



# Request for Proposals: Online Conference Registration System

## Contents

Summary .....	2
Background .....	2
Eligibility .....	2
Anticipated RFP Schedule .....	2
Contact for Questions and Submissions .....	3
Response Submittal .....	3
Confirmation of Intent to Respond.....	3
Final Response .....	4
Award.....	4
Term of Project .....	4
Evaluation Team .....	4
Conflict of Interest .....	4
Evaluation Criteria.....	4
Evaluation Process .....	5
Post-Evaluation Procedures.....	5
Conditions of Award Acceptance.....	5
Proposal – Required Submissions .....	6
Response to Questions .....	6
Additional Information and Deadlines for Application Submission.....	11
Appendix A: Expectations .....	12
Appendix B: Minimum Requirements.....	13
Appendix C: Score Card.....	16

## Summary

The Association of Public Health Laboratories (APHL) is seeking proposals from qualified vendors for the design, development, and implementation of a robust and comprehensive event management technology system, including online conference registration, abstract management, continuing education management, speaker, exhibitor and sponsor management, event website creation, event marketing, appointment setting, mobile app and virtual meeting capabilities. The purpose of this system is to facilitate a seamless process for attendees, speakers, sponsors, and exhibitors to submit and obtain event information. The system should be user-friendly, scalable, secure, and easily customizable.

## Background

The Association of Public Health Laboratories (APHL) works to strengthen laboratory systems serving the public's health in the United States and globally. APHL represents state and local governmental health laboratories in the United States; this includes public health, agricultural, environmental and other related laboratories. Its members, known collectively as "public health laboratories," monitor, detect and respond to health threats. Our conferences bring together professionals, experts, and thought leaders, with attendees ranging from interns and post-doc fellows to late-career thought leader experts, including from over 30 countries. We aim to provide a high-quality registration experience to ensure smooth event management and positive user interaction across all of the generations and demographics in our audience.

## Eligibility

Eligible entities include all US online conference registration systems.

The eligible applicant must be able to contract directly with APHL or have an existing relationship with a third-party organization that can contract directly with APHL. Acceptance of the award means agreement with the compensation structure and amounts agreed upon with the awardee and APHL.

Recipients must be legally able to contract within the United States and not be disbarred or prohibited from contracting with businesses or the federal government.

Specific expectations regarding the methodologies to be used are outlined in [Appendix A: Expectations](#).

All applicants are required to agree to the following minimum requirements as outlined in [Appendix B: Minimum Requirements](#)

## Anticipated RFP Schedule

Date	Assignment	Details
12/5/2024	APHL issues RFP	APHL procurement site <a href="http://www.aphl.org/rfp">www.aphl.org/rfp</a>

Will be scheduled if needed	Informational teleconference to answer any questions (optional)	Join Zoom Meeting: TBD  One tap mobile: TBD  Meeting ID: TBD Passcode: TBD
11/20/2025	Required Letter of Intent Due to APHL by 5:00 pm EST	Send an email to Jennifer.crouse@aphl.org
12/5/2025	RFP Responses Due by 5:00 pm EST	Submit proposal including exhibits via email to Jennifer.crouse@aphl.org
12/8/2025	Proposal Review Completed (estimated date)	
12/15/2025	Follow-up interviews and updated proposals due (if needed)	
12/18/2025	Final Review completed and awardees notified (estimated date)	
1/5/2026	Estimated contract start date	
1/5/2027	Estimated contract end date (Note: APHL is unable to sign auto-renewal clauses)	

APHL will communicate any modification to this anticipated schedule on APHL’s procurement website ([www.aphl.org/rfp](http://www.aphl.org/rfp)) and via an email blast to public health laboratories (PHLs) if applicable.

## Contact for Questions and Submissions

Please submit any questions via email to Jennifer.crouse@aphl.org.

## Response Submittal

### Confirmation of Intent to Respond

APHL requires that prospective applicants submit a brief email statement indicating an intent to submit a proposal. APHL must receive this email by no later than **5:00 pm EST**, on the due date. To allow for appropriate review process planning, **a letter of intent is required for consideration.**

## Final Response

APHL must receive complete responses by **5:00 pm EST**, on the due date. Please see [Proposal- Required Submissions](#) section for items that must be included in the completed proposal.

APHL will send an email acknowledging the receipt of your application; if you do not receive an acknowledgement within 2 business days, please email the RFP point of contact to confirm receipt.

## Award

Awarded recipient will be notified by email.

## Term of Project

The project term will be as indicated in the [Anticipated Project Schedule](#).

Click or tap here to enter text.

## Evaluation Team

APHL staff, led by the Conferences & Events team, will conduct an initial review of all proposals for completeness.

Any incomplete application on the proposal due date specified in [Anticipated RFP Schedule](#) section above will not be considered and will not receive a formal evaluation.

## Conflict of Interest

APHL will ask potential reviewers to complete and sign APHL's **Conflict of Interest Disclosure Statement** in order to disclose any real or perceived conflict of interest prior to the start of the evaluation process. Reviewers will have to affirm that they have no conflict of interest that would preclude an unbiased and objective review of the proposals received. APHL will not select reviewers with a perceived or potential conflict of interest.

## Evaluation Criteria

The evaluation team will evaluate proposals based on responses to the questions in the [Proposal – Required Submissions](#) section and will give a numeric score of up to 100 maximum points based on the scorecard template in [Appendix C](#).

## Evaluation Process

The evaluation team will conduct the review via a combination of email communication between APHL's representative and the members of the evaluation team, or among the evaluation team members and teleconference and/or webinar evaluation sessions. APHL's representative will coordinate the review process and the evaluation sessions.

The reviewers may request follow-up interviews with all or some of the applicants and, following these interviews, may request supplemental information on an applicant's proposal. The evaluation team will use these interviews and any supplemental information to clarify an applicant's capacity or experience in one or more of the evaluation criteria, or to explain other information contained in an applicant's proposal.

There will be no formal evaluation performed by a member of APHL staff. In cases where all other evaluation criteria are substantially similar, APHL will have the ability to advise the evaluation team on selections that would provide geographical representation or otherwise diversify APHL's funding allocations. In addition, the evaluation team may receive documentation from APHL staff on an applicant's past performance in other capacities as part of the evaluation criteria.

## Post-Evaluation Procedures

APHL staff will notify the selected applicant(s) within ten business days of the completion of the evaluation and will post the names of the recipient(s) to APHL's procurement website, [www.aphl.org/rfp](http://www.aphl.org/rfp), within three business days of the applicant's acceptance of the award. Unsuccessful applicants will receive notification of these results by e-mail within thirty business days after the name of the selected awardee is posted.

All applicants will be entitled to utilize APHL's RFP Appeals Process to formulate a protest regarding alleged irregularities or improprieties during the procurement process. Specific details of this policy are located on the procurement [website](#).

## Conditions of Award Acceptance

The eligible applicant must be able to contract directly with APHL or have an existing relationship with a third-party organization that can contract directly with APHL. Applicants must agree to comply with expectations outlined in [Appendix A](#). Acceptance of the award means agreement to the compensation structure and amounts agreed upon with the awardee and APHL.

Awardees must be able to obtain a SAM UEI if they do not already have one. A Unique Entity Identifier (UEI) is a number issued by the System for Award Management (SAM) to identify businesses and other

entities that do business with the federal government. Any **entity** that wishes to do business with the federal government and who will receive direct federal funds (or an entity that will act as a sub-awardee or subcontractor and will receive federal funds through the prime recipient) must have a UEI number issued via [sam.gov](https://sam.gov). In certain circumstances, the entity will also be required to have a valid registration on SAM.gov. **Individuals** are not required to have a SAM UEI or be registered in SAM.gov.

## Proposal – Required Submissions

An interested applicant must submit both a letter of intent to apply and a proposal. Applications must comply with submission requirements set out in the [Additional Information and Deadlines for Application Submission](#) below. A complete proposal will include the following items:

- **A completed and signed copy of [Appendix B](#),**  
*Note: If you cannot respond “yes” to each of the minimum requirements, you do not meet the minimum qualifications required to apply for this award.*
- **Responses to Questions (below)**
  - Responses should be limited to no more than ten (10) single spaced pages (font size ≥ 11pt, 1 inch margins)
  - The proposal should include responses to the questions below, including each aspect of the question. The proposal should indicate what question is being answered.
- **A letter of support from your institution’s IT department:**
  - a. Confirming your commitment to maintain connectivity to the AIMS S3 Utility/SDK environment with the support of a designated IT staff member **OR**
  - b. Confirming your ability to establish connectivity to the AIMS S3 Utility/SDK environment with the support of a designated IT staff member

## Response to Questions

The online conference registration system should meet the following requirements:

### Core Features

- **User Registration**
  - User profiles for attendees, speakers, sponsors, exhibitors, and travel organizers.
  - Ability to send registration-type-specific link to prospective registrants as needed.
  - Self-service portal for users to manage their registration details.
  - Tiered registration options (early bird, regular, VIP, etc.).
  - Conditional question capabilities with visibility paths for different registration types.
  - Group and individual registrations and capability for member/non-member rates when organizations are members, not just individuals.

- Badge generation with QR code.
- Email confirmations, receipts, and reminders.
- Ability to offer discount codes and direct links to special rated registration pathways.
- **Payment Gateway Integration**
  - Support for multiple payment methods (credit/debit cards, (or PayPal as a fallback), ACH).
  - Invoicing, receipts and statements generation.
  - Payment tracking and reporting, including reports with identification of each purchase within an invoice and dollar amount.
  - Ability to initiate and track refunds.
- **Event Information Management**
  - Website build capability with plugins for video content, variety of webpage layout options, WYSIWYG design tools.
  - Conference session schedule.
  - Integration with calendar applications (Google Calendar, Outlook, etc.).
  - Ability to collect photos/videos for contests.
- **Abstract/Speaker Management**
  - Call for Abstracts/Posters capability, managing submissions and selection notifications.
  - Speaker registration/bio/photo/speaker agreement/travel details that flow into website, mobile app, and are exportable.
  - Mobile app for attendees that allows for submission/certificate download for continuing education credits and allows the user to type/write and easily export or print notes for each session
  - Ability to collect multiple types of agreements (two 'paper' agreements for our CEU applications) and download them.
  - Ability for speakers to submit presentation slides.
  - Ability for poster presenters to upload presentations and submit poster PDFs.
  - Ability to have a primary contact submitter for abstracts.
  - Ability to view posters.

- Ability to send mass emails to speakers/poster presenters with tasks that need to be completed (submitting agreements, updating bios/photos, uploading PPTs. etc.) and a way to verify that these tasks have been completed
- Ability to collect speaker slides PPTs and provide access to AV team, including a mechanism to allow speakers to edit their presentations while onsite
- For the conference session schedule, ensuring that we can create a schedule based on our needs (i.e. for the symposium we 'nest' presentations under sessions; I think annual conference does it differently).
- Ability for submitters to submit abstracts under certain topics (sub-topics would also be a nice add on and something that is possible with Cadmium)
- Ability to ask customizable questions to submitters
- Ability to have different submission types: orals, roundtables, posters
- Ability to add reviewers and assign select abstracts to select reviewers
- Ability for reviewers to review abstracts based on our criteria
- Ability to download reports to show review summaries (submitter information, abstract type, topic, title and summary, recommendations from reviewers, comments, individual reviewer scores, average scores)
- Ability to send emails from platform inviting reviewers
- Accepted abstracts should easily integrate with other aspects of the platform (submitter information, abstract text)
- Ease of use for submitters and reviewers: I have always received good feedback about the current abstract management system from both
- **Survey Evaluations/CEU Management**
  - Ability to create overall evaluations
  - Ability to create session evaluations with learning objectives for each session
  - Ability to only make certain sessions eligible for credit
  - Ability for attendees to download certificates (PACE but also a certificate of attendance)
  - Ability to download reports:
    - Overall evaluations results
    - Session evaluation results
    - General user reports

- Requirement of a verification code in order to access the evaluations, as it ensures that they have stayed for the session to the end. Since we do not have people 'sign in' before each session, this type of verification is important.
- **Corporate Opportunities Management**
  - Booth selection and management.
  - Custom sponsorship packages and options with photos.
  - A la carte advertising and sponsorship options, to include sponsored sessions and speaking opportunities, and related speaker agreements.
  - Private meeting room space.
- **Customizable Forms**
  - Ability to create customizable registration forms.
  - Option to add fields for dietary restrictions, special accommodations, and session or track preferences.
  - Conditional questions, including items such as sub-questions under social events for entrée selections, golf index and club rental for golf tournaments, etc.

#### **User Interface**

- Single Sign-on Capability that is compatible with MC Trade CRM.
- Intuitive, responsive design optimized for both desktop and mobile users.
- Multilingual support.
- User-friendly navigation for attendees and administrators.
- Accessibility features for a variety of abilities.

#### **Data and Reporting**

- Detailed attendee reports (registrations, payments, session preferences).
- Exportable data to Excel, CSV, and other formats.
- Analytics on registrations (by type, date, region, etc.).
- Ability to create ad hoc reports/queries as well as controls on the created reports/queries on who can access and/or edit.
- Accounting Reports to include itemized transactions that are exportable to Excel/CSV, with below information:
  - Debit/Credits entries
  - General ledger accounts
  - Transaction amounts

- Associated programs/meetings

### **Security & Compliance**

- GDPR compliance and data privacy.
- Secure payment processing (PCI DSS compliant).
- User authentication and role-based access control.

### **Integration**

- Integration with MC Trade CRM system, including SSO for up to 10 fields, and ability for users to add to their profiles and ideally report back to MC Trade with vendor-supported programming.
- Integration with virtual event platforms (e.g., Zoom, Microsoft Teams).
- Integration with mobile app that requires ONE app installment per person regardless of the number of future events.
- Integration with on-site badge fulfillment partner and lead retrieval for on-demand badge printing of new onsite registrations.
- Integration with Oracle and Workday.
- API access for custom integrations.
- If not contained within system, integration with exhibit sales/online exhibit floor plan platform.

### **Additional Features**

- Hosted, cloud-based solution.
- Ability to provide both a production and development environment.
- Ability to live stream presentations and provide portal to recorded sessions.
- Integration with our APHL Learning Center, to include their continuing education certificates and reports.
- Hybrid virtual capabilities for content, posters, exhibitors and sponsors.
- Onsite registration and check-in capabilities with QR codes.
- Ability to generate name badges and print on demand.
- Post-event survey integration.
- Scalable to events from 10 to 10,000.
- Single license fee amount for unlimited number of events.

## Additional Information and Deadlines for Application Submission

Applicants must direct all questions to the [Contact for Questions and Submissions](#). APHL will post all questions received, together with the answers provided, to APHL's procurement website associated with the specific RFP ([www.aphl.org/rfp](http://www.aphl.org/rfp)).

To allow for appropriate review process planning, a **letter of intent is required for consideration**. Applicants should submit letters by the due date listed in the [Anticipated RFP Schedule](#) to the [Contact for Questions and Submissions](#).

Applications are due to the [Contact for Questions and Submissions](#) by **5:00 pm EST** on the due date listed in the [Anticipated RFP Schedule](#). APHL will send an email acknowledging the receipt of your application. If you do not receive an acknowledgement within two (2) business days, reach out to the [Contact for Questions and Submissions](#) to confirm receipt.

**APHL may hold an optional teleconference** on the time and date listed in the [Anticipated RFP Schedule](#). The purpose of this call will be to provide a brief overview of the project and to allow potential applicants to ask questions. Please come with questions prepared.

**Teleconference Call-in Information is included in the [Anticipated RFP Schedule](#), or please reach out to the [Contact for Questions and Submissions](#) no later than three business days prior to the teleconference to receive the calendar invitation.**

**[Appendices on following pages.]**

## Appendix A: Expectations

### Proposal Submission Requirements

Proposals must include the following sections:

#### 1. Executive Summary

Provide a brief summary of the vendor's qualifications, relevant experience, and a high-level overview of the proposed solution.

#### 2. Company Background

- Company overview and history.
- Relevant experience in developing conference registration systems.
- Key personnel and their experience in similar projects.
- Data security measures and server hosting description.

#### 3. Technical Proposal

- Description of the proposed system and its features.
- Proposed development approach, including timelines and milestones.
- System architecture and technologies used.

#### 4. Implementation Plan

- Detailed project plan with phases, milestones, and delivery dates.
- Training and support offered during and after implementation.
- Data migration strategy (if applicable).

#### 5. Cost Proposal

- Breakdown of costs, including:
  - Initial setup or development costs.
  - Licensing and subscription fees (if any).
  - Support and maintenance fees.
  - Optional features and associated costs.

#### 6. References

Provide at least three references of clients who have implemented similar systems, including contact information.

## Appendix B: Minimum Requirements

Please review and respond to each of the minimum requirements below. By signing this agreement you are affirming that your organization can meet each of the minimum requirements described.

YES	NO	MINIMUM REQUIREMENT
<input type="checkbox"/>	<input type="checkbox"/>	<p><b>User Registration</b></p> <ul style="list-style-type: none"> <li>User profiles for attendees, speakers, sponsors, exhibitors, and travel organizers.</li> <li>Ability to send registration-type-specific link to prospective registrants as needed.</li> <li>Self-service portal for users to manage their registration details.</li> <li>Tiered registration options (early bird, regular, VIP, etc.).</li> <li>Conditional question capabilities with visibility paths for different registration types.</li> <li>Group and individual registrations and capability for member/non-member rates when organizations are members, not just individuals.</li> <li>Badge generation with QR code.</li> <li>Email confirmations, receipts, and reminders.</li> <li>Ability to offer discount codes and direct links to special rated registration pathways.</li> </ul> <p><b>Payment Gateway Integration</b></p> <ul style="list-style-type: none"> <li>Support for multiple payment methods (credit/debit cards, (or PayPal as a fallback), ACH).</li> <li>Invoicing, receipts and statements generation.</li> <li>Payment tracking and reporting, including reports with identification of each purchase within an invoice and dollar amount.</li> <li>Ability to initiate and track refunds.</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Event Information Management</b></p> <ul style="list-style-type: none"> <li>Website build capability with plugins for video content, variety of webpage layout options, WYSIWYG design tools.</li> <li>Conference session schedule.</li> <li>Integration with calendar applications (Google Calendar, Outlook, etc.).</li> <li>Ability to collect photos/videos for contests.</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Abstract/Speaker Management</b></p> <ul style="list-style-type: none"> <li>Call for Abstracts/Posters capability, managing submissions and selection notifications.</li> <li>Speaker registration/bio/photo/speaker agreement/travel details that flow into website, mobile app, and are exportable.</li> <li>Mobile app for attendees that allows for submission/certificate download for continuing education credits and allows the user to type/write and easily export or print notes for each session</li> <li>Ability to collect multiple types of agreements (two 'paper' agreements for our CEU applications) and download them.</li> <li>Ability for speakers to submit presentation slides.</li> <li>Ability for poster presenters to upload presentations and submit poster PDFs.</li> <li>Ability to have a primary contact submitter for abstracts.</li> <li>Ability to view posters.</li> </ul>

		<p>Ability to send mass emails to speakers/poster presenters with tasks that need to be completed (submitting agreements, updating bios/photos, uploading PPTs. etc.) and a way to verify that these tasks have been completed</p> <p>Ability to collect speaker slides PPTs and provide access to AV team, including a mechanism to allow speakers to edit their presentations while onsite</p> <p>For the conference session schedule, ensuring that we can create a schedule based on our needs (i.e. for the symposium we 'nest' presentations under sessions; I think annual conference does it differently).</p> <p>Ability for submitters to submit abstracts under certain topics (sub-topics would also be a nice add on and something that is possible with Cadmium)</p> <p>Ability to ask customizable questions to submitters</p> <p>Ability to have different submission types: orals, roundtables, posters</p> <p>Ability to add reviewers and assign select abstracts to select reviewers</p> <p>Ability for reviewers to review abstracts based on our criteria</p> <p>Ability to download reports to show review summaries (submitter information, abstract type, topic, title and summary, recommendations from reviewers, comments, individual reviewer scores, average scores)</p> <p>Ability to send emails from platform inviting reviewers</p> <p>Accepted abstracts should easily integrate with other aspects of the platform (submitter information, abstract text)</p> <p>Ease of use for submitters and reviewers: I have always received good feedback about the current abstract management system from both</p>
<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Survey Evaluations/CEU Management</b></p> <p>Ability to create overall evaluations</p> <p>Ability to create session evaluations with learning objectives for each session</p> <p>Ability to only make certain sessions eligible for credit</p> <p>Ability for attendees to download certificates (PACE but also a certificate of attendance)</p> <p>Ability to download reports:</p> <p>Overall evaluations results</p> <p>Session evaluation results</p> <p>General user reports</p> <p>Requirement of a verification code in order to access the evaluations, as it ensures that they have stayed for the session to the end. Since we do not have people 'sign in' before each session, this type of verification is important.</p>
<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Corporate Opportunities Management</b></p> <p>Booth selection and management.</p> <p>Custom sponsorship packages and options with photos.</p> <p>A la carte advertising and sponsorship options, to include sponsored sessions and speaking opportunities, and related speaker agreements.</p> <p>Private meeting room space.</p>
<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Customizable Forms</b></p> <p>Ability to create customizable registration forms.</p> <p>Option to add fields for dietary restrictions, special accommodations, and session or track preferences.</p>
<input type="checkbox"/>	<input type="checkbox"/>	<p><b>User Interface</b></p> <p>Single Sign-on Capability that is compatible with MC Trade CRM.</p> <p>Intuitive, responsive design optimized for both desktop and mobile users.</p> <p>Multilingual support.</p>

		User-friendly navigation for attendees and administrators. Accessibility features for a variety of abilities.
<input type="checkbox"/>	<input type="checkbox"/>	<b>Data and Reporting</b> Detailed attendee reports (registrations, payments, session preferences). Exportable data to Excel, CSV, and other formats. Analytics on registrations (by type, date, region, etc.). Ability to create ad hoc reports/queries as well as controls on the created reports/queries on who can access and/or edit. Accounting Reports to include itemized transactions that are exportable to Excel/CSV, with below information: Debit/Credits entries, General ledger accounts, Transaction amounts, and Associated programs/meetings
<input type="checkbox"/>	<input type="checkbox"/>	<b>Security &amp; Compliance</b> GDPR compliance and data privacy. Secure payment processing (PCI DSS compliant). User authentication and role-based access control.
<input type="checkbox"/>	<input type="checkbox"/>	<b>Integration</b> Integration with MC Trade CRM system, including SSO for up to 10 fields, and ability for users to add to their profiles and ideally report back to MC Trade with vendor-supported programming. Integration with virtual event platforms (e.g., Zoom, Microsoft Teams). Integration with mobile app that requires ONE app installment per person regardless of the number of future events. Integration with on-site badge fulfillment partner and lead retrieval for on-demand badge printing of new onsite registrations. Integration with Oracle and Workday. API access for custom integrations. If not contained within system, integration with exhibit sales/online exhibit floor plan platform.
<input type="checkbox"/>	<input type="checkbox"/>	<b>Additional Features</b> Hosted, cloud-based solution. Ability to provide both a production and development environment. Ability to live stream presentations and provide portal to recorded sessions. Integration with our APHL Learning Center, to include their continuing education certificates and reports. Hybrid virtual capabilities for content, posters, exhibitors and sponsors. Onsite registration and check-in capabilities with QR codes. Ability to generate name badges and print on demand. Post-event survey integration. Scalable to events from 10 to 10,000. Single license fee amount for unlimited number of events.

On behalf of the applicant organization, I agree that the applicant organization is able to meet the minimum requirements necessary to apply for this award as outlined above.

Signature: \_\_\_\_\_

Date:

Printed Name: \_\_\_\_\_

## Appendix C: Score Card

The following table is a copy of the score card that will be used to evaluate RFP responses.

Category/Question	Maximum Value	Score	Comments (REQUIRED)
<p><b>User Registration</b></p> <ul style="list-style-type: none"> <li>User profiles for attendees, speakers, sponsors, exhibitors, and travel organizers.</li> <li>Ability to send registration-type-specific link to prospective registrants as needed.</li> <li>Self-service portal for users to manage their registration details.</li> <li>Tiered registration options (early bird, regular, VIP, etc.).</li> <li>Conditional question capabilities with visibility paths for different registration types.</li> <li>Group and individual registrations and capability for member/non-member rates when organizations are members, not just individuals.</li> <li>Badge generation with QR code.</li> <li>Email confirmations, receipts, and reminders.</li> <li>Ability to offer discount codes and direct links to special rated registration pathways.</li> </ul> <p><b>Payment Gateway Integration</b></p> <ul style="list-style-type: none"> <li>Support for multiple payment methods (credit/debit cards, (or PayPal as a fallback), ACH).</li> <li>Invoicing, receipts and statements generation.</li> <li>Payment tracking and reporting, including reports with identification of each purchase within an invoice and dollar amount.</li> <li>Ability to initiate and track refunds.</li> </ul> <p><b>Ideal (16-20 points):</b> Click or tap here to enter text.</p> <p><b>Adequate (11-15 points):</b> Click or tap here to enter text.</p> <p><b>Limited (5-10 points):</b> Click or tap here to enter text.</p> <p><b>Inadequate (0-4 points):</b> Click or tap here to enter text.</p>	20		
<p><b>Event Information Management</b></p> <ul style="list-style-type: none"> <li>Website build capability with plugins for video content, variety of webpage layout options, WYSIWYG design tools.</li> <li>Conference session schedule.</li> <li>Integration with calendar applications (Google Calendar, Outlook, etc.).</li> </ul>	5		

<ul style="list-style-type: none"> <li>• Ability to collect photos/videos for contests.</li> </ul> <p><b>High (4-5 points):</b> Click or tap here to enter text.</p> <p><b>Moderate (2-3-points):</b> Click or tap here to enter text.</p> <p><b>Low (1 point):</b> Click or tap here to enter text.</p> <p><b>No Experience (0 points):</b> Applicant does not demonstrate internal subject matter expertise in this area.</p>			
<p><b>Abstract/Speaker Management</b></p> <ul style="list-style-type: none"> <li>• Call for Abstracts/Posters capability, managing submissions and selection notifications.</li> <li>• Speaker registration/bio/photo/speaker agreement/travel details that flow into website, mobile app, and are exportable.</li> <li>• Mobile app for attendees that allows for submission/certificate download for continuing education credits and allows the user to type/write and easily export or print notes for each session</li> <li>• Ability to collect multiple types of agreements (two 'paper' agreements for our CEU applications) and download them.</li> <li>• Ability for speakers to submit presentation slides.</li> <li>• Ability for poster presenters to upload presentations and submit poster PDFs.</li> <li>• Ability to have a primary contact submitter for abstracts.</li> <li>• Ability to view posters.</li> <li>• Ability to send mass emails to speakers/poster presenters with tasks that need to be completed (submitting agreements, updating bios/photos, uploading PPTs. etc.) and a way to verify that these tasks have been completed</li> <li>• Ability to collect speaker slides PPTs and provide access to AV team, including a mechanism to allow speakers to edit their presentations while onsite</li> <li>• For the conference session schedule, ensuring that we can create a schedule based on our needs (i.e. for the symposium we 'nest' presentations under sessions; I think annual conference does it differently).</li> <li>• Ability for submitters to submit abstracts under certain topics (sub-topics would also be a nice add on and something that is possible with Cadmium)</li> <li>• Ability to ask customizable questions to submitters</li> </ul>	15		

<ul style="list-style-type: none"> <li>• Ability to have different submission types: orals, roundtables, posters</li> <li>• Ability to add reviewers and assign select abstracts to select reviewers</li> <li>• Ability for reviewers to review abstracts based on our criteria</li> <li>• Ability to download reports to show review summaries (submitter information, abstract type, topic, title and summary, recommendations from reviewers, comments, individual reviewer scores, average scores)</li> <li>• Ability to send emails from platform inviting reviewers</li> <li>• Accepted abstracts should easily integrate with other aspects of the platform (submitter information, abstract text)</li> <li>• Ease of use for submitters and reviewers: I have always received good feedback about the current abstract management system from both</li> </ul> <p><b>High (12-15 points):</b>  <b>Moderate (8- 11 points):</b>  <b>Low (4-7 points):</b>  <b>No /Unclear (0-3 points):</b></p>			
<p><b>Survey Evaluations/CEU Management</b></p> <ul style="list-style-type: none"> <li>• Ability to create overall evaluations</li> <li>• Ability to create session evaluations with learning objectives for each session</li> <li>• Ability to only make certain sessions eligible for credit</li> <li>• Ability for attendees to download certificates (PACE but also a certificate of attendance)</li> <li>• Ability to download reports:</li> <li>• Overall evaluations results</li> <li>• Session evaluation results</li> <li>• General user reports</li> <li>• Requirement of a verification code in order to access the evaluations, as it ensures that they have stayed for the session to the end. Since we do not have people 'sign in' before each session, this type of verification is important.</li> </ul> <p><b>Corporate Opportunities Management</b></p> <ul style="list-style-type: none"> <li>• Booth selection and management.</li> <li>• Custom sponsorship packages and options with photos.</li> </ul>	20		

- A la carte advertising and sponsorship options, to include sponsored sessions and speaking opportunities, and related speaker agreements.
- Private meeting room space.

**High (16-20 points):**

**Moderate (11-15 points):**

**Low (5-10 points):**

**No /Unclear (0-4 points):**

**Customizable Forms**

- Ability to create customizable registration forms.
- Option to add fields for dietary restrictions, special accommodations, and session or track preferences.
- Conditional questions, including items such as sub-questions under social events for entrée selections, golf index and club rental for golf tournaments, etc.

**User Interface**

- Single Sign-on Capability that is compatible with MC Trade CRM.
- Intuitive, responsive design optimized for both desktop and mobile users.
- Multilingual support.
- User-friendly navigation for attendees and administrators.
- Accessibility features for a variety of abilities.

**Data and Reporting**

- Detailed attendee reports (registrations, payments, session preferences).
- Exportable data to Excel, CSV, and other formats.
- Analytics on registrations (by type, date, region, etc.).
- Ability to create ad hoc reports/queries as well as controls on the created reports/queries on who can access and/or edit.
- Accounting Reports to include itemized transactions that are exportable to Excel/CSV, with below information:
  - Debit/Credits entries
  - General ledger accounts
  - Transaction amounts
  - Associated programs/meetings

**Security & Compliance**

- GDPR compliance and data privacy.
- Secure payment processing (PCI DSS compliant).
- User authentication and role-based access control.

**Ideal (20-25 points):**  
**Adequate (11-19 points):**  
**Inadequate (0-10 points):**

**Integration**

- Integration with MC Trade CRM system, including SSO for up to 10 fields, and ability for users to add to their profiles and ideally report back to MC Trade with vendor-supported programming.
- Integration with virtual event platforms (e.g., Zoom, Microsoft Teams).
- Integration with mobile app that requires ONE app installment per person regardless of the number of future events.
- Integration with on-site badge fulfillment partner and lead retrieval for on-demand badge printing of new onsite registrations.
- Integration with Oracle and Workday.
- API access for custom integrations.
- If not contained within system, integration with exhibit sales/online exhibit floor plan platform.

**Additional Features**

- Hosted, cloud-based solution.
- Ability to provide both a production and development environment.
- Ability to live stream presentations and provide portal to recorded sessions.
- Integration with our APHL Learning Center, to include their continuing education certificates and reports.
- Hybrid virtual capabilities for content, posters, exhibitors and sponsors.
- Onsite registration and check-in capabilities with QR codes.
- Ability to generate name badges and print on demand.
- Post-event survey integration.
- Scalable to events from 10 to 10,000.
- Single license fee amount for unlimited number of events.

**Ideal (12-15):**  
**Adequate (8-11):**  
**Limited (4-7):**  
**Inadequate (0-3):**

<b>TOTAL SCORE</b>	<b>100</b>		