

## *How to Choose a Core PCO*

These guidelines have been produced to assist you with the appointment of a Core Professional Congress Organiser (PCO).

### **WHAT IS A CORE PCO?**

A PCO is a company, which specialises in the management of congresses. The company will act as a consultant to the organising committee or headquarter organisation, enacting its decisions and assisting to fulfil their objectives, whilst utilising the experience and knowledge it has gained over many years in organising events.

Many other companies offer PCO services including travel agents, public relations companies etc. Frequently the service offered by such companies is partial e.g. destination management. These differ from the PCO in that their primary business is not professional congress organisation.

There are many different ranges of services that a PCO can offer (for list of services, see Appendix A).

A Core PCO offers the same expertise and services as that of a PCO but, instead of providing these services for a one off event, provides these for either multiple events or on a multiple year tenure. As there is an extended relationship, this enables the Core PCO to offer extended services to those simply related to managing a specific event.

### **WHAT ARE THE BENEFITS OF APPOINTING A CORE PCO?**

Often the lead-time in planning a congress can be years rather than months and therefore the relationships, understanding and knowledge gained during that time between the PCO, the umbrella organisation and the local hosts becomes a valuable asset. Appointing a new PCO each time the event moves to a new location means this working relationship needs to be re-established when appointing a new PCO for the next event.

This is not always the most effective way of working as it takes time to tender, interview and appoint a PCO as well as additional time to transfer the knowledge about the umbrella organisation, the specific event and importantly the vision, goals and objective of what the event is helping to achieve.

Working with a Core PCO over a longer-term period and multiple events enables a long-term relationship to be established, creates continuity in terms of delivery and enables the Core PCO to really establish a partnership with the umbrella organisation. Efficiencies are gained by reducing the time taken to tender, interview and recruit for a PCO on an event by event basis plus significant time savings in not having to rebrief the agency each time on the scope and format of the event.

Organising events is very much about relationships; relationships and understanding between the PCO and the umbrella organisation, with local hosts, with key stakeholders and supporters. It is harder for this to be established when there is a frequent rotation of the event organiser.

As there is a longer term relationship, this also enables the PCO to provide additional added value. A continued working partnership enables the PCO to better understand the umbrella organisation's long term goals, and enables the Core PCO to advise on strategic goals, new ideas and align their expertise with the organisation's needs. The Core PCO can also assist by taking a strategic approach to future event selection feasibility and procurement.

## DO YOU NEED A CORE PCO?

To determine whether a Core PCO would benefit your organisation you need to have first determined that you need the services of a PCO in first instance.

Refer to IAPCO document: **How to Choose the Right PCO**

It is then worth considering:

- What resources does the umbrella organisation have available e.g. permanent headquarters' staff or changing volunteer board etc.?
- What are your long-term goals for the organisation?
- How is your event controlled e.g. by umbrella organisation or handed over to local hosts?

If your organisation is either governed by a volunteer group that changes regularly or passes the responsibility of the management of the organisation's event to a local host member, appointing a Core PCO should be something that should strongly be considered.

### Volunteer led Organisations

A volunteer led organisation may find that its board or committees have fewer resources available as they are taking on their organisation's business activities over and above their professional commitments. They may therefore be limited in time available or their professional expertise may be in other areas than that of event management. A Core PCO can provide dedicated resource, expertise and continuity to the organisation.

### Delegating Congress Management Responsibility

Your organisation may delegate the management or aspects of the organisation of your event to a local host member through a tendering process. If this is the case, having a Core PCO can help provide a level of continuity from one event to another when the organising committee changes. A Core PCO can also help to ensure that the knowledge of the event is transferred from one event to the next and that the event reflects and is representative of the objective of the umbrella organisation.

### Long Term Planning, Efficiency Savings and Strategic Input

If as an organisation you want to be able to plan longer term then having a Core PCO may also add benefits. Not only will you save time and resources in the tendering and contracting of a chosen PCO partner by carrying out this process less frequently, you will also be reducing the re-briefing and integration time of multiple suppliers.

Having a Core PCO who has been contracted for a specified timeframe also enables you collectively plan ahead. The PCO can be part of that process, adding value in conducting feasibility studies for new destinations, co-ordinating and negotiating supplier and venue procurement as well as also helping to develop the long-term strategic direction of your events.

Whatever the organisational structure of your organisation, appointing a Core PCO provides you with an additional resource that takes over the main logistical management of your event, enabling your organisation and its officers to focus on the content, key messaging and objectives and aims of your organisation.

Some PCOs will, as well as offering event logistics services, also offer strategic Association Management Services that you may find helpful.

By contracting a Core PCO you should be able to negotiate more favourable terms for a multi-year / event contract.

## WHEN TO APPOINT A CORE PCO?

Once you have determined that appointing a Core PCO is the appropriate step for your organisation, it should be recognised it is likely to change the method by which you operate as an organisation.

It may be that you are transferring this responsibility from existing headquarters staff or that it has been previously the responsibility of a local host to either manage the logistics themselves or to appoint a local PCO; both have differing implications. You therefore need to give consideration as to how this is introduced.

If it is transferring the responsibility from existing headquarters staff, then consideration needs to be given to what function these staff will now fulfil, if any?

If it is replacing the delegation of the logistical management of the event to a local host then this potentially impacts on the bidding guidelines and agreements you have with them. It is recommended that you time the appointment of a Core PCO to coincide with when you conduct the next bidding round for your future event. In that way you can amend the guidelines and be clear when setting the expectations with those bid hosts.

Should you want to appoint a Core PCO when you have already selected future destinations / hosts, then it is recommended that discussions are held with those parties to understand where there may be implications in changing the management structure and agree to a transition phase.

## PROCEDURE

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

- Determine what criteria are important to your organisation to understand what you will be benchmarking the tenders you receive. Some examples are:
  - Geographical location
  - Global / regional coverage
  - Service offerings
  - Ability to offer extended services
  - Previous expertise as a Core PCO
  - Cost and added value

- 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
- Presentation and interview
- Selection of PCO.

## 1. Production of a Tender Document

It is important to give PCOs as much information as possible when asking them to tender for a core PCO contract. General information on the event and the organisation and its history will help the PCO establish the type of service that is required. It is important that you also indicate the duration of the tenure and what your procedure is for future contract renewal.

It is recommended that you include information on the specific services you require for the actual event or congress so that the PCO can provide you with an accurate estimate of the fees they would charge.

It is recommended that you try and include as much of the following information as possible:

- No. of days of the congress / Is there a day pattern
- How frequently the event is held, annually etc.?
- General characteristics:
  - Time of year preferred (month, season, etc.)
  - Type of venue preferred (conference centre, hotel, academic etc.)
  - Geographical rotation
- No. of delegates split by category:
  - Member
  - Non Member
  - Student etc.
- Registration fee(s) at previous congress in the series if known, split by:
  - Type of registration
  - Any additional charges made e.g. workshops, dinners etc.
- Programme overview:
  - No. of parallel sessions
  - Plenary capacity
  - Any pre or post event workshops
  - Board meetings, AGMs etc.
- Accommodation requirements:
  - Approximate number of rooms
  - Type of accommodation e.g. mainly 3 /4 star hotels, university etc.
- Exhibition (if applicable):
  - Size of exhibition
  - Price per m<sup>2</sup>
  - Likely number of posters
- Sponsorship (if applicable):
  - Number of sponsors
  - Required sponsorship revenue
  - Split between International and local sponsors

- Social Programme:
  - Previous history of social programme (Gala Dinner, President's dinner, speakers' dinner, etc.
  - Optional tour programme required
  - Partner Programme required
  - Indication of what has been previously charged
- Abstracts:
  - No. of abstracts/papers to be received
  - No. of abstracts/papers to be accepted, either as posters or oral presentations
  - Do you have your own abstract management software?
  - Do you require PCO to manage the abstract submissions or will your organisation do this?
  - Are abstracts published as a journal supplement or are they a stand alone publication?
- Finance – any key factors that need to be considered
  - Who carries the financial responsibility for the congress; the international organisation or local hosts?
  - Is there a guaranteed profit that needs to be allowed for in the budget?
  - Are there any levies to be charged?

Look at the history of previous congresses in order to provide data (attendance, abstracts, industry etc) so that accurate estimates can be provided.

A copy of printed items from your previous congress provides extremely useful information, so include this or a reference to the website to access this if possible. The more detailed the information you supply, the more accurate and relative the information you should receive from those submitting tenders.

In addition to the specifics related to each event it would also be helpful to advise the PCO of:

- A brief history of your organisation
- Overall aims and objectives of your organisation
- An overview of your governance
- A summary of your relationship with your members e.g. is it with member associations or with individuals etc.
- Tenure of the contract
- The exact tasks you are looking for the Core PCO to undertake, if you are looking for them to take on a secretariat function for your association etc., then this should be detailed in the tender document.
- What will be the renewal or re-tendering process?

You may also want the Core PCO to provide additional services in addition to organising the individual events. These could include:

- Advice on future locations
- Carry out feasibility studies, inspection visits and make recommendations on future event destinations
- Co-ordinate the process for future destination selection
- Provide reporting data to the organisation's board and committees
- Make recommendations on trends, future formats and development of our event
- Offer extended Association Management Services such as membership, management, strategic consultancy etc. as part of the contract.

It is important to set the appropriate expectations, and therefore it is equally important that they are clearly defined in the tender document.

A Core PCO charges for its services. There are many ways in which they can charge depending upon cultural traditions and organisation structures. These fees cover the cost of the Core PCO in managing the congress for the specified tenure. 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 would normally be:

- General congress management (relating to services required - see Appendix A)
- Sponsorship
- Exhibition sales and management
- Scientific programme management
- Registration
- Social events
- Accommodation
- Consultancy services – feasibility studies, reporting, tender coordination
- Association Management Services.

You should ask that the fees are indicated for the duration of the contract but it is reasonable to expect these to be linked for inflation. You may also want to consider a performance based incentive structure.

To enable you to accurately compare the proposals you receive, you may want to include in your tender document a pricing model you wish the submitting companies to use.

Some companies may be willing to offer some services as added value or be willing to offer additional services for an extended contract period. It is therefore worth asking this in your tender document.

In addition it is prudent to ask each company to outline any other charges that may be made, such as mailings, telephone, fax, e-mail, general stationery, additional staff costs, travel, etc. Some companies also make additional service charges on other budget items or receive commission from suppliers and it is helpful to ask companies to outline their policy on these matters.

It should be noted, however, that to ask a PCO to prepare a budget for your congress as part of the tender process is not common practice. A PCO will need many details about your congress to be able to write an accurate budget and this will vary strongly from one location to another. Any budgets written without this essential detail can be extremely misleading and are frequently totally inaccurate.

*Refer to IAPCO document:*

***Request for Proposal (RfP) for the Appointment of a PCO***

Finally in the tender document it is helpful to outline what the tendering process will be:

A suggested approach is:

- Step 1 Submission of written proposal by potential Core PCOs
- Step 2 Shortlist is invited to be interviewed and present to you in person
- Step 3 You make ask specific PCOs to provide additional information
- Step 4 You may want to engage in more detailed discussions with more than one PCO before making final selection
- Step 5 Engage in contract negotiations with your preferred supplier
- Step 6 Once engagement is completed advise other shortlisted candidates of your selection.

It is helpful to indicate timelines for this process and where interviews will take place.

## 2. Obtaining of Preliminary Information on Accredited Core PCOs

For contact details on fully accredited PCOs who are members of IAPCO, please see the list at the back of this document or visit the website for full contact details: [www.iapco.org](http://www.iapco.org)

## 3. Creating a Shortlist of Suitable Core PCOs

In order to identify PCOs who may be suitable for fulfilling a multi year and / or a multi congress contracts. it is important to establish some broad criteria / guidelines such as:

- General experience with similar congresses and Core PCO contracts
- Image and reputation
- Affiliations to professional memberships/associations
- Regional experience / coverage
- Number of years in operation
- What technologies does the PCO provide or offer
- Where do they have offices
- Who owns intellectual property such as databases etc.

A specific list of questions can be found under section 7 “**Presentation and Interview**”

## 4. Distribution of the Tender Document

Once a shortlist of suitable PCOs has been made, the tender document can be distributed to them. It is normal practice to allow companies several weeks to produce the information that you require and to provide an estimate of fees especially when it is for a long-term contract, such as appointing a Core PCO. It is not good practice to ask a number of PCOs to carry out specific tasks, such as carrying out feasibility studies, prior to appointing a Core PCO. This can lead to malpractice.

## 5. Evaluation of Tender Documents

If fees have been quoted in a similar way then it is easy to establish the least from the most expensive services on offer. You will also have more detailed information on the type and level of service that each company can offer. However, when appointing a Core PCO there are many other factors that you will want to consider in your evaluation other than simply the price.

It may therefore be useful to create a scoring table using the criteria such as those listed in section 3 along with:

- price
- completeness and accuracy of information submitted
- relevance of information submitted
- creativity
- any value added offered.

Score these in a range of 1 – 5 to help you shortlist your candidates for interview.

## 6. Reference Checks on Prospective PCOs

At this stage of the process it is a good time to ask companies for written references or for contacts with whom you may take up references. References should be taken up with clients of both past and future congress, and it may be appropriate to contact a supplier such as a venue, hotel or convention bureau.

## 7. Presentation and Interview

It is normal practice to ask companies to make a short presentation on their services to the Board or Governance Group. In general terms, 30 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. 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. Does the company have experience in delivering similar long-term contracts?
4. Does the company have experience in working in the locations where you are likely to hold your congress?
5. Is the company financially sound and do they have a sensible amount of forward business to suggest they will continue to be so?
6. Is the company involved in any legal issues or financial disputes with past clients?



7. What is the company's primary 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.
8. 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.
9. Is the company's staff sufficiently experienced to be able to handle your event?
10. 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.
11. What procedures are in place should unforeseen circumstances affect key congress staff involved in the event immediately prior to the congress (sickness, accident etc).
12. 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?
13. Does the company sub-contract any of the services that they claim to offer?
14. Does the company offer any additional services that may be beneficial to you?
15. 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 or monitoring of quality?
16. Is the company quality assured?
17. What is the company's environmental / CSR policy?
18. What reporting / communication relationships will be established and how are these documented?

## **8. Selecting the core PCO**

The Core 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 key team who may be assigned to you to fulfil the contract.

Once you have selected the Core PCO you need to ensure that you have a clear written contract, which includes a specification of the work you require to be undertaken by the PCO. Most PCOs will have a standard agreement that they will send to you for consideration but it is wise to allow a legal representative to look at these to ensure that your interests are appropriately and properly protected.

## Appendix A

A Core PCO can take care of as much 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:

- Assistance with congress bids
- Venue research and feasibility
- Advise and consultancy services
- Help in defining objectives
- Guidance on congress taxation liabilities
- Preliminary outline plan
- Draft income and expenditure budget
- Finance consultancy – pre-finance, sponsorship, exhibitions, loans,
- Registration fees
- Book-keeping
- Control of bank accounts, income and expenditure ledgers
- Venue negotiation
- Organisational structure
- Meetings with organising committees
- Liaison with production companies
- Secretariat and office facilities, including mailing address
- Registration processing systems (both electronically and manually)
- Scientific or technical programme support
- Abstract handling (both electronically and manually)
- Exhibition sales and management
- Web design and management
- Poster sessions
- Speaker liaison
- Marketing and public relations
- Social media and communication
- Venue management
- Press office
- Staffing on site
- Social events
- Liaison with airlines
- Delegate transfers and on-site transportation
- Closure of congress accounts
- Post-event evaluation
- Design and print (congress image)
- Electronic information and design
- Gifts and congress accessories
- Insurance cover
- Food and beverage
- Décor and staging
- On-site services – electronic message systems, signs, security, wifi, lead retrieval
- Audio-visual equipment
- Technical services; interpretation, webcasting, website coordination
- Congress recording
- Translation of congress documentation
- Videoconferencing
- Accommodation bookings
- Tour programmes

If there are additional services over and above those related to each specific congress (as outlined in Section 1 **Production of a Tender Document**), then it is recommended that these are clearly listed.

### **List of Members**

A full list of members, including all contact details, is available on the IAPCO website

### **Reference Documents**

All IAPCO documents and guidelines can be obtained from IAPCO or from the IAPCO website to assist in the planning of your event.

### **Secretariat**

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