CIRM
CALIFORNIA'S STEM CELL AGENCY

Funding Opportunity to Manage the 2023 Bridges Annual Meeting

EDUC 1.4

REQUEST FOR APPLICATIONS

09/23/22

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Objective

The mission of the California Institute for Regenerative Medicine (CIRM) is to accelerate stem cell treatments to patients with unmet medical needs.

The objective of this request for applications (RFA) is to solicit a highly qualified applicant to develop and manage the 2023 annual meeting in support of the CIRM Bridges program.

Award Information

What is the Bridges Program?

The Bridges program enables California academic institutions to create training programs that will significantly enhance the technical skills, knowledge, and experience of a diverse cohort of undergraduate and Master's level trainees in the development of stem cell based therapies. The Bridges Annual Meeting will be a one to two-day program that highlights the work of these students through posters and presentations and will also feature talks by patient advocates and leading scientists in the field of regenerative medicine.

What activities will CIRM support?

This RFA will support the development and conduct of the 2023 Bridges Annual Meeting 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 CIRM team will work with the Awardee to review and approve design and implementation of the event during the planning phase to make sure it is responsive to specific CIRM needs. The meeting conducted under this RFA will showcase the scientific accomplishments of the student participants, create

networking opportunities, and feature presentations from patient advocates and scientists in the field.

More information about this CIRM internship program can be found on the CIRM website at https://www.cirm.ca.gov/our-impact/internship-programs.

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, and other conference related tasks
  - On-site conference registration and services
  - Lodging for up to eight CIRM team members

- ✓ Pre-conference logistics:
  - Website management including website design, online conference registration, capture of poster abstracts from attendees during online registration
  - Preparation of program book with speaker bios and poster titles
  - Develop contracts/service agreements with vendors and service providers as needed
  - Participate in regular conference calls with CIRM team
  - Floor plan and site map preparation including diagrams for break out rooms, food and beverage spaces, event spaces, and poster room
  - Coordinate food and beverage services and stay within the California state per diem requirements
  - Travel and housing coordination as needed
  - Discuss and arrange for appropriate signage/map for posters and other conference related events

- ✓ Meeting day requirements:
  - Venue set up
  - Conference registration
  - Work with hotel contact on-site to coordinate food and beverage and meeting logistics
  - Manage all AV requirements as needed during the conferences
  - Conference break down
  - Security management
  - Post meeting: timely reporting to CIRM on meeting results

Meeting Information

(1) <u>Bridges Meeting</u>

For Purposes of this RFA, CIRM anticipates the Bridges Annual Meeting will be held at a suitable venue in California for up to 2 days during May, June or July of 2023. The meeting will include:

- Up to 250 attendees

- Approximately 250 room nights for participants (up to 20 of which are for speakers and are paid for by this grant)

- Budget sufficient for 2 breakfasts, 2 lunches, 4 refreshment breaks and 1 dinner of 250 people and 1 dinner/reception of 180 people (all paid by this grant at CIRM per diem rates*). If the event plan ends up calling for fewer meals, the budget should reflect appropriate reductions.

- The budget for the Bridges Annual Meeting is up to $180,000 for all eligible costs and may not exceed this amount. Unspent funds for the 2023 annual meeting will be returned to CIRM.

* The maximum per-person expenditures for meals and light refreshments may not exceed the amounts defined in <u>CIRM's Business Meeting Expenditure</u> policy, which are currently: Breakfast $27.00; Lunch $47.00; Dinner $81.00; Light refreshments $19.00. Please note, however, that these amounts are anticipated to change pending action from CIRM's Governing Board in fall of 2022. **Please Review CIRM's policy prior to submitting an application for updates**, to ensure that the most current allowances can be considered.

The maximum per-person expenditures listed above include the cost of the food and beverages, labor, sales tax, delivery charges, and other service fees. Download CIRM's <u>Business Meeting Expenditure Policy</u> document for full details.

Eligibility

<u>What types of applicants</u> <u>are eligible for application?</u>

(1) To be eligible, the applicant or applicant organization must satisfy the following requirements:

- Applicant organization has at least five years of experience in hosting scientific or education events
- 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) Meeting must be held in California by an eligible applicant and have a qualified Program Director (PD)

The conferences must be conducted at locations 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.

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.

Schedule, Deadlines, and Budget

Applications Due	2:00 pm (PDT/PST) on November 30, 2022
Presidential Review and Approval	Approximately 14 days post submission
Bridges Meetings Budget	Up to $180,000 for all eligible costs
Bridges Meetings Scheduling Window	May-July 2023
Meeting Length	Up to 2 days

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Application Review Information

What is the process for evaluating an application?

Pre-submission Consultation

In accordance with CIRM's mission through this funding mechanism, the Institute 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 its 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.

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? Has the applicant organization outlined a plan to conduct outreach and recruit qualified persons for the conference who are representative of the diverse California population?

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.)

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, November 30th, 2022.

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**. "Key Personnel" means (i) the principal investigator or program director; or (ii) any other person, including an independent consultant or an employee

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of a Subcontractor or Partner, 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).

2. **Budget.** Provide all budget information requested in the budget section of the Application Information Form.

All allowable costs for research grants are detailed in the CIRM Grants Administration Policy.

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 and per diem or subsistence allowances for the organizers, attendees and speakers and other costs
- Hotel room charges and fees (overnight accommodations for CIRM staff and speakers)
- 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) not related to travel conference services
- 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; honoraria for speakers; 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. Describe your proposed plan: how you would coordinate with CIRM and describe a proposed agenda for the

conference to showcase the Bridges program, including likely sessions highlighting the interns' research, career development, general scientific research, or other segments you envision at this time. <u>Please include a proposed agenda in the uploads section</u>.

4. Experience and Track Record. Do the applicant organization and Program Director have the appropriate experience to manage and perform the proposed activities? What is your track record of managing conferences in science, medicine, biotechnology, and/or science education fields?

5. Available Resources. What resources do you have to ensure that the meeting is adequately managed and that all required core activities are carried out in a timely fashion? Can you appoint an appropriate team that will collaborate effectively with CIRM to understand needs, implement tasks, and manage the process?

6. Overall Value. Does your proposal offer a good value to CIRM by providing quality events management services for a reasonable price that is commensurate with use of California public funds? Are your proposed costs appropriately justified?

7. Diversity, Equity and Inclusion Plan.

- How the conference will promote diversity, equity, and inclusion in its development and implementation;
- How the applicant organization will conduct outreach and recruit qualified persons for the conference who are representative of the diverse California population, including, for example, speakers 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.

Because CIRM is prohibited from taking race, ethnicity, national origin and gender into account in making grant decisions, applicants should refrain from focusing exclusively on race, ethnicity, national origin, or gender in describing the applicant organization personnel.

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 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 information about this RFA or the review process:

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Definitions

"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".

"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.

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 http://www.cirm.ca.gov/reg/default.asp.

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