sponsor prospectus and program book.

- Approve registration pricing.
- Communicate with keynote speakers, with support from the event management firm as needed.
- Provide oversight of and collaborate with the events management firm.
- Select vendors, partners, and systems, with the events management firm's support and recommendations.
- Bring student voice forward as a major component of the entire event. Youth involvement is a cornerstone to Symposium programming, including showcasing student presentations, video clips by students in K-12 education, and/or youth performances.
- For students who participate, collect student release forms.
- Handle conference evaluations.
- Develop slides and other presenter materials and trainings.
- Manage sponsorship program, with support and coordination from the event management firm.

Event Management Support Partner Responsibilities: Aurora is seeking an event management support partner to lead all aspects of logistical and technical planning, implementation, and execution for the virtual Symposium 2022, and support Aurora in planning to host an in-person, hybrid Symposium in fall of 2023.

Aurora invites events planning and management firms to submit proposals to plan and manage aspects listed below, in consultation with Aurora staff:
Symposium 2022 (virtual):
- Lead event planning and management. (We anticipate a similar structure to [Symposium 2021](.).)
  - Provide overall event management support, including logistical and technical support prior to and during the event, including but not limited to:
    - Appropriate Zoom setup of keynote plenaries and breakout sessions with appropriate licenses.
    - Manage, produce, and run live keynote plenaries (sharing screen, running slides for speakers, spotlighting correct speakers, handling technical/security issues, letting in/muting attendees, ensuring appropriate permissions, etc.). Host A/V check with all keynote speakers directly before the keynote.
    - Live stream keynotes on Aurora's social media channels.
    - Record all sessions.
    - Handle technical difficulties.
  - Create and manage a Symposium event planning and management schedule and ensure deadlines are met.
  - Provide guidance and implementation support for technologies to use during the virtual event in 2022 and ramping up for an in-person, hybrid event in 2023.
  - Provide technology-related assistance to staff, attendees, and speakers before and during the event.
  - Provide one room monitor per breakout session with the requisite skills to support the presenters with logistical and technical questions, and handle technical difficulties. (Aurora staff can help with room monitor duties.) Event firm will provide all room monitors with training in advance and host daily check-in meetings during the event.

- ○ Develop a run-of-show document.
  - ○ Post-event, download and archive all keynote and session recordings, chat box histories, and attendance reports.
- Provide registration services:
  - ○ Lead on building, testing, opening, and running the Symposium online registration system, with Aurora's oversight and support. We use the Fonteva event registration system (which was used in 2021 and is integrated with our Salesforce CRM).
  - ○ Serve as primary contact for Fonteva and troubleshoot as necessary.
  - ○ Provide attendee and sponsor registration services. Respond to customer queries and process registrations.
  - ○ Handle manual entry of registrations as needed.
  - ○ Prepare and send registration confirmations as needed.
  - ○ Provide registration lists and reports to Aurora on an ongoing basis. Determine final registration count.
  - ○ Manage registrations during the event.
- Provide vendor oversight and management:
  - ○ As Aurora selects vendors, lead on contract negotiations and serve as the primary contact for vendors.
  - ○ Support sponsorships program and provide coordination for management of sponsors as needed.
- Lead speaker management:
  - ○ Manage and send speaker communications for breakout sessions with Aurora's oversight. Handle speaker queries and requests.
  - ○ Plan and host keynote walk-throughs, and support Aurora with keynote speaker special requests and communications needs. Create keynote facilitation guides.

Symposium 2023 (in-person, hybrid):
- Lead event planning and management.
  - ○ Create and manage a Symposium 2023 schedule and ensure deadlines are met.
  - ○ Provide recommendations on systems and platforms for hybrid events.
  - ○ Gather and share recommendations for hosting future in-person and hybrid convenings.
- Support the selection of a venue for an in-person, hybrid Symposium 2023.
  - ○ Provide support in scoping and selecting a venue for an in-person, hybrid Symposium 2023, including venue research, outreach, creating and issuing an RFP, responding to RFP questions, reviewing and analyzing proposals, and presenting the top recommendations with total cost analysis, including an IT/AV cost analysis.
  - ○ Once a venue is selected, support site negotiations and contracting, and attend one planning visit to conduct a physical site inspection of the venue (which includes scheduling associated meetings, including meeting with venue contacts and local vendors, creating a list of function requirements and challenges, and laying out all critical areas for exhibits, registration, meals, breaks, and sessions).
  - ○ Assess meeting space needs. Create room and setup diagrams, ensuring flow of sessions works.
- Provide vendor oversight and management:
  - ○ Support selection of needed vendors for a variety of services related to production and events.

- Provide off-site vendor recommendations and references. As Aurora selects new vendors, lead on contract negotiations and serve as the primary contact for vendor relations.
- Support sponsor and exhibitor planning:
  - Support Aurora in thinking creatively about sponsor and exhibitor opportunities and pricing for in-person and hybrid events.
  - Work with Aurora to set up sponsor and exhibitor opportunities and to identify target market.
  - Develop guidelines, rules, and regulations for sponsors and exhibitors based on venue requirements.

The event may encompass:
- Sessions and workshops on key issues to transform K-12 education systems, such as global best practices, K-12 competency-based education, personalized learning, online/remote learning in context of COVID-19 recovery, designing for equity, social emotional learning, and more; the audience is K-12 education practitioners and others working to transform K-12 education.
- Sessions and workshops that model the next generation learning environments we seek to promote.
- Student voices sharing their experiences in future-focused learning environments and student performances.
- Discovery of new teaching and learning approaches.
- Networking opportunities for attendees to connect and learn from each other.

Other pertinent information:
- **Budget**: We invite proposals with budgets in alignment with estimated resources it will take to carry out the work in this RFP, including the planning and execution of the virtual Symposium 2022 as well as planning and providing guidance for an in-person, hybrid Symposium 2023. Please break out costs for each event, with one budget for activities supporting Symposium 2022 and a separate budget for activities supporting Symposium 2023. We expect to negotiate a "not to exceed" contract with deliverables. Our event partner for this work will be invited to submit subsequent proposals to assist us with future events, such as leading on the implementation of a hybrid Symposium 2023.
- **Timing of Services**: Aurora Institute is seeking a partner that will be able to immediately begin planning the event upon award of the project. It is anticipated that work will begin on or before March 15, 2022.

Proposal Evaluation

Selection of the service provider will be determined by senior Aurora Institute staff. Important criteria include, but are not limited to:
- Verifiable events management success, including:
  - Experience in designing, planning, managing, implementing and executing high-quality events, including in-person, hybrid and virtual events, ideally with K-12 education audiences.
  - Expertise in events planning, management, logistics, and support.
  - Experience with vendor management.

- ○ Experience in using Aurora's systems, including Airtable, Fonteva (for attendee registration), and Zoom. Familiarity with Salesforce and Marketing Cloud is a plus.
  - ○ Experience with sponsor management and vendor management.
  - ○ Expertise in planning and implementing hybrid events.
- Company background
- Expertise and dedicated hours of primary lead and team assigned to support Aurora.
- Cost, fee schedule, and budget development.
- Alignment and deep commitment to Aurora Institute's values: equity-driven, student-centered, future-focused, credible, knowledge-driven, and collaborative.
- Thoughtfulness of and creative approach to this work.
- Evidence of track record of experience with diversity, equity and inclusion.
- Experience working collaboratively with clients, vendors, and partners.
- Experience with scoping and selecting in-person venues.
- Ability to provide services upon award of contract.

See the full scoring rubric here.

Submission Instructions

By close of business on February 15, 2022, submit proposals to **both**:
> Natalie Slocum, Strategic Partnerships Director, nslocum@aurora-institute.org
> Loretta Goodwin, Chief Operating Officer, lgoodwin@aurora-institute.org

Proposals should not exceed 10 pages. Proposals must be submitted in a PDF format.

Proposals must include the following:
- A firm profile, length of time in business, and a description of the firm's core competencies, including experience planning and executing in-person, virtual, and hybrid events.
- Narrative of approach to this work.
- Portfolio and case studies of similar work completed for previous clients. If possible, provide links to archived videos of prior virtual events.
- A description of the firm's availability to begin the project in accordance with the anticipated schedule.
- A budget, including a list of service fees for the completion of work as currently described in this RFP and the total estimated cost to complete the entire project.
- Staffing/consulting model. Biographies for primary lead and team assigned to the event, including expertise, tenure with the firm, the number of hours each individual can devote on a weekly basis to this project, and an estimate of the total number of hours to complete the project.
- Three references, including the type of work done for each and the date of completion. Please include organization name, address, website, phone number, email and contact names.
- A summary explaining why your firm is most qualified.

Other Important Information

The selected service provider will be notified by March 9, 2022. Those not selected will be informed via email shortly thereafter.

Questions regarding this RFP may be submitted to **both** nslocum@aurora-institute.org and lgoodwin@aurora-institute.org with the subject line [Aurora Institute Symposium 2022 RFP Question]. Aurora will respond to questions by issuing FAQs documents to all interested parties.

Aurora will not host one-on-one meetings with interested parties while the RFP remains open, unless initiated by Aurora. Aurora Institute reserves the right throughout this process to select the provider that best meets its requirements. Respondents understand that neither issuing this RFP nor receiving it constitutes any kind of agreement with or commitment by the Aurora Institute. Submissions that do not include all of requested information, particularly budgetary components, will not be considered. Aurora is unable to provide feedback on declined proposals.

APPENDIX A – Background: Aurora Institute Symposium 2021 (Virtual)

The Aurora Institute Symposium 2020 and 2021 were held fully virtually, given the uncertainties around COVID-19, and the safety and well-being of our attendees remains our highest priority.

Symposium 2021 was a virtual three-day conference held on October 25-27, 2021 with 1,222 attendees hosted on Zoom, and we anticipate a similar turnout and structure for 2022. We did not use a separate event platform other than Zoom. We anticipate using Zoom again for the 2022 Symposium.

Below is a snapshot of the virtual Symposium 2021 agenda, which can also be found on the Aurora website here.

Day 1: October 25, 2021
11:00-11:45 AM ET - Opening Keynote Plenary
12:00-1:00 PM ET - Breakout Sessions (5 concurrent)
1:15-2:15 PM ET - Breakout Sessions (7 concurrent)
2:30-3:30 PM ET - Breakout Sessions (8 concurrent)
3:40-4:00 PM ET - Twenty-Minute Power Sessions & Programs to Watch (10 concurrent)

Day 2: October 26, 2021
11:00-11:45 AM ET - Keynote Plenary
12:00-1:00 PM ET - Breakout Sessions (6 concurrent)
1:15-2:15 PM ET - Breakout Sessions (10 concurrent)
2:30-2:40 PM ET - Ten-Minute Ignite Sessions (4 concurrent)

Day 3: October 27, 2021
11:00-11:45 AM ET - Keynote Plenary
12:00-1:00 PM ET - Breakout Sessions (6 concurrent)
1:15-1:35 PM ET - Twenty-Minute Power Sessions and Programs to Watch (8 concurrent)
1:45-2:45 PM ET - Closing Student Panel Keynote

In 2021, there were between 4-10 concurrent breakout sessions with the number of attendees ranging from 25-120 per session, and we anticipate a similar structure and numbers in 2022. Attendees registered for the conference in advance via the Fonteva Events platform integrated with our Salesforce CRM. Attendees were able to decide in real time which live breakout sessions to attend.

Zoom enabled presenters and participants to utilize video, screen sharing, breakout rooms, annotation, chat box, polls, and more to allow for maximum interactivity. Symposium keynotes were mainly live with one pre-recorded. For 2022, we anticipate having all live keynotes and breakout sessions that will be recorded and shared post-Symposium as well as archived on the Aurora website for later viewing. You can view the 2021 speakers and session content at these links: Day 1, Day 2, and Day 3. Keynote planning meetings were hosted with keynote speakers prior to the event and room monitors held 15-minute tech checks prior to the start of breakout sessions with presenters.