# IAS

# Request for Proposal Satellites and exhibition ordering platform

<u>Documents required</u>

- Proposal based on requirements described in this Request for Proposal plus any supplementary information including
    - Ordering platform presentation
    - Detailed timeline based on the provisional planning provided (see page 11)
    - Costs as per the functional and technical specifications listed in the document plus any additional costs (if applicable)
- Supplier overview (Annex 1)

<u>Submission</u>

- Deadline: 31 August 2022
- Proposals must be submitted in English
- Incomplete proposals will not be considered
- Completed proposals should be submitted to:
    - alejandra.garcia@iasociety.org

# Table of Contents

# 1. General

## 1.1. The International AIDS Society

The International AIDS Society (IAS) 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. For more information, visit www.iasociety.org.

## 1.2. Background

With policy and science evolving at a rapid pace, opportunities for education, networking and the promotion of best practice are critical to enhance the global response to AIDS. Through its renowned conferences, the IAS provides an essential forum for a broad spectrum of HIV professionals to share their expertise and real-world experiences, and identify remaining knowledge gaps. The IAS organizes the world's two most prestigious HIV conferences, each convened biennially in alternating years:

The IAS Conference on HIV Science is the world's most influential meeting on HIV research and its applications. This biennial conference presents the critical advances in basic, clinical and operational HIV research that move science into policy and practice. Through its open and inclusive programme, the meeting sets the gold standard of HIV scientific convening, featuring highly diverse and cutting-edge research. The 12th IAS Conference on HIV Science, will take place from 23 – 26 July 2023 in Brisbane, Australia, and virtually. For more information, visit https://www.iasociety.org/conferences/2023-12th-ias-conference-hiv-science

The International AIDS Conference is the largest conference on any global health or development issue. This conference provides a unique forum at the intersection of science and advocacy, and an opportunity to strengthen policies and programmes to ensure an evidence-based response to the epidemic. The conference also serves as a focal point to intensify political and financial commitments to AIDS. For more information, visit https://aids2022.org

The HIV Research for Prevention Conference is the only global scientific conference focused exclusively on the challenging and fast-growing field of HIV prevention research. HIVR4P fosters interdisciplinary knowledge-exchange on HIV vaccines, microbicides, PrEP, treatment as prevention and biomedical interventions as well as their related social and behavioural implications. For more information, visit https://www.hivr4p.org

### 1.3. Satellites and exhibition

Satellites and exhibition are key components of the conferences. The IAS Conferences usually have between 30-55 satellite sessions and between 35-50 exhibitors, the AIDS Conferences between 80-120 satellite sessions and 80-100 exhibitors and the HIV Research for Prevention Conference around 20 satellite sessions.

Satellite symposia provide organizations with a unique opportunity to showcase their work. Although satellite symposia are part of the conference programme they are fully organized and coordinated by the organization hosting the satellite session.

The exhibition serves as a nexus of information and exchange for delegates, and is a perfect hub for showcasing organizations.

Satellite and exhibition packages are available for a fee based on the conference, the format and the organization type (non-commercial organization, commercial organization, foundation/government/UN Agency). Organizations interested in applying for one or more satellite and/or exhibition space must place their order through the satellite and exhibition ordering platform and will be confirmed only upon receipt of the payment in full. For satellite orders, the hosting organization must provide their basic session information (organizer name, title and description) during the ordering process for approval.

### 1.4. Pre-conferences

Pre-conferences are offered only for the AIDS Conferences.  The AIDS Conferences usually have between 10-20 pre-conferences.

Pre-conferences are independently organized meetings that offer a wide range of population- and issue-specific programming within the field of global health and development.

Pre-conference packages are available for a fee based on the conference, the format and the organization type (non-commercial organization, foundation/government/UN Agency). Organizations interested in applying for a pre-conference must place their order through the satellite, exhibition and pre-conference ordering platform and will be confirmed only upon approval of the letter of interest and receipt of the payment in full.

## 2.  Project scope

As new needs and requirements arise each year as we adapt to different/new components and formats of the conferences and in order to fulfil ever-changing order requirements, IAS is looking for high-level functional ordering platform. The primary aim is having an ordering system that will provide autonomy on the management and handling of the complete ordering process, in a highly efficient way and with the flexibility to adapt to the IAS needs.

## 2.1. Currency

All prices should be in USD (final USD rates). All invoices shall be issued in USD based on the proposed costs in USD.

## 2.2. The satellite and exhibition ordering platform
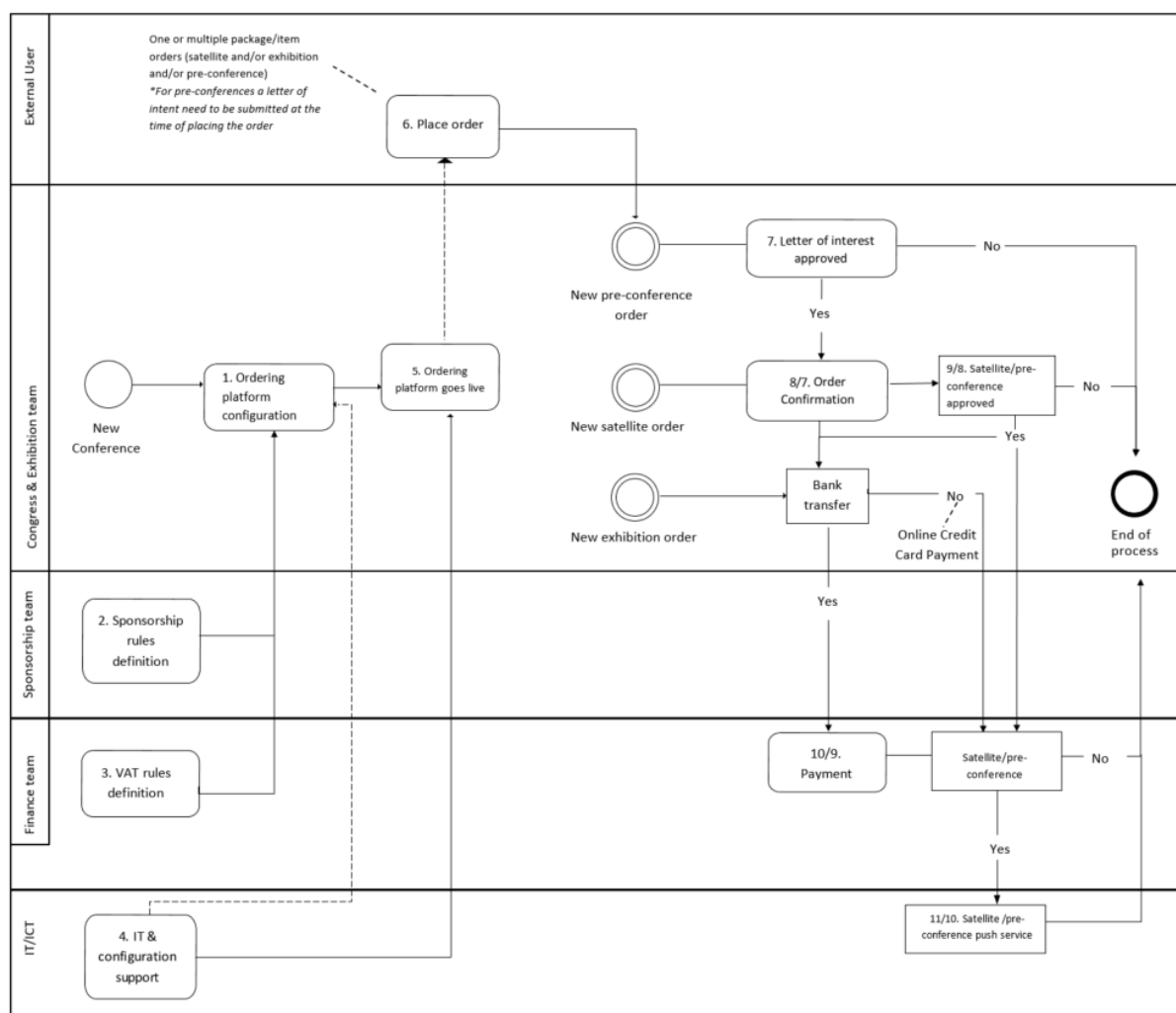


## 2.3 Purpose of the ordering platform

The satellite, exhibition and pre-conference ordering platform main functions are as follow:

- Organisations to place their satellite and/or exhibition and/or pre-conference order
- Process satellite and/or exhibition and/or pre-conference orders placed by organisations/companies
- Gathering pre-conferences letters of interest
- Acceptance of Terms and Conditions

- Payment processes, invoicing process and payment status
- Gathering satellite sessions content information (satellite organiser, satellite session title and description).
- Gathering pre-conferences content information (pre-conference organiser, pre-conference title and description).

- Approval of satellites and pre-conferences
- Synchronization of the satellite sessions and pre-conferences content information with third party service provider or any IAS internal application through API call.
- Automated emails
- Reports

## 2.4    Requirements

The satellite, exhibition and pre-conference ordering platform needs to include the following items:

| Item | User | Function |
|------|------|----------|
| Platform | External (organizations/companies) | <ul><li>Account creation and validation</li><li>Login (through SSO authentication)</li><li>Forgotten password</li><li>Package and items selection</li><li>Order overview</li><li>Order & billing address confirmation</li><li>Payment method selection</li><li>Credit card payment (if credit card was the selected payment method)</li><li>Email notification for order confirmation (incl. payment or invoice)</li><li>Purchase/order history</li></ul> |
| Back-office | Admin (C&E team and Finance team) | **Conference scope**<ul><li>Set-up of ordering form, including branding, text, content and items creation management</li><li>Rules configuration</li><li>Fees and VAT management</li><li>Orders management</li><li>Satellites and pre-conferences approval</li><li>External users management</li><li>Email notifications management</li><li>Master data template</li></ul>**Financial scope**<ul><li>Payment Gateway</li><li>Payment allocation</li></ul> |

| | | • Invoices export<br>• VAT management<br>• Reconciliation reports |
|---|---|---|
| Data Integration | Tech/Admin | Data synchronization with external API |
| Dashboards and reports | Admin (C&E team) | Customized reports<br>Data export |

The satellite, exhibition and pre-conference ordering platform must demonstrate the following assets:

- Customizable workflow, branding, formatting and content
- Flexibility to adjust the set-up and processes of the ordering platform based on each year's requirements and specific needs for satellites and/or exhibition and/or pre-conferences (especially regarding the possibility of adapting event formats, e.g., hybrid)
- Apply new rules, features/functions, including compliance with tax and invoicing requirements per conference
- Push service and synchronization of the satellite and pre-conference information with third party service provider
- Customized access for specific clients, Major Industry Sponsors (MIS) orders
- Customization of reports and automated emails
- Unlimited number of users (internal and external), fields, emails generated, storage capacity
- Intuitive, user friendly and flexible interface, mobile device friendly
- History tracking

The satellite, exhibition and pre-conference ordering platform must include the following services:

- Ongoing system adjustments and updates as required by the IAS (including smaller adaptations, changes and improvements to the system)
- All data shall be stored and kept safe. Backup of all data should be done systematically, and redundancy solutions should be in place for all systems
- Internal user training on the platform and user's manual
- Fast issue solving and bug fixing support and customer help desk
- GDPR compliant data collection and protection
- Web hosted
- Web browser compatibility: -EDGE, Firefox, Chrome, Safari

# 3.   Functional requirements: detailed features

The satellite, exhibition and pre-conference ordering platform must include the following features:

## 3.1     Ordering platform

| Feature | Details |
|---|---|
| Customized branding | Ordering form texts, content, logos, colours based on the conference (different every year) |
| Language | The official language is English |
| Account creation and validation based on email address | Three sections with defined fields to be completed by the organization/company's point of contact<br><br>1. Organization information<br>• Organization name<br>• Organization type (from specific list)<br>• Address<br>• Zip code and town<br>• Country<br>• VAT number<br><br>2. Contact person information<br>• Gender<br>• First name<br>• Last name<br>• Phone number<br>• Email address<br>• Alternative email<br><br>3. Acceptance of Terms and Conditions and data privacy policy |

| Access rights | There are three levels of access for the ordering platform |
|---|---|
| | **1. External users (organizations/companies)** |
| | Access to the ordering platform will be done through SSO authentication. |
| | The type of access is linked to the pricing; a three tier structure, defined by the organization type (a, b or c). |
| | a) Commercial organizations |
| | • access to the satellite, exhibition and pre-conference packages and items |
| | • placing orders |
| | • process payment online |
| | b) Non-commercial organizations |
| | • access to the satellite, exhibition and pre-conference packages and items |
| | • placing orders |
| | • process payment online |
| | c) Foundation/government/ UN agency |
| | • access to the satellite, exhibition and pre-conference packages and items |
| | • placing orders |
| | • process payment online |
| | **2. Major Industry Sponsors (MIS) users** |
| | Specific external users that have special prices (different from the three tier pricing structure) |
| | • access to the satellite and exhibition packages, items (at a special fee) |
| | • access to additional exclusive MIS related items |
| | • place orders |
| | **3. Admin users** |
| | IAS authenticated users who manage the platform |

| | |
|---|---|
| Platform users access | Access to personal account where the organization/company's point of contact is able to:<br><br>1. Select one or more packages<br>2. Select an item (add-on) only upon selection of a package<br>3. Select payment method, pay by credit card if that is the selected payment method, and place the order<br>4. Change payment method<br>5. View purchase history and payment status<br>6. View satellite and/or pre-conference status (approved, under review, rejected)<br>7. View/download invoice(s)<br>8. View/download Terms and Conditions<br>9. View/edit account details<br>10. View conference organizers contact information |
| Navigation | There are 4 main navigation levels.<br>1. Satellites content (description and packages)<br>2. Exhibition content (description and packages)<br>3. Pre-conferences content (description and packages)<br>4. My account |
| Placing order | Process to place an order:<br><br>1. Login<br>2. Package selection (added to shopping cart)<br>3. item (add-on) selection if available and only upon package selection (added to shopping cart)<br>4. Satellite session and/or pre-conference information (applicable only for satellite and/or pre-conferences orders that need to be approved by the IAS)<br>&bull; *Pre-conferences need to be first approve by IAS, before being able to  move forward with payment and confirmation*<br>5. Order and billing address confirmation<br>6. Payment method selection (bank transfer or credit card)<br>7. Order confirmation |
| Order confirmation | All online orders shall be confirmed to the platform users by an automatic email summarizing the order. The email text and attachment will vary depending on the selected payment method and booking (satellite, exhibition or pre-conference package).<br>&bull; If credit card payment was chosen as payment method, the invoice (pdf) as defined by the IAS need to be attached to the email.<br>&bull; If bank transfer was chosen as payment method, the payment order (pdf) as defined by the IAS need to be |

| | |
|---|---|
| Packages selection | Display and selection of one or more satellite and/or exhibition and/or pre-conferences packages<br><br>The pricing of the packages is based on the organization type (non-commercial, commercial, foundation/government/UN agency), therefore the display of the packages for those placing the order in the platform has to be aligned with their organization type (information provided during the account creation) |
| Add-on items selection | • Display and selection of add-on items per package selected<br>• Add-on orders need to be linked to the corresponding package (satellites and/or exhibition and/or pre-conferences). |
| Satellite session and pre-conference information | Satellite/pre-conference organizers need to provide basic session information (organizer name, title and description) during the ordering process in order to be reviewed and approved by the IAS after submission |
| Terms and Conditions | Display different "Terms and Conditions" based on the set criteria<br>1. Terms and Conditions for satellite organizers<br>2. Terms and Conditions for exhibitors<br>3. Terms and Conditions for Major Industry Sponsors (MIS) |
| Automated email notifications | • Account creation and validation<br>• Password reminder<br>• Order confirmation (includes payment confirmation information if done with credit card)<br>• Payment confirmation (once bank transfer payment is entered in back office)<br>• Satellite approval status (approved/refused/pending)<br>• Payment reminder<br>• Satellite session missing information reminder |

## 3.2 Back-office

Conference scope

| Feature | Details |
|---|---|
| Master data template | Master data template for the configuration of the platform based on previous configurations provided for past conferences |
| Content/items creation management | Configuration of new satellite and exhibition packages, add-on items and static content pages (e.g. Terms and Conditions, Contact Us) |

| | |
|---|---|
| Business rules configuration | Configuration of business rules based on different categories:<br><br>• Package prices based on organization type<br>• Fee type (early fee – standard fee)<br>• Customized access for Major Industry Sponsors (based on special prices and specific Terms and Conditions)<br>• VAT rules |
| Templates Management | Configuration of templates:<br><br>• Purchase orders and invoices (PDF files)<br>• Email notifications templates:<br>  - Account creation and validation<br>  - Password reminder<br>  - Order confirmation (includes payment confirmation information if done with credit card)<br>  - Payment confirmation (once bank transfer payment is entered in back office)<br>  - Satellite status (satellite approved/ refused/under review)<br>  - Payment reminder<br>• Satellite session missing information reminder |
| Orders management | • Order overview (key information)<br>• Order detailed information to include:<br>  - Order status (pending/confirmed - once the payment is processed/cancelled)<br>  - Type of package/item ordered (satellite and/or exhibition, add-on item), price and type of fee (early or standard)<br>  - Ordering date<br>  - Invoice details (invoice number, status (paid, payment date/unpaid, amount, balance and payment method)<br>  - Organization and contact person details<br>• Search engine (with possibility to apply filters based on the key information)<br>• Cancelling option (specific package and/or add-on item from a multiple packages/items order)<br>• Admin user to be able to place orders on behalf of external users (regular and Major Industry Sponsors users).<br>• Admin user to be able to apply a discount<br>• Comment field at order level for internal referencing |

| | |
|---|---|
| Satellites approval management | • Functionality to accept or reject a satellite/pre-conference order based on the information provided by the satellite/ pre-conference organizer during the ordering process.<br>• Admin user to be able to set a satellite as: approve - reject - under review (more information would be required) |
| Fees management | • Automatic update from early to standard fee (after early fee deadline)<br>• Simplify way of updating the packages/items and purchase orders (unpaid orders) from early fee to standard fee (after early fee deadline) when applicable.<br>• Enable the use of early fee after deadline upon decision of IAS |
| External users management | View/edit the account details of the external users (regular and Major Industry Sponsors users) |
| Email notifications management | • Configure and edit the automatic email notifications that are sent to external and Major Industry Sponsors users<br>• Bulk action to send reminders<br>• Bcc of all automated emails sent out from the system to an email address defined by IAS |
| Invoices adjustments | Admin user to be able to easily modify/edit the billing address information of an invoice (e.g., add a P.O number, company name displayed) upon request of the organization/company point of contact |

Financial scope

| Feature | Details |
|---|---|
| Invoices creation | • Automatic invoice creation as soon as the payment by credit card is accepted or the payment is registered after account transfer<br>• Back-end access to a separate copy of each invoice that includes the internal budget line reference for financial reconciliation purposes |
| Payment orders creation | Creation of purchase orders when the user chooses the bank transfer payment method and the order is not paid |
| Payment allocation | • Account transfers allocation in the back office and automatic invoice generation<br>• Automatic payment allocation for credit card payments and automatic invoice generation |
| Partial or full refunds | Creation of credit notes (with a status of "refunded" displayed under the order details once the refund has been confirmed) |

| Invoice export | • Monthly invoices export (PDF files) of a separate copy of each invoice that includes the internal budget line reference for financial reconciliation purposes <br> • Monthly invoices report |
| --- | --- |

### 3.3    Dashboards and reports

| Feature | Description |
| --- | --- |
| Dashboard | • Tracking tool/functionality that can help gather and access different data needed for reporting/analysis (incl. different years/conferences for <br> • year comparisons purposes) <br> • Search tool to quickly access specific data |
| Customized reports | • Organizations/companies details (name, category, country) <br> • Orders detailed information: type of order (satellite and/or exhibition), order date, order status (pending, confirmed, cancelled), package(s)/items selected, payment date, type of fee and amount <br> • Satellite session content information: title, description and satellite organiser <br> • Satellites approval status: approved, rejected, pending <br> • Satellites and exhibition payment status: paid, unpaid, partially paid <br> • Invoices (information related to the invoicing): billing address details, status, amount, balance, budget line <br> • Users: first, last name, email, organization, country <br> • Payment allocations (linked to the payment status per order):payment method, amount received, bank fees (if applicable) <br> • VAT (report applicable if there are VAT implications): VAT number, net amount, VAT amount, gross amount |

# 4.    Technical requirements

| Feature | Description |
| --- | --- |
| Admin configuration | Admin configuration back office |
| Users Management | Possibility to manage the access of internal (admin users) and external users (regular and Major Industry Sponsors users, including multiple users per account) to the ordering platform, including editing of the account details |
| Templates Configuration | Personalize the email notifications through variables configuration |
| Reports data configuration | Configure dashboard data collection and the reports |

| Log events | Access to the log events of the Ordering Platform for debug purposes |
|---|---|
| Integrations Synchronizations | Platform Users need to have access to the satellites and exhibition ordering platform through SSO authentication

IAS credit card gateway from Datatrans for all credit card payments

Information synchronization with external party or IAS system through APIs |

# 5.    Provisional planning

| Proposal deadline | 31 August 2022 |
|---|---|
| Supplier selection | 1 - 6 September 2022 |
| Implementation and configuration phase | 7 September – 21 October 2021 |
| Full platform and final functionalities testing | 24 October – 29 November 2022 |
| Validation | 30 November 2022 |
| Launch for IAS 2023 | 7 December 2022 (to be confirmed by the IAS) |

# ANNEX 1

## SUPPLIER OVERVIEW
To complete and submit as part of your proposal

### SUPPLIER NAME

| | |
|---|---|
| Company Name | |
| Postal Address | |
| Contact Person | |
| Email Address | |
| Phone Number | |

| | |
|---|---|
| Year Company Founded: | |
| Full-Time/Part-Time Employees | |
| Office Locations: | |

### PROPOSED PROJECT TEAM

| | Name | | | |
|---|---|---|---|---|
| Project Manager | Experience<br>Brief description of his/her experience with similar scope | | | |
| | Competing Projects<br>Number of different projects the PM will undertake in the lead-up and during the project timeline (April – November 2021) | | | |
| | Language Skills<br>Please indicate the language the PM is able to communicate (English is a must) | | | |
| Additional project team member(s)<br>Please indicate the number of additional project team members. | Name 1 | | Role | |
| | Name 2 | | Role | |
| | Name 3 | | Role | |

**THIRD PARTIES (only if applicable)**

| | |
|---|---|
| Company Name | |
| Company Address | |
| Role | |

**RELEVANT EXPERIENCE**

| Project 1: | Client | |
| | Project date and duration | |
| | Brief Description | |
| Project 2: | Client | |
| | Project date and duration | |
| | Brief Description | |
| Project 3: | Client | |
| | Project date and duration | |
| | Brief Description | |
| Project 4: | Client | |
| | Project date and duration | |
| | Brief Description | |
| Project 5: | Client | |
| | Project date and duration | |
| | Brief Description | |

**REFERENCES**

Please provide three references you have provided the similar services as outlined in the RFP that the IAS can contact to provide a reference:

| Reference 1: | Company Name | | Contact Person | |
| | Email Address | | Phone Number | |
| | Project (brief description) | | | |
| Reference 2: | Company Name | | Contact Person | |
| | Email Address | | Phone Number | |
| | Project (brief description) | | | |
| Reference 3: | Company Name | | **Contact Person** | |
| | Email Address | | **Phone Number** | |
| | Project (brief description) | | | |

# IAS

## SOCIAL RESPONSABILITY

IAS is committed to purchasing sustainable goods and services. Please describe how the service that you are proposing will be provided in a sustainable manner (e.g. considering waste reduction and recycling, toxicity reduction, health and safety). You can use reference to United Nations Global Compact (UNGC).

## ADDITIONAL INFORMATION

Please provide any other additional information applicable to this proposal but not captured above, and add any information that sets you apart from your competitors.

| Eligibility | By checking this box, the supplier affirms that it is not suspended, nor debarred, nor otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization | |
| --- | --- | --- |
| Ethics - HIV | By checking this box, the supplier affirms that they do not actively or implicitly support discriminatory workplace policies including, but not limited to, real or perceived HIV status, sexual orientation, gender identity, mental or physical disability, age, race/ethnicity, marital status, family or care giver's responsibilities, pregnancy, religion, or political views that would negatively impact people living with HIV, the IAC community and its delegates | |
| IAS Values | By checking this box, the supplier affirms that they share the IAS values available here: https://www.iasociety.org/mission-vision-and-values | |
| Proposal submission | By checking this box, the supplier affirms that they have read the RFP with due consideration and acknowledge its content in its entirety. | |

Name:

Position occupied in the company:

Date:

Signature: