



GROWTH CAPITAL NETWORK PROPOSAL

Response to RFP GMU-1821-22

Program Design and Event Management Services

Presented to:

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1. Procedural Information



Purchasing Department
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<http://fiscal.gmu.edu/purchasing/>



REQUEST FOR PROPOSALS GMU-1821-22

ISSUE DATE: July 5, 2022

TITLE: Program Design and Event Management Services

PRIMARY PROCUREMENT OFFICER: Erin Rauch, Assistant Director, erauch@gmu.edu
SECONDARY PROCUREMENT OFFICER: Jim Russell, Director, jrussell@gmu.edu

QUESTIONS/INQUIRIES: E-mail all inquiries to both Procurement Officers listed above, no later than 4:00 PM Eastern Time (ET) on July 14, 2022. All questions must be submitted in writing. Responses to questions will be posted on the [Mason Purchasing Website](#) by 5:00 PM ET on July 18, 2022. Note: Questions must be submitted in WORD format. Also see section III. COMMUNICATION, herein.

PROPOSAL DUE DATE AND TIME: August 2, 2022 @ 2:00 PM ET. SEE SECTION XIII.A.1 FOR DETAILS ON ELECTRONIC PROPOSAL SUBMISSION.

In Compliance With This Request For Proposal And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiations.

Name and Address of Firm:

Legal Name: Growth Capital Network

Date: 7/31/22

DBA:

Address: 4031 Thornoaks, Suite 100

Ann Arbor, MI 48104

By: Lauren Bigelow
Signature

FEL/FIN No. 36-4671763

Name: Lauren Bigelow

Fax No.

Title: CEO

Email: lauren@growthcap.net

Telephone No. 734-678-5161

SWaM Certified: Yes: _____ No: XX (See Section VII. SWaM CERTIFICATION for complete details).

SWaM Certification Number:

This public body does not discriminate against faith-based organizations in accordance with the *Governing Rules, § 36* or against a Bidder/Offeror because of race, religion, color, sex, national origin, age, disability, or any other prohibited by state law relating to discrimination in employment.

ATTACHMENT A
SMALL BUSINESS SUBCONTRACTING PLAN
TO BE COMPLETED BY OFFEROR

Offerors must advise any portion of this contract that will be subcontracted. All potential offerors are required to include this document with their proposal in order to be considered responsive.

Small Business: "Small business (including micro)" means a business which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date and time for proposals. This shall also include DSBSD certified women- owned and minority-owned businesses and businesses with DSBSD service disabled veteran owned status when they also hold a DSBSD certification as a small business on the proposal due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify.

Certification applications are available through DSBSD online at www.SBSD.virginia.gov (Customer Service).

Offeror Name: Growth Capital Network

Preparer Name: Lauren Bigelow **Date:** 7/31/22

Who will be doing the work: ☐ I plan to use subcontractors ☒ I plan to complete all work

Instructions

- A. If you are certified by the DSBSD as a micro/small business, complete Section A of this form.
- B. If the "I plan to use subcontractors" box is checked, complete Section B of this form. For the proposal to be considered and the offeror to be declared responsive, the offeror shall identify the portions of the contract that will be subcontracted to any subcontractor, to include DSBSD certified small business for the initial contract period in relation to the offeror's total price for the initial contract period in Section B.

Section A

If your firm is certified by the DSBSD provide your certification number and the date of certification.

Certification Number: _____ Certification Date: _____

PAYMENT PREFERENCE

Growth Capital Network's preference is option#3 Net 30 Payment Terms. We will enroll in Paymode-X where all payments will be made electronically to our bank account.

2. Qualifications & Experience

2a. Background and brief history of Growth Capital Network

Growth Capital Network (GCN) is a woman owned and woman led strategic management, research, and innovation consulting firm – focused on programs that serve angel/venture investors, high-tech, high-growth startups, student innovation, and economic development. Our collaborative approach, depth of professional experience and practical nature assist our clients to create impactful programs from the strategy and framing through to execution and community engagement/building.

We have a deep expertise in building high quality conferences and platforms in the North American investment ecosystem. We leverage our rolodex of pre-seed, seed, and A/B round venture investors to evaluate, judge, mentor, and attend our competitions, conferences, and programs. GCN's team guides clients through customized processes to meet the program milestones and create the largest measurable impact.

Program and project management expertise

Development and execution of regional and national projects

- *Manage the process of top tier programs*
 - o *Develop framework and curriculum*
 - o *Produce marketing and PR plans*
 - o *Create a framework for financial planning and analysis*
 - o *Write agendas and responsibilities*
 - o *Create RFPs, vet and contract vendors*
 - o *Execute the project plan*
 - o *Document lessons learned; modify as needed*
- *Items specific to multifaceted competitions*
 - o *Develop full program*
 - o *Manage technology pipeline - from eligibility and FAQ through to awards*
 - o *Engage key stakeholders*
 - o *Develop partner networks*
 - o *Create a program strategy for development and technical assistance*
 - o *Measure outcomes*

Current and former GCN clients include the American Water Works Association, Ann Arbor Area Community Foundation, Ann Arbor SPARK, Community Foundation of Southeast Michigan, DMC Foundation, MI – Energy Innovation Business Council, Energy Foundation, George Mason University, Global Detroit, Grand Valley State University, Great Lakes Protection Fund, Invest Detroit, MacArthur Foundation, Michigan Association of Health Plans, Michigan Economic Development Corporation, New Economy Initiative, Oakland University and the University of Michigan.

2b. Qualifications and experience of personnel to be assigned to work with Mason.

Lauren Bigelow, the CEO of Growth Capital Network (GCN) is a high-level executive with a career of innovative positions with ground-breaking organizations. In the last 20 years, she has designed and produced a range of high-quality programs and event for the investor, startup corporate, and development communities and raised more than \$25,000,000 to support those efforts. Lauren has a deep knowledge of complex multi-stakeholder engagement including corporations, foundations, and universities and proven success with building and managing complex, multifaceted projects and initiatives (see section 2d).

Lauren has sourced technologies for investment and/or acquisition with corporate partners (Masco, Dow, Ford) and is experienced with technology screening, having provided due diligence for hundreds of early stage companies. She is an advisor to multiple early stage investment funds with a focus on high-growth technologies. An active angel investor with a broad portfolio of early stage startups and successful exits, Lauren help to raise \$10 M of venture capital with Cleantech Group and was on the executive team of startup sold to Bloomberg L.P. in 2009.

Lauren has executed engagements with university Offices of Tech Transfer as well as federal labs and is a mentor to scores of tech startups and students in the IT, FinTech, AR, cleantech, and B2C sectors. She is an energy finance lecturer and MBA student advisor at the University of Michigan, Ross School of Business. Lauren has a BA from the University of Michigan, MA and PhD from Northwestern University.

Cassie Coravos is the event program manager for the Growth Capital Network. She has 5 years of high-quality event management, working with a wide range of clients from large non-profits (Venture for America) to local organizations (Build Detroit). Cassie strives for excellent event execution and client satisfaction. She can successfully materialize the vision of our clients, while exceeding expectations at every opportunity with the ultimate endeavor to ensure that all attendees will return for the next year.

Cassie plans, directs, and coordinates catering. She selects menu items, schedules catering staff, arranges for facilities or equipment, and communicates customer/client needs to the appropriate personnel, directly supporting the needs/goals of the client. Cassie is also skilled at sponsor fulfillment, ensuring that the conference supporters have a professional and streamlined experience. Cassie has a BA from Northwestern University.

Ilda Racoma is research administrative support for the Growth Capital Network. She manages our correspondence with companies, partners, judges, and outbound marketing.

2c. References

*Pam Lewis, Senior Program Officer, Hillman Foundation, plewis1105@gmail.com 248-943-9487
Length of service: 2011 to 2022*

*Diane Bouis, US Program Director, MedTech Innovator, diane.bouis@gmail.com , 734-272-1348
Length of service: 2015, 2020 to 2021*

*Skip Simms, Senior Vice President, Ann Arbor SPARK, Skip@annarborusa.org, 734-646-3173
Length of service: 2010 to 2014, 2020 to 2022*

*Steve Wilson, Executive Director, EGI, University of Michigan, sbwilson@umich.edu, 734-274-0728
Length of service: June 2018 to 2022*

2d. List of past investor events managed by your company

Event	Organization	Years	Fundraising	Sponsor management	Catering management	Venue management	Company recruitment/selection processes	Student competitions	Prize money distribution	National/international investor relationships	Keynotes /speaking panels	Event marketing
Accelerate Investor Conference	George Mason University	2020-2022	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX
HealthSpark Accelerator	20Fathoms	2021	XX	XX		XX	XX		XX	XX	XX	XX
Invest360	Ann Arbor SPARK	2020-2022		XX	XX	XX	XX		XX	XX	XX	XX
Water Utility Energy Competition	American Water Works Assn	2017-2018			XX	XX	XX		XX		XX	XX
Vital Senior Innovation Competition	Ann Arbor Comm Foundation	2017-2018		XX	XX	XX	XX		XX		XX	XX
Greentech Entrepreneur Academy	Huron River Ventures	2011-2014	XX	XX	XX	XX	XX	XX		XX	XX	XX
Accelerate Michigan	Ann Arbor SPARK	2010-2016	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX
Cleantech Investor Conferences	Cleantech Group	2004-2008	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX
MI Growth Capital Symposium	University of Michigan	2002-2006	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX

3. Specific Methodology & Timeline

The overarching aim for this project is to provide an effective platform for George Mason University to launch the creation of a public/private innovation community that engages GMU with other educational institutions, municipalities, and policy makers as well as corporations and industry thought leaders. In this project we will bring together a strong pipeline of educational opportunities, engaging discussions, and potential keynotes for its programmatic sections as well as relevant companies, judges, and attendees for its company and student pitch competitions. GCN will work alongside the GMU internal team and assets to coordinate the website, marketing, social media, PR, logistics, development, signage/printing, logistics, and vendors.

In order to achieve this goal, GCN will take responsibility for the project management to:

- Develop an efficient approach for GMU to build and efficiently execute the 2.5 day event
- Work with the GMU team to determine the calendar milestones and program deliverables
- Create a project plan/calendar with responsibilities, dates, and deliverables
- Select menus, oversee all vendors, manage program budget and volunteer + paid staff.
- Work with GMU team to identify and secure speakers consistent with investor interests.
- Ensure that the key messaging highlights key domains consistent with Mason priorities.
- Create the infrastructure for the student and company competition outreach, judging and selection
- Act as the information nexus for applicants, competitors, vendors, and judges for the competitions
- Meet with Mason team and funders to deliver sponsor packages and help close sponsorships.
- Manage pre- and onsite registration, coordinate with GMU on all VIP access and needs.

AGENDA/PROGRAM CREATION – GCN will set a tentative agenda for onsite portion of event and work with partners to identify and create outreach to potential keynotes and panel sessions. After the initial speaker outreach from the closest contact, GCN will facilitate pre-event communications and coordinate with the event

manager who handles onsite travel, registration, and hotel. GCN will coordinate with GMU around thank you gifts and letters.

STARTUP ENGAGEMENT – Recruitment/engagement of a geographically, racially, and ethnically diverse set of Mid-Atlantic startups to apply and participate in the company competition. Create the application process with the event manager, market through partners and direct outreach, and work with SBDC on coaching/prepping the companies and engage them onsite at the event.

STUDENT ENGAGEMENT – Recruitment of a geographically, racially, and ethnically diverse set of students to apply and participate in the Accelerate Student competition. Create the application process, market through direct outreach to a database of schools across the DMV, and work with Mason/key companies on coaching/prepping the students and engaging them onsite at the event.

INVESTOR ENGAGEMENT – Recruitment of a geographically, racially, and ethnically diverse set of angel, venture, and PE investors to judge the early phases and attend the Accelerate company competition and event. Market through direct outreach and partner engagement to a personal database of investors contacts from across North America, creating onsite peer to peer networking opportunities, and engaging them onsite at the event.

PR/MARKETING – GCN will work with GMU marketing and an external PR team to ensure uniform messaging, coordinated outreach to the varied constituents and a consistent flow of information to the relevant audiences. We will work with the team on the different entrepreneur and investor channels as well as journalists that may have interest in the area. GCN will outsource the management of the event website and evaluation/judging software for the student and company competitions.

SPONSORSHIP – In partnership with GMU development and the event manager, GCN will coordinate and manage sponsorship opportunities. GCN will refine sponsorship parameters and (if desired) create a target list of opportunities. When sponsorships are confirmed, we will work with the event manager as the conduit to the promotion arm, coordinating with the GMU marketing/PR team. We will ensure that we have their ads, logos and any other relevant information for their onsite event visibility (booths, exhibits). GCN will then coordinate this with GMU, the onsite event manager (who will take care of registration, ribbons, etc.) We will also coordinate with GMU to manage thank you notes from the relevant parties.

FACILITY/CATERING – After the full needs are determined, GCN will work with GMU to research facilities, disseminate RFPs, and negotiate contracts. Should GMU have out of town speakers, GCN will negotiate judge/participant room rates and blocks with a designated hotel. We will also coordinate with the GMU event staff to take care of contracting catering – menus completed, site visits, food tastings.

VENDORS – GCN will create RFPs for AV, event managers, musicians, photographers and transport. We will help to choose vendors, negotiate contracts, and pass to GMU to execute and pay the contracts.

ATTENDEE MATERIALS – GCN will work with GMU to produce an attendee programs, registration materials, banners, signage and onsite visuals to ensure consistency. Local signage production will be the responsibility of the GMU team. GCN will work with both the marketing team and the event manager to coordinate custom event pieces (name badges, checks, awards, and judge/speaker gifts.)

VOLUNTEERS – GCN will work with GMU to solicit and train volunteers. We will put together the schedule, do a pre-event training call, create volunteer packets, and disseminate thank you letters.

REGISTRATION – GCN will manage attendee registration, assist with the software choice, set up, supplies, pre-event/onsite registration (staffing volunteers). GCN/event managers will register staff, volunteers, speakers, sponsors, student and company presenters and judges.

Activity timeline – October 2022 – October 2023

Full project completion: November 2023

Phase 1 – Prep

Nov 2022 – Jan 2023

- *Work with GMU to define parameters and project goals*
- *Identify critical deliverables and activities*
- *Finalize the project plan and timeline*
- *Create draft agenda*
- *Help the GMU team to identify non-profit partners and innovation targets*
- *Work with GMU team to create value prop for corporate partners and sponsors*

Phase 2 – Finalize Agenda/Launch Outreach

Feb – May 2023

- *Finalize event agenda flow – focus on target industries and top thought leaders*
 - *Work with GMU team to identify local list of targeted panels and speakers*
 - *Define event venues and complete contracts*
- *Work with GMU development to overlay sponsor targets with agenda items*
- *Work with GMU marketing and PR to coordinate budget, outreach and schedule*
 - *Launch website and other PR assets*
- *Create sponsor packets and outreach*
- *Draft text and outreach for speaker, panelist, and keynote invites; coordinate with GMU*
- *Choose and customize competition judging software*

Phase 3 – Event Outreach/Launch Company Competition

May – June 2023

- *Continue sponsor/speaker/partner outreach in coordination with GMU*
- *Open the company competition*
- *Initiate recruitment to pipeline of targeted applicants*
- *Coordinate marketing and PR outreach*
- *Navigate high potential applicants through the system*
- *Provide tech assistance and quality assurance for applications*
- *Work with core GMU team to select and prep judges*

Phase 4 – Event Outreach/Company Selection

July – Aug 2023

- *Continue sponsor/speaker/partner outreach in coordination with GMU*
- *Work with GMU to finalize selection criteria and set up judging panels*
- *Continue to coordinate with GMU marcomm team, messaging now focused on the chosen companies*
- *Weekly communication with competitors on the deliverables, dates, presentation reviews*
- *Schedule out local talent (SBDC) and teams with presentation boot camp*

Phase 5 – Launch Student Competition

Aug – Sept 2023

- *Frame, promote, and open the student competition*
- *Initiate recruitment to pipeline of targeted applicants*
- *Coordinate marketing and PR outreach to on-campus assets*
- *Provide tech assistance and quality assurance for applications*
- *Work with core GMU team to select and prep judges (local angels, sponsors)*
- *Draft onsite materials, signage, PR, thank you notes, any post-event outreach*

Phase 6 – Three Days of Onsite Events/Winner Selection**October 2023**

- Continue communication and engagement with all presenting companies, judges, and sponsors
- Work with GMU marcomm team on placed stories for increased buzz
- Wrap up all onsite materials; coordinate with GMU on production
- Finalize all divisions of labor between GCN, GMU, event manager, and vendors
- Assist with the recruitment and training of volunteers
- Create/execute attendee surveys

Phase 7 – Debrief and Reporting**November 2023**

- Provide attendee data that GMU, partners and sponsors need to communicate findings and insights
- Document lessons learned and programmatic modifications for 2022

4. Proposed Pricing

The flat project rate for one year of the project is \$150,000.

This does not include Mason event expenses such as

Selection/Event Software	\$25,000
Graphic design – website & onsite	\$8,900
Photography (2 day)	\$5,000
Audio Visual	\$35-40,000
Printing	\$3,000
Marketing collateral	\$5,000
Signage	\$3,500
Marketing/PR fees	\$55,000
Event/facility/catering	\$75,000
GCN staff travel	\$4,500
Transportation	\$4,000
Prize dollars	(GMU dependent)

5. Miscellaneous Questions

5a. Are you and/or your subcontractor currently involved in litigation with any party? **No.**

5b. Please list any investigation or action from any state, local, federal or other regulatory body (OSHA, IRS, DOL, etc.) related to your firm or any subcontractor in the last three years. **None.**

5c. Please list all lawsuits that involved your firm or any subcontractor in the last three years. **None.**

5d. In the past ten (10) years has your firm's name changed? If so, please provide a reason for the change. **No.**