Project Title	National Center for Education Research (NCER) and National Center for Special Education Research (NCSER) Principal Investigators Conference
Name of Offeror	DC Global Planning and Strategic Results, LLC
Unique Entity ID Number	TNDQWXAJLYC5
GSA Schedule Number	91990024R0007
List of Subcontractors	N/A
Contact Info of Offer's Authorized Official for Contract Administration	Charles Fields, CO Charles.Fields@ed.gov
Name/Contact Information for the Offeror's Negotiators for the Technical Proposal	Cecilia Andersen cecilia@dcglobalplanning.com
Signature of Officer of the Firm	Cecilia Andersen

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2. Abstract [Authored: Cecilia Andersen]

DC Global Planning and Strategic Results~~²~~ (the JV) is pleased to respond to the Department of Education's (ED) solicitation for the National Center for Education Research (NCER) and National Center for Special Education Research (NCSER) Principal Investigators (PI) Meeting. ~~Our~~ The JV's detailed approach is provided on the following pages, outlining ~~our~~ a comprehensive strategy for the efficient execution of the PI Meeting. This underlines ~~our~~ the JV's full compliance ~~to~~with the solicitation requirements without exception.

Within Section 4, "Technical Approach," ~~we~~ the JV describes a series of critical tasks, from contract management to individual logistical requirements. This document introduces ~~our~~ the JV's detailed technical approach to Tasks 1 through 13, outlining ~~our~~ the organization's proven past performance in providing each task to ~~Government~~ government agencies ~~in the past~~ and highlighting our unique approaches to ED's requirements.

~~Our k~~The ~~ey personnel's~~ expertise and defined responsibilities of the key personnel are pivotal ~~in~~ to ~~our~~ the JV's success. Section 5, "Key Personnel," outlines their proposed level of effort on this requirement and relevant experience.

Within Section 6, "Project Management Methodology," ~~we~~ the JV describes ~~our~~ the proposed communication strategies, responsibility delineation, and authoritative pathways for the planning, execution, and management of the project's tasks and subtasks. ~~We~~ The JV outlines ~~our~~ policies and procedures for cost control and management, ensuring transparency throughout the project's lifecycle. ~~Our~~ The JV's organizational structure is designed to maximize efficiency and effectiveness, supported by an account of each staff member's invested effort and the strategic employment of subcontractors and consultants ~~where beneficial~~.

This summary reflects the JV's thorough acceptance and understanding of the solicitation requirements, presenting a clear, informed, and accessible overview of our planned approach to orchestrating a successful PI Meeting. ~~Our~~ The JV's proposal stands as a testament to our readiness ~~and eagerness~~ to undertake this project, promising a well-organized, engaging, and insightful event for all participants.

3. Introduction [Authored: Cecilia Andersen]

DC Global Planning and Strategic Results (the JV) is an 8(a) Joint Venture with over 65 years of combined experience managing successful events for ~~Government~~ government clients, including previous NCER and NCSER PI Meetings. Offering a suite of services such as project management, meeting coordination, web development, and logistical support, the JV has served numerous ~~Federal~~ federal agencies, including the U.S. Department of Education. ~~By~~ With insights gained from previous projects, JV crafts solutions tailored to meet client needs.

DC Global Planning (DCGP) specializes in the design and execution of ~~Government~~ government meetings and events. From curating agendas to managing logistics, every detail is overseen with cultural sensitivity, accessibility, and astute business insight. With nearly 20 years of experience, DCGP aspires to exceed expectations at every juncture. DCGP has previously managed the NCER and NCSER PI Meeting as a subcontractor to Manhattan Strategy Group, with members of our team serving for multiple years. ~~We~~ The JV ~~are~~ is ready to start on day one with no interruption to service for the ED customer.

As demonstrated ~~in~~ with over 25 years of support to the ~~Federal~~ federal ~~Government~~government, Strategic Results (SR) can provide the full range of requested meeting support services to the Department of Education. SR has managed national and international meetings for ~~Government~~ government agencies, top-tier research universities, and corporate, association, and foundation clients since 1996. Strategic Results has the capability to go above and beyond in two critically important areas:

supporting unique target audiences through proven communication processes and creating high levels of collaboration and high-level visibility for conference outcomes.

4. Technical Approach [Authored: Cecilia Andersen]

Our technical approach relies on strong communication and a technical project team of key personnel who are experienced in all aspects of meeting planning, including key personnel, Cecilia Andersen, Sancta Watley, and Stephen Coleman, who have worked on previous years' PI meetings.

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~~4.1~~ Task 1: Manage Contract [PWS 6.1] [Authored: Cecilia Andersen]

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~~Our~~ The JV's contract management approach relies on constant communication with the Institute of Education Sciences (IES) on progress and challenges for the entirety of this project. ~~Our~~ The JV's communication strategy has resulted in successful meetings for ED, the National Institutes of Health, and the Department of Defense, amongst other clients. Within five days of contract award, the Project Director and key team members schedule a kickoff meeting with IES (Deliverable 1.2). ~~We~~ The JV creates the agenda ~~for this meeting~~ and presents it to IES for review within three days of award (Deliverable 1.1). Within this agenda is a review of the Statement of Work, workplan, lines of communication with IES, and any clarifications on reporting processes and timelines. ~~We~~ The JV documents the meeting's discussions and any action items to produce a summary report and revised workplan, which is submitted to the COR one week after the meeting (Deliverable 1.3).

The JV conducts bi-weekly meetings with the COR to provide updates on the contract's progress (Deliverable 1.4). Within two days of each meeting, ~~we~~ the JV submits a memo summarizing the discussion and any action items (Deliverable 1.5). By the 10th day of each month, the JV submits a Monthly Progress Report (MPR) (Deliverable 1.6) detailing the month's activities and achievements and outlining the deadlines and tasks for the next month. The MPR covers details, such as efforts made

during the last month, imminent deadlines and expected outputs, issues, and the measures undertaken to resolve them.

The JV has a history of managing contracts with a similar scope and timeline, including DCGP's experience as a major subcontractor on prior IES PI Meetings. The JV employs its established templates for work plans, hotel agreements, materials, and other related contract tasks and materials, providing a foundation for project execution. The JV uses proven Project Management platforms that contribute to our meeting planning success. Our toolset maximizes efficiency, monitors, and controls performance, and ensures repeatable, high-quality results. ~~We~~ The JV uses Microsoft Project for Work Breakdown Structure maintenance, scheduling, and planning; and tracking ADP EZ Labor Management for labor charge tracking; Trello for a teamwork tool and transparency with the client; QuickBooks for accurate accounting and financial management; QA reports for quality management; checklists for activities; and Microsoft PowerPoint for briefings.

4.2 Task 2: Secure PI Meeting Venue [PWS 6.2] [Authored: Vanessa Bridges]

Selecting the right venue fosters an environment where IES grantees can exchange knowledge and insights with one another and with IES personnel. The JV will provide a short list of venue options capable of hosting up to 800 attendees in a chart for the client to select from, with our guidance. ~~Our~~ The JV's team possesses extensive knowledge of venues in the Washington, DC area, and a deep understanding of ED's requirements. A scan of venues is already underway, assisted by our vendor HelmsBriscoe, who specializes in securing meeting venues at exceptional values. The venue search adheres to the criteria outlined by ED, which includes securing:

Table 1: Venue Room Requirements

Room	Description
Plenary Room	Meets capacity, accessibility, and A/V requirements, including for virtual presenters. The JV boasts established connections with A/V suppliers in the DC area, enabling us to obtain the required equipment at competitive rates.

Breakout Session Rooms	At least 8 breakout session rooms with capacity for at least 100 attendees equipped with all necessary presentation tools, including the capability to livestream virtual presentations.
Exhibit Hall Space	Holding at least 100 poster presentations, equipped with the infrastructure to display visual content.

For all conference venues, ~~we~~ the JV ensures that all selected facilities comply with ~~Federal~~ federal accessibility standards for individuals with disabilities, in line with the mandates of Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. 794, and other relevant ~~Federal~~ federal guidelines. Furthermore, ~~we~~ the JV understands that the ~~Government~~ government cannot pay for food and beverage at this conference. ~~We~~ The JV offers meeting attendees a curated list of local dining options within walking distance of the venue on the meeting website and can negotiate with the selected venue to offer boxed lunches at the per diem rate for participants to purchase.

Given the limited preparation time for the PI Meeting in the base year, the JV has identified and reached out to nine hotels for their availability in the Fall of 2024. These are the Grand Hyatt, Hyatt Regency Capitol Hill, Marriott Marquis, Marriott Wardman Park, Omni Shoreham, Renaissance, and Washington Hilton in DC; Gaylord National in MD; and Crystal Gateway Marriott in VA.

4.3 Task 3: PI Meeting Website and Mobile Application Development [PWS 6.3] [Authored: Samara Vasquez]

The technological framework for this meeting is a cohesive suite of three platforms, each tailored to enhance the experience for attendees and staff during different phases of the meeting lifecycle. The three technology elements ~~we~~ the JV will develop are described below, in Table 2:

Table 2: PI Meeting Technology Framework

Item	Description
PI Meeting Website	A browser-based website, crafted to share essential conference details to attendees before and after the meeting. Our IT/Technology Manager, Steve Mossner, builds conference websites for the JV's g~~G~~overnment clients. More details are provided in Section 4.3.1, to follow.
Mobile Application	An indispensable tool for attendees and staff throughout the conference. In the past, ~~we have~~JV used the Whova App for meetings and conferences. More details are provided in Section 4.3.2, to follow.
Registration Management System	A robust registration management system, linked to the conference website. This system streamlines conference registration. ~~We~~ The JV uses custom-built forms for registration and record attendee

	registration data in comprehensive Microsoft Excel spreadsheets. More details are provided in Section 4.6.

Together, these platforms are fully compliant with ED's security and information technology requirements and form the technological backbone of the PI Meeting.

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4.3.1 PI Meeting Website [Authored: Stephen Mossner]

~~We~~ The JV uses WordPress to develop meeting websites that can be maintained on the IES Data Center servers. WordPress affords the JV a robust content management system, enabling our team to handle website content efficiently. ~~We~~ The JV embeds registration into the meeting website, which offers attendees a one-~~-~~stop shop for all information gathering and registration actions.

Within six weeks of award, the JV presents a mock-up of the PI Meeting website (Deliverable 3.1) and our strategy to provide ongoing technical and logistical support (Deliverable 3.2). Upon receipt of feedback from the COR, ~~we~~ the JV will revise the website mock-up within two weeks. The JV is committed to ensuring that the meeting website is live within five months prior to the meeting to maximize the timeframe for promoting the event and accumulating registrations (Deliverable 3.3). The rollout of the meeting website occurs in two distinct phases. Upon approval, Phase 1 goes live four months before the meeting (Deliverable 3.3), featuring an introduction to the meeting theme, ~~;~~ a registration portal, ~~;~~ a portal for submitting poster presentations, ~~;~~ and logistical travel details. Phase 2 begins after the meeting ends and provides ~~The~~ the two phases that are described in Table 3, below:

Table 3: Meeting Website Phases

Phase	Timeline	Description
Phase 1	The day the website goes live through meeting closure.	Phase 1 updates to the meeting website ~~are~~ include the detailed conference agenda and agenda-at-a-glance, ~~;~~ dedicated subpages for speaker biographies, ~~;~~ online forums designed to encourage interactions between presenters and attendees, ~~;~~ integrated social media channels, ~~;~~ and a gallery for online poster presentations. Weekly updates introduce new information and resources as they become available. The ~~We~~ JV anticipates that the week preceding the conference might necessitate daily updates to the site.
Phase 2	After conclusion of meeting, indefinitely.	Includes access to post-event resources like video recordings and presentation documents. During this phase, the website is finalized and archived as a record of the year's proceedings. The JV

		maintains and updates the website until the contract's termination, ensuring that conference materials remain accessible even after the event's conclusion.

Section 508 compliance is necessary to ensure accessibility. The JV uses tools such as the Web Content Accessibility Guideline and the Americans with Disabilities Act best practices toolkit, GSA Accessibility Design Standards, and the PDF Accessibility Checker 3 application, to achieve 508 compliance. Additionally, the JV's IT team will verify that the website performs optimally across web browsers and adheres to all applicable ~~Federal~~ federal guidelines. At the contract's end, the JV will hand over the cloud-server instance along with the web and database files or provide static versions of these files to IES for archival purposes.

4.3.2 PI Meeting Mobile Application [Authored: Vanessa Bridges]

The JV has field-tested the leading meeting apps and ~~we~~ would suggest the Cvent partner Event Hub or Whova for the PI Meeting. They both have a strong user interface and provide best-in-class services in session streaming, attendee engagement, and networking. ~~We~~ The JV will provide a Demo of both applications for the client to select from. ~~We~~ The JV will submit a mock-up of the selected application at least ~~3~~ three months prior to the event (Deliverable 3.4). Once the COR has reviewed the app and feedback is implemented, the app is made live, at least ~~2~~ two months prior to the event (Deliverable 3.5). Attendees will be sent a link to download the mobile app prior to the PI Meeting. All platforms used for registration, streaming, and mobile apps will be compliant with FedRAMP guidelines.

4.4 Task 4: Develop PI Meeting Agenda [PWS 6.4] [Authored: Samara Vasquez and Stephen Coleman]

To facilitate the development of the PI Meeting agenda, the JV undertakes a series of structured steps, working closely with IES and designated Meeting Co-Chairs. This collaboration includes providing administrative support, such as scheduling meetings, taking notes, and facilitating

brainstorming sessions to gather feedback and suggestions on the meeting's theme, session strands, and agenda, as well as identifying engagement opportunities (Deliverable 4.1). Our Education Research Lead, Stephen Coleman, has previously performed this service for the PI Meeting.

In preparation for these discussions, the JV compiles a preliminary agenda detailing proposed session ideas, networking opportunities, and engagement activities (Deliverable 4.2). This document is sent to the COR for review at least four months prior to the PI Meeting, ensuring there is time for refinement based on IES's input. Following feedback, the JV works diligently with the Co-Chairs and IES to finalize the meeting agenda, taking into account any potential scheduling conflicts, session time allocations, topic areas, and thematic strands (Deliverable 4.3). Throughout this process, the JV will ensure the Co-Chairs are clear on their roles ~~on~~ in the agenda development, including awareness on who the final decisionmakers are.

Three months before the meeting, the JV submits a draft of the PI Meeting Agenda and a mock-up of the online agenda format (Deliverables 4.4, 4.5). This format is designed with searchable key fields. Additionally, a preliminary Agenda-at-a-Glance is provided, which is posted on the PI Meeting website within two days of approval (Deliverable 4.6).

Following the approval of the final agenda by IES, two months prior to the PI Meeting, the JV confirms the availability of presenters and ensures the finalized agenda is accessible on the PI Meeting website and through the mobile application (Deliverable 4.7, 4.8). Throughout this process, the JV posts agenda updates to the website as they are available. Through these efforts, the JV ensures the PI Meeting is an organized and engaging event. ~~Our~~ The JV's in-house accounting team works with IES to distribute honoraria to the Program Co-Chairs two weeks after the PI M~~m~~eeting (Deliverable 4.9).

4.5 Task 5: Manage Breakout Session and Poster Session Proposals [PWS 6.5] [Authored: Samara Vasquez]

Breakout and poster sessions foster engagement and collaboration among attendees fostering future collaboration. To ensure the call for posters attracts quality submissions through a seamless process, the JV establishes an approach encompassing three key areas: (1) issuing a call for posters aligned with IES research priorities, (2) facilitating the submission of poster abstracts, and (3) assisting IES COR and Meeting Co-Chairs to implement a rigorous review process.

Within two months of contract award, the JV submits a draft plan to review and select proposals, crafted by our Education Research Lead, outlining the calls for posters and breakout sessions, submission guidelines, and review processes (Deliverable 5.1). This document features a template for abstracts, establishes a timeline for submissions, and proposes evaluation criteria to IES. Upon receiving feedback from IES, the JV delivers a final plan to manage the poster sessions (Deliverable 5.2) no later than three months after contract award. Following this, the JV reaches out to all potential meeting participants, encouraging them to submit abstracts within a four-week window. After this time, the JV compiles and reviews all submitted abstracts, following the predefined selection criteria and processes outlined in the poster session plan to produce a final list of selected presenters. After obtaining IES approval for this list (Deliverable 5.4, 5.6), the JV reaches out to the chosen presenters via email to notify them of their selection (Deliverable 5.7).

Within the selection notification, presenters receive a poster session guide. This document covers logistics, such as the dimensions of the display area, the duration of the display, and set-upup/dismantle timings. To ensure a positive onsite site experience during the poster sessions, a JV staff member will be available to assist presenters with any questions or needs, guaranteeing a well-organized and supportive environment to share their research findings.

4.6 Task 6: Develop and Monitor Conference Registration Form [PWS 6.6] [Authored: Cecilia Andersen and Stephen Mossner]

The JV has the added benefit of uniting skill sets from two different teams with the capacity to build conference registration forms using two ~~a~~ programs ~~-~~called MachForms and Cvent. The JV will ~~therefore~~ provide demos of both options with the pros and cons of each for the client to select from. Once selected, ~~we~~ the JV will submit a draft of the registration form questions and a mock version of the form for COR approval (Deliverable 6.1). This form collects attendee data and can be built using conditional logic. ~~We~~ The JV can edit the registration form at any point in the period of performance if changes are required after approval. These forms are embedded on the meeting website and distributed to prospective attendees five months prior to the PI Meeting (Deliverable 6.2). On registration, MachForms and Cvent both generate confirmation emails.

Following the activation of the registration form, the JV emails invitations to all IES grantees and contractors that detail the registration process, ~~include~~ including a link to the meeting website ~~,~~ and poster session submission guidelines. The JV provides the COR with weekly updates on registration until it closes one week before the meeting (Deliverable 6.3). Within one business day of registration closing, the JV submits a final list of all meeting registrants to the COR (Deliverable 6.4). This systematic approach ensures a smooth registration process, enabling effective planning and coordination for the upcoming meeting.

4.7 Task 7: PI Meeting Materials Development and Preparation [PWS 6.7]

To create and distribute meeting materials, the JV undertakes a series of steps in collaboration with the COR and in line with requirements. Initially, the JV will engage with the IES Director of Communications to guarantee that all materials accurately reflect the IES brand and Style Guide (Deliverable 7.1) and are Section 508 compliant. The JV delivers all meeting materials to the PI Meeting

venue one day prior to the event (Deliverable 7.4). Beforehand, materials are stored at ~~our~~ the JV's site and are delivered by ~~our~~ the onsite staff to the meeting venue as part of set-up.

In the development phase, the JV incorporates IES branding into materials, ensuring consistency across all items. Prior to finalization, all content receives approval from the COR, with design options based on the meeting's theme submitted no later than three months after contract award. This includes the preparation~~ring~~ of drafting social media messages designed to generate interest in the meeting, ~~and~~ promoting~~e~~ the IES community (Deliverable 7.2), ~~as well as~~and including a Section 508 compliant PowerPoint template (Deliverable 7.3). This template uses the IES logo and echoes the design of other meeting materials, enhancing visual coherence. ~~We~~ The JV submits three PowerPoint template options to the COR at least three months before the PI Meeting and creates a final template using any feedback.

4.8 Task 8: Onsite Meeting Support [PWS 6.8]

The JV allocates a team of onsite ~~site~~ logistics staff to offer support throughout the event (Deliverable 8.1). With this team, ~~we~~ the JV ensures that all aspects of the meeting logistics are handled professionally, contributing to a successful meeting. The services they provide include:

Table 4: Onsite Meeting Support Services

Role	Responsibilities
Registration Assistance	Ensure PI Meeting materials have arrived and are distributed, coordinate registration, ensure accommodations and accessibility needs are met, and provide support to participants.
Speaker Support	Confirm speakers' session locations and times and provide requisite audiovisual and technical assistance for presentations. Assist with A/V and coordinate virtual presentations.
Session Monitoring	Oversee meeting rooms, coordinate onsite technology services, and livestream and record specified sessions.

4.9 Task 9: Livestream and Record PI Meeting Sessions and Collect Session Materials [PWS 6.9]

[Authored: Samara Vasquez]

The JV facilitates live streaming with interactive Q&A sessions for selected PI M~~m~~eeting sessions (Deliverable 9.1). This involves setting up technology, coordinating with speakers, and ensuring

participant engagement. The JV records these sessions with professional-grade equipment and technicians to ensure high-quality videos (Deliverable 9.2). Within three weeks of the PI Meeting, ~~we~~ the JV submits all recorded sessions to IES, ensuring they are Section 508 compliant (Deliverable 9.3). Upon approval, ~~we~~ the JV uploads the recordings to the meeting website within three days (Deliverable 9.4). One week after the PI Meeting, ~~our~~ the JV's team collects electronic copies of all presentations for distribution (Deliverable 9.5). ~~We~~ The JV ensures that all presentation files are Section 508 compliant and submits them to IES within three weeks of the meeting (Deliverable 9.6). ~~We~~ The JV will upload copies of the presentation files to the meeting website within three days of IES approval (Deliverable 9.7).

4.10 Task 10: PI Meeting Feedback Survey [PWS 6.10] [Authored: Vanessa Bridges]

In preparation for the PI Meeting, the JV creates a feedback survey to capture attendees' impressions of the effectiveness and relevance of the meeting content and logistics. This survey is a tool for both the JV and IES to assess the event and gather constructive suggestions for future meetings.

The process includes developing a draft survey including questions that cover all meeting components. This draft survey is submitted to ED six weeks before the meeting (Deliverable 10.1). Upon receipt of feedback ~~on the draft~~, the JV refines the content and format into a final version of the survey that is prepared for the COR to submit to the OMB for approval (Deliverable 10.2). This submission is prepared by ~~our~~ the Project Director. Once ~~the survey is~~ approved, the JV will make~~s~~ the survey live for two weeks using Survey Monkey. A link to the online survey is emailed to meeting attendees after the event (Deliverable 10.3). After the survey closes, the JV delivers a final file with the survey results in Microsoft Excel format (Deliverable 10.4). This ensures that the JV gathers attendee feedback, providing insights for enhancing future meetings.

4.11 Task 11: Final Report [PWS 6.11]

To prepare the post-meeting final report for the PI Debriefing Meeting (Deliverable 11.1), the JV undertakes the following steps within the ~~8~~eight-week deadline post-meeting:

Table 5: Final Report Development Process

Step	Description
1	Use the previous PI Meeting's final report as a template for structure and content expectations.
2	Summarize accomplishments for each task, staff involved, any issues and their resolutions, and the impact on the contract.
3	Summarize the accomplishments for each task, detail the staff involved, describe any issues encountered and their resolutions, and the resultant impact on the contract.
4	Compile recommendations for future meetings based on survey feedback and the team's expertise.
5	Assemble an electronic dossier of all documents produced for the PI Meeting.

The final report (Deliverable 11.2) is reviewed to ensure it meets quality standards before submission. Through this process, the JV delivers an informative report that serves as a tool for future planning.

4.12 Task 12: Travel Support for Invited Speakers (Optional) [PWS 6.12] [Authored: Vanessa Bridges]

The JV Logistics Coordinator arranges all travel for Meeting Program Co-Chairs and sponsored participants with support from ~~a reputable~~ travel vendor, AdTrav Travel Management. This involves booking travel arrangements at least two months prior to the meeting date (Deliverable 12.1). Upon booking their flight and securing their lodging, the Logistics Coordinator will issue a logistics fact sheet with all confirmation details, meeting venue address, travel support contact information, and details regarding per diem rates and allowable reimbursable expenses. For traveler convenience, the logistics fact sheet is combined into one PDF with the confirmed travel itinerary, ~~into one PDF~~ providing a portfolio with all travel details. In addition, the Logistics Coordinator guarantees that all sponsored participants receive their honorarium of up to $1,000 for their contributions~~,~~ with the commitment to issue payments no later than two weeks following the conclusion of the meeting (Deliverable 12.2).

4.13 Task 13: Virtual Meeting Support (Optional) [PWS 6.13] [Authored: Samara Vasquez]

In alignment with ~~our~~ the approach to managing the PI Meeting, ~~we are~~the JV is ~~fully~~ prepared to transition the event to a virtual format if required. This preparation ensures we can support up to 2,000 participants virtually. ~~Our~~ The JV's services include assisting IES in choosing and overseeing~~to choose and oversee~~ a virtual meeting platform that not only facilitates live and recorded sessions, live interactions, and streaming but also adheres to Section 508 accessibility standards, providing closed captioning for all sessions (Deliverable 13.1). The JV-suggested platforms ~~we~~ to select ~~suggest to select~~ from are Cvent's Event Hub and Webex Events (formerly Socio). ~~and are~~The JV is prepared to conduct demos of both and guide IES in selecting the best suited one for the virtual meeting.

Beyond the technology, ~~we~~ the JV coordinates with presenters to ensure the smooth execution of live and recorded presentations. This involves helping them prepare their home studio for optimal display and sound, as well as ~~provide~~ providing guidance on presenting in a virtual setting. Prior to the event, ~~we~~ the JV hosts dry run sessions where presenters can see their presenter view when logging on to the platform and get firsthand experience of the virtual green room. ~~We~~ The JV ~~also~~ offers support throughout the event with established back-channel communications via text or private message via the video engine. ~~Our~~ The JV's plan encompasses the facilitation of up to 36 breakout sessions, featuring interactive Q&As. ~~We~~ The JV will also establish a virtual helpdesk to support attendees who need added assistance logging into or navigating the virtual platform. Furthermore, ~~we~~ the JV will manage three key virtual plenary sessions, maintaining a high level of engagement throughout the meeting.

To foster interactivity, ~~we~~ the JV will set up virtual networking spaces. An attendee directory will be available, featuring messaging capabilities while ensuring privacy and providing opt-out options. All recorded content is made available after the event, in compliance with accessibility and privacy regulations (Deliverable 13.2).

5. Key Personnel [Authored: Cecilia Andersen]

Table 6~~,~~ below~~,~~ lists ~~our~~ the key personnel. Their resumes are provided in Appendix A.:

Table 6. Key Personnel

Position Title	Name
Project Director	Cecilia Andersen
Senior Meeting Planner	Sancta Watley
Logistics Coordinator	Vanessa Bridges
IT/Technology Manager	Stephen Mossner
Education Research Lead	Stephen Coleman

6. Project Management Methodology [Authored: Cecilia Andersen]

~~Our~~ The JV's Project Management methodology is based on the Project Management Institute/Project Management Body of Knowledge (PMI/PMBOK) processes, internal controls, and tools. ~~We are~~The JV is committed to ISO-9001-2015 standards to support our culture of excellence. Our Senior Meeting Planner, ~~who is~~ a Project Management Professional, will ~~be~~ establish ~~ing~~ the project management tools and procedures for the team for the entirety of the contract year ~~to have an~~for an efficient streamlined process throughout.

6.1 Proposed lines of communication, responsibility, and authority for planning, execution, and management ~~,~~ ~~of~~ the tasks/subtasks in the PWS.

Our lines of communication are outlined in the organizational chart in Section 6.3. The Project Director is our primary point of contact with the COR and oversees the project team. The Project Director is supported by the JV's Project Management Office. Planning, execution, and management are the primary responsibilities of the Project Director, who allocates duties at the task and subtask level.

6.2 Proposed policies and procedures for managing and directing the effort for cost control and cost management.

The JV has proven experience planning, controlling, and managing cost, schedule, and performance on similar requirements with other ~~Federal~~ federal customers. ~~We~~ The JV attributes ~~our~~

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success to placing highly ~~the right~~ skilled people ~~with the right skills~~ in the right positions with the proper level of supervision with access to our corporate resources when needed. Our Project Director oversees, controls, and develops work plans and monitors day-to-day operations. ~~We~~ The JV uses SharePoint and Trello to monitor, manage, and control schedules and performance activities, ~~as well as~~ and report essential costs. ~~Our~~ The JV's management tools simplify contractual compliance to improve visibility into performance, projected versus actual cost, budget, schedule, deliverables, asset management, training, and certification status. The following highlights the features and benefits of our management approach.

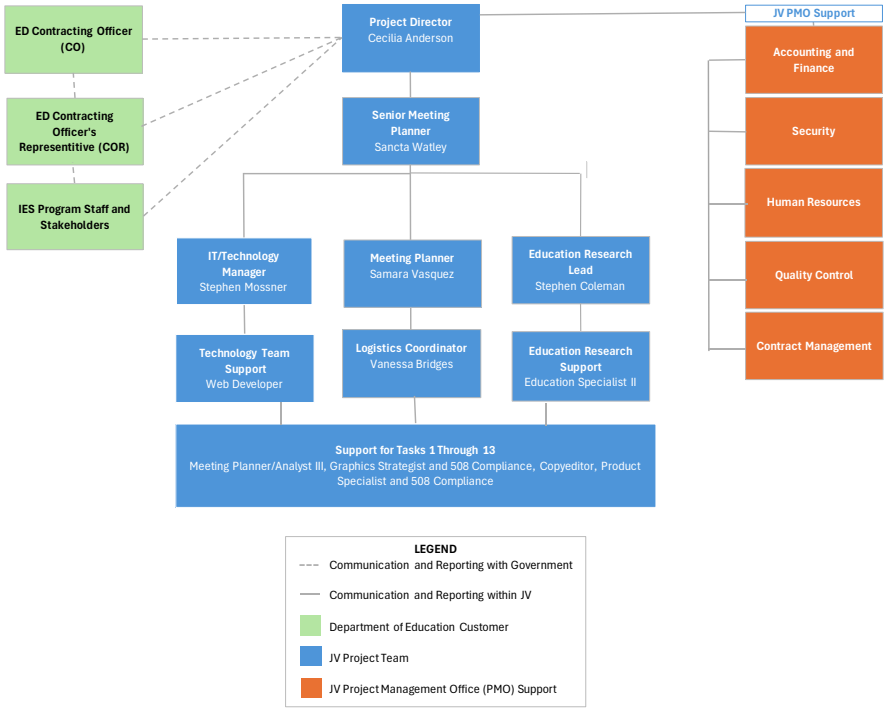
Table 7. Management Features and Benefits

Feature	Benefits
Trello to communicate tasks among team and provide full transparency to client on status of tasks and individual outputs.	Trello offers an intuitive interface and real-time collaboration features, enabling teams to efficiently organize tasks and track progress on a visual board, thus streamlining workflows and communication.
SharePoint site to effectively support planning and meeting functions including registration, hotel accommodations, travel plans, and related functions.	Secure, web portal allows authorized personnel to access and monitor participation, cost, schedule, and performance in near real-time.
Management process developed based on ISO quality standards, and PMBOK 5th Edition.	Disciplined processes minimize potential cost, schedule, and performance risks.
Standardized, repeatable processes used to effectively manage contracts.	Minimizes cost, schedule, and performance risks resulting in meeting success.
Highly automated management environment, leveraging capabilities of web-based collaborative tools.	Promotes effective team and participant communications to enhance mission success.
Robust risk management: early issue detection and flexibility to accommodate diverse tasks.	Limits potential impacts to cost, schedule, and quality performance.
Significant internal pool of experienced and certified meeting planners.	Permits rapid staffing for urgent needs or contingencies to ensure continuous performance.
Open communication via lean contract management structure with clear lines of authority and communication.	Easy access to top-level corporate management to resolve high-level program issues.

6.3 Organizational Structure

Below is ~~our~~ the JV's organizational chart, ~~outlining~~ showcasing the lines of communication, and who will be filling each role. Full resumes for key personnel will appear in the Appendix.

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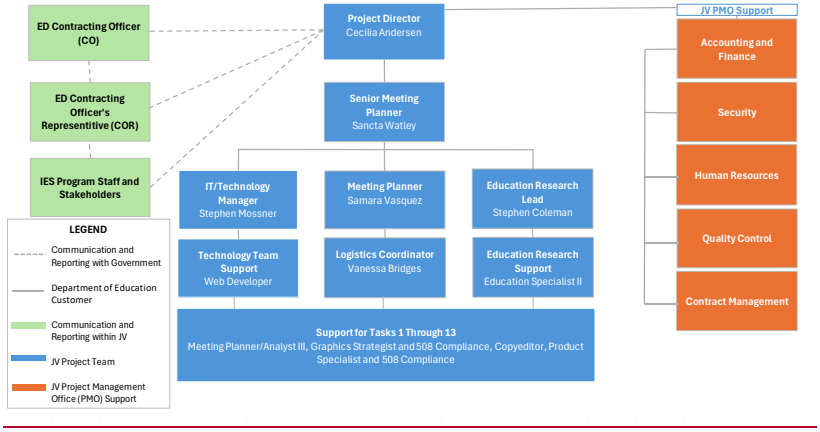


Figure 1: Proposed Organizational Structure and Staff.

6.4 Level of effort invested in the project by each staff person

Table 8 ~~,~~ below~~,~~ outlines the ~~our~~ team members' hours allocated for this project. The JV has ~~For each individual, we've~~ included each person's ~~their~~ Labor Category, which tasks they'll be assigned to, the total number of hours allocated to the project, and their percentage as a full--time equivalent on this project. ~~Our~~ Key Personnel on this project, Cecilia Andersen, Sancta Watley, Vanessa Bridges, and Stephen Coleman, are included, ~~as well as~~along with non-key project team members.

Table 8: Project Team Members Hours

Staff / Consultant	Labor Category	Task	Total Hours	% FTE on this Project	% FTE on All Other Projects
Cecilia Andersen	Project Executive/ Project Director	1,2,3,4,5,6,7,8,9,10,11	451	24%	75%
Sancta Watley	Program Analyst IV/ Senior Meeting Planner	1,8	84	4%	*
Vanessa Bridges	Program Analyst III/Logistics Coordinator	1,2,3,4,6,7,8,10,11	360	19%	75%
Samara Vasquez	Program Analyst III	1,2,3,4,5,6,7,8,9,10	430	23%	65%
Steve Mossner	IT Technical Lead/IT Technology Manager	1,3,4,5,9,11	182	10%	*
Matt Fairbanks	Web developer	3,6	140	7%	65%
Stephen Coleman, Ph.D.	Education Specialist IV/Education Research Lead	1,3,4,5,8,10,11	225	12%	*
Elizabeth Davis	Education Specialist II	4,5,10	94	5%	*
Christine Porter	Graphics Strategist & 508 Compliance	1,3,5,6,7,8,11	205	11%	85%
Laura Kelly Wells	Copyeditor	1,3,4,5,6,7,8,9,10,11	134	7%	90%
Rita Christopher	Production Specialist & 508 Compliance	9	100	5%	90%

* Consultant, please see letters of commitment

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7. Use of Subcontractor and Consultants [Authored: Cecilia Andersen]

The JV is working with the following subcontractors on this requirement. Their Letters of Intent and Conflict of Interest Certificates are provided in Appendix B.

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Table 9. Subcontractors and Consultants

Subcontractor Name	Role
Consulting Staff Members	Select members of our proposed team are consultants, rather than full-time employees of respective JV parties. Letters indicating their willingness to serve (letters of intent), and Conflict of Interest Certificates are included in ~~appendix~~ Appendix B. The staff members who are consultants are Senior Meeting Planner Sancta Watley, IT Technology Manager Stephen Mossner, Education Research Lead Stephen Coleman, and Education Specialist II Elizabeth Davis.

Appendix A: Key Personnel Resumes

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Project Director, Cecilia Andersen (CGMP, CMP Pending)

EMPLOYMENT HISTORY		
Organization	**Title**	**Years Active**
DC Global Planning; LLC	Founder & CEO	2017 – Present
Manhattan Strategy Group	Project Director	2019 – Present
The National Endowment for Democracy	Project Manager	2007 – 2014
The Initiative for Inclusive Security	Policy Associate	2005 - 2007

PROFESSIONAL EXPERIENCE HIGHLIGHTS

DC GLOBAL PLANNING, LLC

- Serves as master conference and meeting planner offering domestic and international event management with access to a global events industry network through Meeting Planners International.
- Extensive experience managing all event logistics and operations, from identifying and securing event venues, to contracting and overseeing vendors, executing the events onsite and overseeing staff, as well as managing the budget and handling post-event reconciliations and reporting.

MANHATTAN STRATEGY GROUP

- Managed the scope of the ED National Center for Education Research (NCER) -/- Research Programs in Special Education (NCSER) grantee meetings that host 800+ educational researchers from across the United States. Responsible for securing large plenary rooms as well as additional breakout rooms. Ensured that each room is properly equipped with conference materials such as a podium, microphones, LCD projector, large screen, tables for materials, laptops for presentations, and free wireless internet access.
- Orchestrated planning and execution of Education Innovation and Research Project Directors and Evaluators Technical Assistance meeting in 2020 convening 300 attendees in a virtual setting over three days. Oversaw speaker management for over 70 presenters including planning meetings, conducting audio-visual tests, providing tips on presenting in a virtual setting, developing Section 508 compliant presentation templates, processing honoraria for sponsored presenters, and executing dry rehearsals. Secured staff for "onsite" execution to include meeting planners, virtual help desk support, session facilitators, web hosts, and speaker points of contact, among other key roles.
- Supported the ED Closing the Broadband Gap for Students program. Provided logistical support for in-person and virtual meetings. Duties included scouting and securing meeting venues, managing all technical aspects of conducting virtual meetings, preparing content, ~~and~~ sending information and material for review, taking notes, ~~and~~ compiling all feedback received from the

meetings, and communicating with guest speakers.

THE NATIONAL ENDOWMENT FOR DEMOCRACY

- Managed all aspects of logistics for biennial global assemblies uniting 450+ democracy activists in Ukraine (2008), Indonesia (2010), and Peru (2012). Developed planning timeline, scouted, and secured event venue, contracted, and managed all local vendors (event planner, security, press, performers, etc.), collaborated with local partners, hired local staff, executed conferences onsite, and managed budget.
- Managed budget for assemblies in three different countries. Developed budget forecast, maintained budget, liaised closely with the finance department, planned and tracked invoices, prepared financial reports for quarterly board meetings, and handled final reconciliation. Additionally, sourced in-kind contributions and identified volunteers to reduce project costs.
- Managed event staff and volunteer team of 30+ people for 4four-day conferences. Identified and assigned staff event responsibilities, developed staff schedule, developed staff event handbook (floor plans, staff schedules, emergency contacts, event program, meal plans, etc.), conducted pre-event staff meetings, oversaw staffing throughout conferences, and most importantly, ensured staff and volunteers were appropriately recognized for their hard work.
- Coordinated semi-annual Steering Committee (leadership board) meetings in Washington, D.C., and abroad uniting 30 high-level international leaders aimed at advancing democracy across the globe. Drafted logistics memos; compiled meeting materials; and secured banqueting service, meeting venue, and hotel accommodations, in addition to assisting with travel arrangements.

THE INITIATIVE FOR INCLUSIVE SECURITY

- Coordinated annual conference for 400+ participants and 25 international delegates in Washington, D.C. This included handling all logistics, forecasting expenses, managing the budget, and overseeing the event team.

EDUCATION		
Degree	**Institution**	**Year**
MA, International Affairs	American University	2005
BA, Political Science with International Relations focus Minor: French Language	University of Central Florida	2002

Senior Meeting Planner, Sancta Watley, PMP

EMPLOYMENT HISTORY		
Organization	**Title**	**Years Active**
S/E Management Group (Core client Manhattan Strategy Group)	Project Director	2014 – Present
ICF International	Project Manager	2020 - 2022
Seamon Corporation	Project Director	2010 – 2011
EDJ Associates, Inc.	Senior Program Manager	2005 - 2010

PROFESSIONAL EXPERIENCE HIGHLIGHTS

S/E MANAGEMENT GROUP, LLC

- Managed multiple human development projects (health, education, youth, workforce development, and information systems), fostering community engagement and negotiating with vendors/subcontractors. Created strategies to steer successful project execution, from implementation to closeout. Developed workplan structures and project schedules to ensure timely, cost-effective, and quality execution of client solutions. Planned, organized, and developed technical training materials for event services, including presentations, curriculum for new staff, policies, and procedures. Complied with the organization's ethics, standards, and objectives and supported teams in their adherence to project and program requirements.
- Managed the scope of the ED National Center for Education Research (NCER)-/-Research Programs in Special Education (NCSER) PI meetings that host 800+ educational researchers from across the United States. Responsible for securing large plenary rooms as well as additional breakout rooms. Ensured that the schedule of deliverables stayed on track, providing expert guidance to the client planning team throughout each phase of meeting planning, implementation, and evaluation.

ICF INTERNATIONAL

- USAC administered the FCC's Rural Health Care (RHC) program designed to bring world-class medical care to rural areas through increased connectivity. As Project Manager, she ~~lead~~led a team of up to 60 staff in conducting high-~~-~~quality grant reviews, ~~implement~~implementing lessons learned to improve efficiencies and reduce error rates while maintaining high-~~-~~quality benchmarks and deliver exceptional customer solutions. Successfully recruited, hired, and trained a team of reviewers without prior expertise to clear a backlog of ~10,000 grant applications within four months for two different programs with distinct requirements.
- Reviewed and validated over $180 million in funding awarded to hospitals and community health centers for Funding Year (FY) 2021.
- Improve efficiencies and reduce error rate by 30% by implementing lessons learned from FY20,

while maintaining high--quality benchmarks.

- Ongoing review of over 20 agency procedures to ensure reviewer quality proficiency maintains over 90% and implement corrective knowledge plan, as necessary.
- Awarded follow-on work for FY21 to review over 9,000 grant applications (estimated funding of $102 million) due to the initial project success.

SEAMON CORPORATION

- Succeeded in directing all aspects of contract management and performance for long- and short-term projects of various complexity. Led and mentored teams, providing training, professional development, and performance assessments. Managed daily operations and work assignments for the event services unit. Oversaw financial aspects of assigned projects by reviewing monthly invoices to ensure accuracy, compliance with contract provisions and Federal Acquisition Regulations (FARs), and safeguarding sensitive information. Performed quality reviews. Identified and addressed potential risks for all programs/-projects through strategic planning improvements and developed contingencies when planning. Monitored and adjusted plans during ongoing stakeholder engagements. Reviewed technical work and provided project reports and regular client updates.

EDJ ASSOCIATES INC.

- Played a key role in designing, developing, and delivering corporate-wide training and product specifications for staff on conference policies, procedures, and practices designed to ensure quality, thoroughness, and efficiency in project execution. Used analytical and problem-solving skills to develop solutions to enhance efficiencies and cost-effectiveness on existing projects. Managed proposal efforts including conceptualization, teaming, staffing, writing, and submission. Recruited personnel and conducted consistent training activities in accordance with the company's practices. Provided day-to-day support to teams, communicating, and overseeing adherence to contract requirements and gGovernment regulations. Monitored monthly costs.

EDUCATION	
Degree	**Institution**
M.A., Counseling	Regent University
B.A., Business Management and Transportation	Florida Memorial College

Logistics Coordinator, Vanessa Bridges

EMPLOYMENT HISTORY		
Organization	**Title**	**Years Active**
Strategic Results	Meeting Planner	2023 - Present
Bridges & Planners, Meeting and Event Planning	Project, Meeting, and Event Manager	2009 - Present

PROFESSIONAL EXPERIENCE HIGHLIGHTS

Freelance Project, Meeting and Event Manager

Bridges & Planners, Meeting and Event Planning

Kensington, MD, 2009-present

- Overall management and support including successful coordination of annual conferences, education summits,~~;~~ membership meetings, and special events for local and national professional organizations, growing membership, and increasing non-membership attendance (up to 200%) at events exceeding 30,000 attendees and surpassing goals by more than $50,000 in proceeds. Onsite ~~site~~ manager. Registration Staff Supervisor.
- Speaker/VIP/Membership Management ▪ Successful coordinator of speaker and program participant arrangements and logistics, including searches, tracking forms, registration, bios, photos, presentation assistance, audio-visual (AV) requirements, and room blocks. Adept with membership and event databases.

Select Bridges & Planners Extended Term Contracts and Clients:

American Society of Landscape Architects, Washington, DC

Education Program Manager

- Manage the Landscape Architecture Continuing Education System (LA CES), including overseeing two volunteer committees, database management, liaising with currently active continuing education providers and recruiting potential new providers, administering an annual provider audit, and reviewing over 1200 courses.
- Collaborate with staff to carry out the annual meeting, advising presentation submitters, coordinating with the review committee, and assisting in session selection and scheduling.
- Manage annual meeting speaker relationships for over 400 speakers, including arranging housing, creating, and distributing email messaging and webinars, and developing and maintaining the speaker management site.
- Coordinate logistical needs of 150 education sessions for the annual meeting, including audiovisual needs, coordination with vendors, and submission to six professional organizations for session credentialing.

U.S. Department of Veterans Affairs/OSDBU, Washington, DC
Federal Security Clearance: Public Trust
Subject Matter Expert (OSDBU/NVSBE Event Planner)

- Provided subject matter expertise in the planning, management, and implementation of the National Veterans Small Business Engagement conference (3,500 attendees) and related outreach events.
- Managed Call for Papers and Learning Session Speaker process for over 200 Presenters and presentations.
- Organized volunteer program, related templates, schedule, and onsite activities. Recruited over 100 Volunteers.
- Established process and managed national anthem, color guard ceremony, and missing soldier ceremony.
- Registration and individual attendee matching and session scheduling for 3,500 participants.

National Association of Veterans' Research & Education Foundation (NAVREF), Chevy Chase, MD
Conference Planner

- Directed logistical planning including RFP management, F&B and AV hotel negotiation, and room block supervision.
- Managed program development and created a timeline in collaboration with NAVREF Board and Program Committee.
- Scheduled and managed 50 speakers, including logistics, bios, photos, ~~power point~~PowerPoint assistance, and AV needs.
- Registration Manager (Regonline) for annual association conference for 1500.
- Onsite ~~site~~ point ~~-~~of ~~-~~contact for members, guests, speakers, sponsors, exhibitors, team, ~~-~~and hotel staff.
- Developed informative promotional materials, meeting materials, awards, handouts, and badges.
- A $100,000 ~~Budget~~ budget resulted in a $7,500 ~~Profit~~ profit from budget management and reconciliation.

EDUCATION	
Degree	**Institution**
Bachelor of Arts in English	Vassar College
Certificate in Meeting Planning	Goucher College
Event Management Certificate Program	Montgomery College

IT/Technology Manager, Stephen Mossner

EMPLOYMENT SUMMARY

Mr. Mossner possesses excellent communication, coordination, and problem-solving skills and the outstanding ability to work and deliver team projects on or before schedule. He has more than 25 years of experience designing, maintaining, and troubleshooting web applications written in ASP, ASP.Net, and PHP. Mr. Mossner is adept at implementing websites with third-party open-source Content Management Systems such as Drupal and WordPress. He has a deep understanding of database design and queries and expert knowledge of 508 compliance.

PROFESSIONAL EXPERIENCE HIGHLIGHTS

Government Experience

- **Department of Health and Human Services,** Administration for Children and Families, Agency for Healthcare Research and Quality, Centers for Disease Control and Prevention, Health Resources and Services Administration, Office of the National Coordinator for Health Information Technology, National Institutes of Health, Substance Abuse and Mental Health Services Administration
- **Department of Commerce**, National Institute of Standards and Technology
- **Department of Defense**, U.S. Army Institute of Chemical Defense; National Geospatial-Intelligence Agency
- **Department of Homeland Security,** Federal Emergency Management Agency

Relevant Experience

National Cancer Institute Drupal CMS Website Creation and Maintenance

- Office of Biorepositories and Biospecimen Research (http://biospecimens.cancer.gov/)
- The Cancer Human Biobank (http://cahub.cancer.gov/)
- Innovative Molecular Analysis Technologies (http://imat.cancer.gov/)
- Alliance for Nanotechnology in Cancer (http://nano.cancer.gov/)
- Physical Sciences in Oncology (http://physics.cancer.gov/)
- Center for Strategic Scientific Initiatives (http://cssi.cancer.gov/)
- Clinical Proteomic Technologies for Cancer (http://proteomics.cancer.gov/)
- Nanotechnology Characterization Laboratory (http://ncl.cancer.gov/)
- Office of Physical Sciences-Oncology (http://physics.cancer.gov/)

National Committee on Vital and Health Statistics (NCVHS) and the Board of Scientific Counselors (BSC), Centers for Disease Control and Prevention

- Provides technical and administrative support ~~of~~ for the NCVHS website, including website design and maintenance services.
- Assist in maintaining a current and accurate website, posting letters, documents, and reports.
- Tasks include translating NCVHS documents into HTML and/or Adobe PDF format, adhering to

508 compliance requirements, and ensuring website design elements are current and adhere to 508 compliance guidelines.

- Enhance features as trends dictate and implement improvements to the website design.

Agency for Healthcare Research and Quality (AHRQ) Speaker Database

- Designed, developed, and managed a web-based tool that allows AHRQ employees to log in and enter speaker data for the annual AHRQ meeting.
- The speaker database tool also allows event coordinators to assign speaker session information to their records each year.

CERTIFICATIONS

- Webmaster Graphics ~~And~~ and Layout, Delta College
- Webmaster Certification, Delta College
- Information Security ~~And~~ and Privacy Awareness, National Institutes ~~Of~~of Health

EDUCATION

Degree	Institution
Bachelor of Science in Computer Information Systems/Computer Science	Saginaw Valley State University
Associate Degree, Computer Science and Information System	Delta College

Education Research Lead, Stephen Coleman, Ph.D.

EMPLOYMENT HISTORY		
Organization	**Title**	**Years Active**
Close Up Foundation	Owner	2002 - Present
Moreland University	Lead Planner	1991 - 2018
Takoma Park Elementary School	Lead Planner	2016 – Present
Manhattan Strategy Group		
Coleman Educational Consulting	Research Consultant	2015 – 2017
Policy Studies Associates, Inc.	Senior Research Associate	2008 – 2008
Center for Urban Environmental Research and Education, UMBC	Research Analyst and Education Coordinator	2001 – 2003
Abell Foundation	Education Program Officer	2000 – 2001
St. Paul's School for Girls and Milford Mill High School	Teacher	1994 - 1999

PROFESSIONAL EXPERIENCE HIGHLIGHTS

CLOSE UP FOUNDATION

- Taught civic engagement issue-centered lessons to groups of middle school students. -Facilitated respectful and productive group deliberation on current issues. Provided oral and written constructive feedback to help students continuously improve.

MORELAND UNIVERSITY

- Taught research methods class online to master level education students. -Provided oversight of students' Capstone research projects. Provided overview of qualitative and quantitative methods and components of educational research. Designed and taught weekly classes and graded students' work.

TAKOMA PARK ELEMENTARY SCHOOL

- Worked with teachers and administrators to assist with classroom instruction and procedures during time of online/in class hybrid learning. Monitored that students were on task.

MANHATTAN STRATEGY GROUP

- Developed online survey, analyzed results, and wrote summary evaluation of the Institute of Education Sciences' yearly Principal Investigators conference. Monitored and provided technical assistance to an adult educators' virtual community sponsored by the National Center for Education Statistics. -Conducted research in adult education. Presented at regional conferences.

COLEMAN EDUCATIONAL CONSULTING

- Provided educational consulting and technical assistance to non-profit organizations. Conducted quantitative and qualitative evaluation of Global Kids DC, an enrichment program for high school students.

POLICY STUDIES ASSOCIATES, INC.

- Designed and conducted evaluations and policy analysis in K12, post-secondary, and adult education. Worked closely with clients to design studies to determine the effectiveness of the program and ways to improve program.

AMERICAN INSTITUTES FOR RESEARCH

- Contributed to the evaluation of the Ohio School Transformation Initiative, an effort to transform large high schools into smaller schools. Conducted site visits and designed and wrote qualitative and quantitative reports.

CENTER FOR URBAN ENVIRONMENTAL RESEARCH AND EDUCATION, UMBC

- Developed educational units and activities for K-12 and after-school programs on environmental issues as they relate to an urban environment. Taught an urban indicators unit to Baltimore City school teachers.

ABELL FOUNDATION

- As program officer, researched and wrote reports on urban K through 16 education, assessed and oversaw educational grants, and monitored multi-year evaluations and studies of education initiatives.

ST. PAUL'S SCHOOL FOR GIRLS AND MILFORD MILL HIGH SCHOOL

- Taught seventh grade world history and sixth grade American history at St. Paul's School for Girls in Baltimore County. Implemented curriculum and program changes as a member of the Middle School Planning Committee. Taught tenth grade world history and twelfth grade government classes at Milford Mill high school in Baltimore County.

EDUCATION	
Degree	**Institution**
PhD in Public Policy with concentration in Education Policy	University of Maryland
MAT in Social Studies	John Hopkins University
BA in Government	Oberlin College

Appendix B: Consultant and Subcontractor Letters of Commitment and Conflict of Interest Certificates