



# Guidelines to Tendering and choosing the right Professional Conference Organisation (PCO)

## What is a PCO?

A PCO is a Professional Congress Organiser or Meeting Planner. They provide a professional service with a substantial investment in technology, systems, resources and facilities. A PCO advises, recommends, guides and executes a congress, meeting, event or convention in a professional manner.

## Guidelines to selecting a PCO

A PCO and an organising committee must work together as one team. The organising committee knows their industry or profession, the traditions of their meetings and the standard of expectations of their colleagues, whereas the PCO is the expert in understanding the millions of details involved in organising a conference. The two must come together and work together to the same objective - a successful meeting! A PCO is a professional service with a substantial investment in technology, systems, resources and facilities. A PCO advises, recommends, guides and executes. The primary responsibilities of the organising committee are program development and decision making based on recommendations of the PCO. Organising a conference is a long and exciting endeavour and it is well worth investing time in the first important step - the selection of your PCO.

A PCO can take care of as much of the planning or as little as you require. It is important to decide which of these services are required so that a tender document can be produced and circulated. A full range of services would be likely to include:

<ul style="list-style-type: none"> <li>• Assistance with congress bids</li> <li>• Venue research and feasibility</li> <li>• Advise and consultancy services</li> <li>• Help in defining objectives</li> <li>• Guidance on congress taxation liabilities</li> <li>• Preliminary outline plan</li> <li>• Draft income and expenditure budget</li> <li>• Finance consultancy - pre-finance, sponsorship, exhibitions, loans,</li> <li>• Registration fees</li> <li>• Book-keeping</li> <li>• Control of bank accounts, income and expenditure ledgers</li> <li>• Venue negotiation</li> <li>• Organisational structure</li> <li>• Meetings with organising committees</li> <li>• Liaison with production companies</li> <li>• Secretariat and office facilities, including</li> </ul>	<ul style="list-style-type: none"> <li>• Speaker liaison</li> <li>• Marketing and public relations</li> <li>• Venue management</li> <li>• Press office</li> <li>• Staffing on site</li> <li>• Social events</li> <li>• Liaison with airlines</li> <li>• Delegate transfers and on-site transportation</li> <li>• Closure of congress accounts</li> <li>• Post-event evaluation</li> <li>• Design and print (congress image)</li> <li>• Electronic information and design</li> <li>• Gifts and congress accessories</li> <li>• Insurance cover</li> <li>• Food and beverage</li> <li>• Décor and staging</li> <li>• On-site services - electronic message</li> </ul>
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mailing address <ul style="list-style-type: none"> <li>• Registration processing systems (both electronically and manually)</li> <li>• Scientific or technical programme support</li> <li>• Abstract handling (both electronically and manually)</li> <li>• Exhibition sales and management</li> <li>• Web design and management</li> <li>• Poster sessions</li> </ul>	systems, signs, security <ul style="list-style-type: none"> <li>• Audio-visual equipment</li> <li>• Simultaneous interpretation</li> <li>• Congress recording</li> <li>• Translation of congress documentation</li> <li>• Videoconferencing</li> <li>• Accommodation bookings</li> <li>• Tour programmes</li> </ul>
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## When do you need a PCO?

A PCO can be brought in at different stages during the planning process. It is recommended that a PCO be appointed as early as possible, as their experience and expertise can ensure you avoid the many pitfalls and unnecessary expenditure, which are frequently encountered during the early stages of congress planning.

In the earliest stages a PCO can offer advice, help, knowledge and administrative support in both venue research and feasibility, as well as in establishing a preliminary budget, short-listing suppliers, and developing a time line for the planning and organisation of your congress.

## Procedure

In order to identify the most appropriate PCO for your needs it is helpful to seek information from a number of companies. The process would normally involve various steps:

- Production of a tender document
- Obtaining of preliminary information on accredited PCOs
- Creating a shortlist of suitable PCOs
- Distribution of the tender document
- Evaluation of tender documents
- Reference checks on prospective PCOs (suggest both past and future events, and may be appropriate to contact a supplier such as a venue or hotel).
- Presentation and interview
- Selection of PCO

## Assessing Tender Submissions

The major questions you need answered are:

- What are the services the tenderer has to offer?
- Who/What are the referees and track record of the tenderer?
- What staff / resources are available?
- Is the tenderer financially and generally a stable entity?

The tenderer's response to the '*Condition of Appointment of a PCO*' will give you the essential information to gauge that the experience and solidarity of the tenderer is appropriate to your requirements. Of course, if it is viable, a visit to the tenderer's offices will always assist in this assessment. Reference checks should also be conducted at this time.

In assessing your tender responses, attention should be focused on the response to the '*Requirements of the PCO*' section. It is in this section that the tenderer should detail their understanding of what is required under the various headings. The tender submission should therefore demonstrate that the tenderer understands the tasks involved as well as demonstrating that they have the resource capability and know how to achieve the desired outcomes.

## Pricing Structure

In order to be able to compare the companies on a sensible basis it is helpful to include information on how you require fee structure to be quoted. There are many ways in which a PCO charges for its services. You should be clear on whether you wish the fees to cover all the services or whether you require separate fees to be quoted for different services. These can be quoted in a number of ways.

- A fixed management fee
- A management fee per delegate
- A management fee per abstract/presentation handled
- A management fee per square meter of exhibition
- Profit share/underwriting
- Exhibition and sponsorship
- Registration
- Accompanying person fee

It is prudent to ask each company to outline any additional charges. Some companies also make additional service charges on other budget items such as mailings, telephone, fax, e-mail, general stationary, additional staff costs or take commission from suppliers. Such services likely to include commissions may be accommodation.

It is advisable to ask companies to outline their policy on these matters as they are an indirect form of income for the PCO and, therefore, equate to part of their charges.

## Creating a Shortlist of Suitable PCOs

In order to identify PCOs that may be suitable for the management of your event it is important to establish some broad criteria/guidelines such as:

- General experience with similar congresses (size, type)
- Image & reputation
- Affiliations to professional memberships/associations
- Regional experience / coverage
- Number of years in operation

## Presentation and Interview

Following the assessment of tenders it is usual to proceed with interview of those tenderers deemed suitable. It is normal practice to ask companies to make a short presentation on their services to the Organising Committee and/or International Association. In general terms, 10-20 minutes is sufficient for the presentation, with 30-45 minutes allowed after the presentation for the company to answer any questions you may have. When selecting companies for interview it is important to let them know which, if any, particular issues you wish them to address in their presentation. This is the time when you must assess which company offers the most appropriate service at the most competitive price. It is recommended that appointments be made at 1 - 2 hour intervals to allow for over-run on the allocated time and note-making/discussion after each interview. Interviews and visits to PCO offices can be regarded as part of the education process for the organising committee. Therefore, do not be afraid to ask probing questions.

There are also some fundamental issues, which should be addressed:

1. Does the company have a proven track record in organising your type of event e.g. corporate, association or government?
2. Does the company have a proven track record in organising events of a similar size and in similar venues?
3. Is the company financially sound and do they have a sensible amount of forward business to suggest they will continue to be so?

4. Is the company involved in any legal issues or financial disputes with past clients?
5. What is the company's core business? Many travel agents, tour companies, public relations consultants etc offer congress organising services. A PCO, however, has no conflicting interests, the main activity of the company being that of congress organisation resulting in greater experience and skills in this area.
6. Is the company sufficiently advanced technologically to handle the requirements of your event? Electronic communication and submission of abstracts/papers and registration are an essential part of today's congress organisation.
7. Is the company's staff sufficiently experienced to be able to handle your event?
8. Who is responsible for the finances of the event and who controls the accounting? It is important to ensure that, unless there is an agreed financial arrangement, any congress income remains your property and that you have the right to make financial decisions.
9. What procedures are in place should unforeseen circumstances affect key congress staff involved in the event immediately prior to the congress (sickness, accident etc).
10. If industry income is important to the financial success of your event, does the company have a proven track record in raising sponsorship and selling exhibition space?
11. Does the company sub-contract any of the services that they claim to offer?
12. Does the company belong to any professional associations and are these relevant? Many associations allow membership in exchange for a subscription and do not uphold any form of professional standards.
13. Is the company quality assured?
14. What is the company's environmental policy?
15. What reporting relationships will be established and how are these documented?

## Appointment

The PCO you select will be the one who most clearly matches your requirements and with whom you feel you will be able to work in partnership. It is also important to know with whom you will be working and it is recommended that a visit be made to the office of the PCO to meet the team who may be assigned to you. Once you have selected your preferred tenderer you should discuss any remaining issues/points to be agreed and issue a Letter of Appointment. A formal contract is usually then completed but this may take time and it is best to give written appointment to enable the PCO to undertake any urgent preliminary actions (such as tentative booking of a venue) without delay.