Request for proposal  
IAS Educational Fund meetings:  
Virtual Platform

Summary:
This document has been created to detail the scope and needs of a virtual interactive platform that will meet the set-up, deployment and management requirements for the delivery of IAS Educational Fund regional meetings.

Proposal submission deadline: 17 December 2020

- No proposals will be considered after the appointed deadline.
- An electronic version of the proposal is required.
- Incomplete proposals will not be considered.

Submit your complete proposal to:
IAS – the International AIDS Society
Attention: Lauranne Botti
Avenue de France 23
CH-1202 Geneva, Switzerland

Email: lauranne.botti@iasociety.org

IAS Educational Fund
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1. General

IAS – the International AIDS Society – leads collective action on every front of the global HIV response through its membership base, scientific authority and convening power. Founded in 1988, the IAS is the world’s largest association of HIV professionals, with members in more than 170 countries. Working with its members, the IAS advocates and drives urgent action to reduce the impact of HIV. The IAS is also the steward of the world’s most prestigious HIV conferences: the International AIDS Conference, the IAS Conference on HIV Science, and the HIV Research for Prevention Conference.

The IAS promotes and invests in HIV advocacy and research on key issue areas through our strategic programmes, initiatives, and campaigns that advocate for urgent action to reduce the global impact of HIV, including increased investment in HIV cure research; optimizing treatment and care for infants, children and adolescents with HIV in resource-limited settings; preventing and treating HIV-related co-infections; and expanding access to prevention, treatment and care for key populations vulnerable to HIV acquisition – such as men who have sex with men, people who inject drugs, sex workers and transgender people – including protecting their human rights by combatting punitive laws and discriminatory policies. For more information, visit www.iasociety.org.

To make scientific fora more accessible to our members, their communities and the HIV workforce, the IAS convenes smaller scientific symposia and workshops around the world targeted at healthcare workers, researchers, advocates, and policymakers. Through these smaller scientific meetings, the IAS Educational Fund provides access to the latest science and opportunities to question how that information impacts local epidemics in symposia and workshops on translating HIV science into practice, and provides guidance on how to write manuscripts in scientific publishing workshops. To build these meetings, the IAS partners closely with local academia, research institutions, and civil society organizations who ensure the discussions are adapted and contextualized for the locations where in-country partners are based. (More information on the IAS Educational Fund and regional meetings are available on the website: http://www.iasociety.org/educationalfund and http://www.iasociety.org/IAS-Educational-Fund/IAS-Educational-Fund-Meetings.)

Throughout the course of 2020, the IAS Educational Fund team has used Zoom as a platform to conduct webinars and encourage attendee participation through chat and Q&A boxes. Adapting in-person IAS Educational Fund meetings to multiple online events on a tailored, virtual platform will require networking and engagement tools that will increase the quality of the user experience and encourage participation in virtual meetings that go beyond Zoom limitations.

The IAS Educational Fund team will select the virtual platform based on licence and set-up fees (for example, development, interfaces and system integrations, deployment, testing, etc.), the ability and availability of the provider to manage the platform and deliver virtual meeting requirements during the events (such as offering networking and engagement tools for users, pre-recording presentations, streaming pre-recording presentations live and running live sessions), the provider’s capacity to develop and upload content to keep the virtual platform up-to-date, and the frequency and reliability of data transference to the IAS for analytics that meet the IAS Educational Fund’s donor requirements.

The virtual platform should be intuitive and easy to use in low and high bandwidth settings, for a wide demographic, allowing the user to easily attend and participate in the various online sessions and activities.

The supplier is responsible for providing a virtual meeting solution for the IAS Educational Fund meetings taking place throughout Q1 and Q2 of 2021 (with the possibility to extend to meetings in Q3/4 2021 depending on the evolution of the COVID-19 pandemic).
The supplier shall provide a detailed cost breakdown based on the scope of the project defined in this RFP, including any licence and set-up fees (for example, development, interfaces and system integrations, deployment, testing, etc.), managing the platform and virtual meeting requirements during the event period, hosting the content, transferring data to the IAS and any other services and requirements mentioned in this document.

All prices should be given in USD and must be final 2021 prices.

The proposal should be based on the scope defined in the RFP (this document). The supplier should clearly specify what platform would be used and what functionalities this platform provides. If a part of the service cannot be provided or will be performed differently, please clearly specify this in your proposal and suggest alternative solutions if possible.

Should the supplier be selected, the RFP and the proposal will constitute part of the final agreement. The final agreement will, apart from standard contractual arrangements, only contain deviations/additions/clarification from the proposal and the RFP. The final agreement will be based on the IAS’s standard agreement with suppliers.

The supplier shall work towards the virtual meeting structure and setup. As part of the proposal, the supplier should provide best practices, as well as proven and experienced methodologies that will innovate and engage attendees.

The IAS will not give out any information or share any proposals received during the bidding process. The supplier, or any subcontractor of the supplier, shall not give out any information (including this document and all containing documents) received during the bidding process to a third party without prior written consent of the IAS.
2. Overview of IAS Educational Fund activities for a virtual platform

2.1 IAS Educational Fund activities

The IAS Educational Fund requires a platform to implement regional meetings and publishing workshops that will focus on intuitiveness and simplicity (preferably 2D), since our participants are from very diverse international, cultural and professional backgrounds.

All activities relating to regional meetings and publishing workshops are open access for participants and will therefore not required a registration fee. The platform pricing structure should therefore clearly indicate pricing based on attendees and not the number of registrants.

2.1.1. Virtual platform project timeline

<table>
<thead>
<tr>
<th>IAS Educational Fund meetings</th>
<th>Jan</th>
<th>Feb</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Set up virtual platform</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Test platform</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Launch platform</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>First meeting: Southern Africa scientific symposium (English)*</td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

*the date for the first regional meeting has not been confirmed but it could take place as early as mid-February 2021*
2.1.2. Planned activities to be conducted on the virtual platform

Please note that the planned activities as outlined below are subject to change:

**Q1/Q2 2021 (From February)**

- Southern Africa scientific symposium (English)
- Philippines workshop (English) & JIAS scientific publishing workshop
- Mozambique workshop (English and Portuguese) & JIAS scientific publishing workshop

**Q3/Q4 2021 (To be confirmed if virtual or in-person depending on the COVID-19 situation)**

- Workshop/Symposium in Latin America (Spanish)
- Workshop in the MENA region (French)
- Uganda scientific symposium and workshop (English)

2.1.3. IAS Educational Fund activity formats and programmes

**Workshops – live and semi-live format**

These meetings are usually closed and focus on small audiences. Aims and targets for workshops include having around 50 participants (though we are not aiming for a limit for virtual meetings) and a programme structure that allows for greater interaction, including group work, debates, panel discussions and Q&A sessions.

**Symposia – live and semi-live format**

These meetings are planned for wider audiences and open to all HIV professionals involved in the response nationally or regionally based on where the local partner is situated. Aims and targets for symposia are to have around 200 participants, though we are not aiming for a limit of participants with the virtual format. For symposia the focus is on targeted presentations possibly pre-recorded and interactions that take place during panel discussions and Q&A sessions.

<table>
<thead>
<tr>
<th>Session type</th>
<th>Example of a Session format</th>
<th>Length</th>
<th>Analytics</th>
<th>Interactivity and other functions enabled</th>
</tr>
</thead>
</table>
| Workshop (~4 sessions per workshop – possibly on different days) | Semi-live sessions (recorded content + live parts + live Q&A) streamed at a scheduled time and available on-demand afterwards. Recorded and quality assured by the supplier. High level of interactivity is needed for the live sessions | ~60 to 90 min per session | - Number of unique views (for sessions, pages, meetings, etc.)
- Countries
- Geographic representation
- Gender
- Age
- Profession
- Organizational sector | - Chat (during session and at defined times)
- Q&A box
- Raising hands
- Different emojis
- Audio and video enabling
- Polling/voting options
- Virtual breakout rooms |
allow for group work and discussions

- Whiteboard/interactive facilitation tool
- Feedback survey

| Symposia (Multiple sessions – possibly on different times and days) | Semi-live session (recorded content + live parts + live Q&A) streamed at a scheduled time and available on-demand afterwards. Recorded and quality assured by the supplier. | ~ 60 to 90 min per session | Number of unique views (for sessions, pages, meetings, etc.)
- Countries
- Geographic representation
- Gender
- Age
- Profession
- Organizational sector | Chat (during session and at defined times)
- Q&A box
- Raising hands
- Different emojis
- Audio and video enabling
- Polling/voting options
- Feedback survey |

Clarification:
Pre-recorded content referred to above is defined as:
- Video recording of the speaker (image and audio synchronized)
  or
- PPT and video recording of the speaker (image and audio and ppt synchronized).

2.2. Analytics and statistics
All data and analytics from the virtual meetings will be sent by the virtual platform provider to the IAS – for example, statistics and raw data. A specific part of the back-office should be available for this effect. Real time statistics would be preferred.

Analytics to be collected are outlined below:

| Access | 1 - Total registered participants (by age, gender, professional category [healthcare worker, researcher, activist, etc.], and organizational category [government, NGO, funder, etc.])
2 - % & # of participants who accessed the conference (by region, sex and age group)
2.1 By day of the week
2.2 By browser
2.3 By mobile/tablet/laptop
2.4 Operating system
2.5 Median # of logins throughout the meeting (over various sessions)
2.6 Median duration on the platform throughout the meeting (over various sessions)
2.7 Median # of logins after the meeting
2.8 Median duration on the platform after the meeting
3 - Bounce rate
4 - No shows (i.e. people registered who did not attend) | Content | 5 - What % of participants (by region, sex and age group) accessed:
5.1 Top sessions (and list by total # of views) (ranking)
5.2 Median time on a session | Engagement | 6 - What % of participants (by region, sex and age group): |
2.3. Landing page

A main landing page would be needed that would include an overview of the IAS and the IAS Educational Fund, either in the form of an IAS thumbnail (2D) or visible logos that can be clicked on for further information. Documents from the IAS and links to previous IAS Educational Fund meetings should be made available on the platform.

A help desk that is accessible on the landing page is also required to address any technical issues that may arise for users.

Site Map example:

IAS Educational Fund meetings
Home (Registration redirect if no access?), IAS thumbnail (2D) & help desk/technical FAQs
Programme at a Glance
Live Channels
  Channel 1
  Channel 2: Only if several meetings are running at once or if other channels need to be used for language interpretation, otherwise only one channel will be used.
On-Demand Content
  IAS Educational Fund scholarship recipients’ material (Only accessible to IAS Educational Fund scholarship recipients)
  IAS Member material (Only accessible to IAS Members)
Archive
Sponsors
Resources
Contact Us

2.4. Interactivity and engagement

The platform must allow and encourage as much interactivity as possible during the meeting and its various sessions and activities to maximize audience engagement. This includes interaction between attendees, speakers and moderators.

Please clearly detail the interactivity, engagement and participatory features that the platform could provide, such as live chats, live poll and Q&A segments in sessions, chats for on-demand content, private and group chat and working rooms, member identification and links to the IAS Members' area, virtual hangouts, creating social walls, rapporteur reports, links to the IAS Members' Area, whiteboards etc. There should be clear benefits in engaging interactive activities that can be promoted and managed.

2.4.1. Attendee networking

IAS Educational Fund meetings provide networking opportunities as one of the benefits that attendees experience during our in-person events. In-person attendees experience the community first-hand and network naturally during the meetings, in particular with experts. Specific networking opportunities for virtual attendees to connect and exchange virtually need to be created and managed.

Please detail the networking features the platform would provide, such as private messaging, forums, appointment scheduling tools, sharing photos and contact details/virtual business cards, link with other existing platforms (such as LinkedIn, Researchgate or others), etc. The IAS Educational Fund also integrate a ‘Meet the Experts’ session, where attendees can ask
questions to experts in the field as a networking and learning exchange activity (with audio and possibly video on).

2.5. Other required add-ons and additional items

<table>
<thead>
<tr>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polling / voting</td>
<td>To engage with the participants in the session.</td>
</tr>
<tr>
<td>Moderated Q&amp;A</td>
<td>For moderators and participants to exchange questions and answers during sessions that are visible to others and encourage engagement.</td>
</tr>
<tr>
<td>Chat</td>
<td>For moderators, speakers and participants to communicate during and outside of sessions that are set with optional visibility to others.</td>
</tr>
<tr>
<td>Session rehearsal</td>
<td>Rehearsal for a semi-live or live session.</td>
</tr>
<tr>
<td>Direct link to the session</td>
<td>Direct link to the session to be shared with the co-organizer in advance of the session.</td>
</tr>
<tr>
<td>Interpretation</td>
<td>In different languages for the respective sessions (English, French, Spanish, Portuguese and Russian).</td>
</tr>
<tr>
<td>Platform translation</td>
<td>In different languages for easy and intuitive user experience.</td>
</tr>
<tr>
<td>Consent forms</td>
<td>For invited speakers and moderators to consent to being recorded and sharing their presentation materials with participants after the session.</td>
</tr>
<tr>
<td>Push notification</td>
<td>Push notification sent out via the platform to all participants logged in at that time to promote the session or next activity or to share information during the session.</td>
</tr>
<tr>
<td>Lead capture</td>
<td>When clicking on a session, the participant should be asked to (optionally) provide the contact details. Once accepted lead (contact name, organization, email, telephone, etc.) will be captured.</td>
</tr>
<tr>
<td>Donor and sponsor branding</td>
<td>The platform should include options for donors logo placement as recognition for their support to the IAS Educational Fund.</td>
</tr>
</tbody>
</table>

**Additional add-ons if possible**

| Feedback survey                                                          | Possibility to include an evaluation form to be filled out by participants in the session.     |
| CME accreditation                                                        | Provide CME accreditation certificate if attended one or more sessions.                        |
| Certificate of attendance                                                | Provide certificate of attendance if participated in one or more sessions.                     |
Business cards

For participants and speakers to exchange virtual business cards.

Sync with calendars

Participants should be able to personalize their agenda and select the activities to attend in advance of the meetings, and easily be able to add these events to their Outlook/Gmail calendars so that the time is blocked (.ics file format), and they can be reminded of the sessions in advance as well as at the time of commencement.

Additional questions to take into account in the development of the virtual platform include:

- How would the materials for the landing page ‘IAS booth’ be collected?
  - Cloud storage (OneDrive)?
  - Would all booth materials have to be collected and uploaded beforehand?
- How do links work?
  - Could they open in an iFrame (smaller frame in front of the booth) or in a separate window?
  - How would internal links function (for example to sessions, entrance hall, etc.)?
- How is restricted access based on participant classifications created (attendee, speaker, IAS team, etc.)?
- To what extent are participants who have registered for one activity able to access the platform and information available online linked to other activities? Could each individual meeting have a different access route?
- Which side platform is used for streaming semi-live and live sessions and pre-recorded/on-demand presentations (Zoom, Teams, etc.)?
- IAS branding would be need for the virtual platform access:
  - **Main Portal:** Edu.iasociety.org
  - **For meetings:** Edu.iasociety.org/meetingxxx

As part of your proposal please specify how these packages and virtual add-ons can be realized and which parts would have to be adapted based on the capabilities of your system and your standard processes.

Given your expertise in the field of virtual meetings, please present and describe any other features, services or tools that have not been mentioned throughout this RFP that you believe would be worth implementing and could add value to the final solution, especially in the light of increasing and enhancing networking and engagement activities for interactive sessions.
3. Virtual platform technical requirements

The below indicated requirements are not the complete technical specification but should at this stage be seen as minimum requirements which will be further specified by the IAS. These are subject to change as we move forward with the virtual meetings.

The IAS encourages all who respond to the RFP to describe any and all useful features, services and tools offered by the provider that relate to the areas below or that the IAS may have missed entirely in this document, which may enhance the final solution.

Please provide details and images introducing your virtual platform, considering the below:

3.1 Look and feel
The platform should be a fast, low bandwidth and accessible platform with a UI that’s intuitive and understandable to those with limited tech knowledge similar to a website. **IAS Educational Fund meetings target resource-limited settings. The platform should therefore be easily accessible and easy to use for slow connections and low bandwidth.**

As a result, we are also aiming for 2D visuals.

3.2. Data integration and interfaces

3.2.1. Virtual platform – IAS CRM
The Registration and IAS CRM system (Dynamics 365) shall be integrated into the virtual meetings. All sessions and activities shall be available by Log-In for registered participants only, with some having restricted access only (activity or time, defined by participant type). Any setup or testing should be done together with the IAS’s ICT team as needed.

The virtual meeting platform should be using IAS SSO.

3.2.2. Virtual platform – Online programme
All meeting data, programme data & materials (webcast, presentation) should be synchronized with the IAS CRM, if applicable.

3.3. Usability and adaptability
The platform should be highly adaptable for various devices (PC, laptops, mobiles, tablets etc.) and various platforms (Windows, Mac, iOS, Android etc.), both old and new. The platform should be highly responsive, readable, and adaptive to the screen size of the device being used.

The platform should allow the content and services to be personalized and adapt to the user’s preferences (for example, through profile management and user right assignment, in addition to adapting to device languages as our sessions will be targeting participants from around the world). Users should also be able to have email or push notifications for subscription of reminders of scheduled sessions and latest news.

3.4. Hardware and software requirements
We will need a description of the video player that will be used to play all videos and the identified limitations (browser limitations, ability to avoid download of content, etc.).

3.5. Web streaming services
The system should adapt and deliver multiple formats based on the user’s connectivity speed and information about the codecs.
3.6. Disaster recovery/High availability/CDN capabilities
The cloud/server infrastructure and capacity to handle multiple parallel sessions of over 200 attendees is required.

3.7. Data ownership
The IAS will have full access to all data stored for virtual meetings, which must be considered in the development of the platform.

3.8. GDPR compliance
The registration process to access the platform and participant tracking on the platform must be GDPR compliant.

3.9. Data security
To ensure maximum security of the data, all possible technical means to secure the entire functioning of the virtual meetings is necessary. This applies to possible hacking attempts, as well as hardware failures. All communications and passwords must be encrypted. Databases accessed through APIs should be the highest encryption standards available. User data must always be protected.

3.10. Response to failures
The platform should have a help desk set in place with assistants from the provider’s team so that any issues raised by users can be addressed quickly and appropriately.

3.11. Backend

3.11.1. Access to the backend
The IAS Educational Fund staff need to have access to the backend as described below:

IAS Educational Fund staff must be able to:

- Update the session(s) (titles, descriptions, speaker details, presentation details, timing, outline, bios, etc.);
- Add new sessions or presentations or speakers;
- Upload content on behalf of speakers (ppt, self-recordings, consent). This option needs to be flexible for last-minute uploads before presentations take place;
- Access online reports and statistics (for example, missing consent form, missing ppt or recordings, etc.).

3.11.2. Uploading process
The uploading process of information impacting the online programme of the virtual meetings needs to be outlined clearly with a visual example.

3.11.3. Consent form handling
Consent forms for sharing speaker slide decks and presentation recordings are required for our virtual meetings. The platform should be able to:

- Handle multiple/different consent forms for meeting sessions;
- Handle multiple selection options per consent form;
• Handle consent for process for speakers with multiple roles in one session (for example, intro, presentation, Q&A) / consent form to be signed on a session and not on a presentation level;

• Distribute and remind speakers of the need to sign and upload consent forms (as appropriate).

3.11.4. Green room for semi-live and live sessions

The green room process required for semi-live and live sessions and the technical support provided to session organizers must be outlined and clarified. Speakers, organizers, moderators, IAS staff and green room technicians must be able to communicate with each other in the back-end (green room).

3.12. Training and documentation

The virtual platform should be developed so that speaker guidelines can be shared to provide a walkthrough on how to access the platform, meeting sessions and how to upload information to the platform. Other features that should have guidelines include how to pre-record presentations and how to work with enabled networking and engagement tools.

3.13. Platform language

The platform must be available in multiple languages, mainly in English and Portuguese for the period of Q1/2 2021 (however, please indicate if options for Spanish, Russian or Arabic could also be a possibility). The platform must have the option to be visible in various languages to assist participants to navigate from the landing page to other sections (sessions, documents and additional links).

In addition, the platform should be able to support interfaces that will provide translation and interpretation during the sessions in the languages listed above.
4. Proposal

4.1. Supplier overview
Kindly provide a general overview of your company and team. Please indicate which project manager will be designated as the main point of contact for this project.

4.2. Services provided
Please provide a detailed description of the platform capabilities and the services provided, following the sections in this RFP. Illustrate your descriptions with visuals and examples you have already delivered.

4.3. Platform setup and virtual meeting management
Please provide a breakdown of the distribution of labour in terms of the setup of the platform and then running the virtual meeting, outlining the various roles and responsibilities of the supplier and the IAS during this process, including support staff during the virtual meetings. Please include best practices for virtual meetings across multiple time zones.

The supplier shall provide an estimate of how much time it will take for the IAS to set up (for example, time required to create an event on the platform).

The supplier shall provide information about the scalability of virtual meeting content.

4.4. Project management
The provider shall organize a project planning session with the IAS to discuss the design of the virtual meeting user interface. This will serve to guarantee that the virtual meetings will satisfy IAS standards and requirements.

4.5. Support plan
The supplier shall be available to support the IAS Educational Fund with its virtual meetings (3-6 meetings throughout the year), as well as any need or issue that arises during the programme. Please provide a summary of the kinds of service level support plans that are offered and breakdown of services and costs.

Please also describe what types of support the supplier offers pre- and post-meeting. The supplier should list all services that it may offer for the virtual meetings (for example, project management, online support, session broadcasting, subtitle/ captioning translations etc.), which could add value to the meetings.

4.6. Project timeline
Please provide a detailed project timeline that outlines the start dates, activities to be carried out, deliverables, launch of a test virtual meeting and resources required.