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Request for Proposal (RfP) for the appointment of a PCO for International and National Meetings

**This document is available as a word template from the IAPCO Secretariat
info@iapco.org for you to adapt to your own specification**

*It is recommended that this be read in conjunction with the IAPCO document
How to Choose the Right PCO*

When asking companies to tender for the organisation of a congress, it is important to give them as much information as possible. General information on the event and its history will help the PCO establish the type of service that is required. It is equally important to include information on the specific services you require so that the PCO can provide you with an accurate estimate of the fees they would charge.

Proposals submitted for the organisation of a major congress will be extremely detailed, often complex, and are set out in many different formats, making them difficult to compare and providing a burdensome task for the Organising Committee.

The following document provides you with a template and guidelines from which you can create your own RfP. Whilst it is not necessarily exhaustive, it will provide the essential elements required. It is hoped that this will assist the process and reduce the workload for the Organising Committee.

Proposal request recommendation

The RfP should be as detailed as possible and sufficient to enable the PCOs to provide the information requested [see following template suggestion]

It is recommended that the RfP be sent to maximum of five PCOs in order to ease the burden of the Organising Committee and to enable ease of comparison.

It is recommended that a lead time of a minimum of three weeks be allowed, in order that the necessary research and Proposal preparation can be provided in detail.

Where the PCO is not chosen to present, it would be extremely helpful to provide feedback to the PCO concerned in order that they may learn from the process.

Presentation of the Proposal recommendation

It is recommended that a maximum of three PCOs be shortlisted for a presentation.

It is helpful if information regarding the place/date/time and format of (time allowed for) the presentation be included within the initial RfP.

Before the final decision to appoint the PCO is made, it is felt to be best practice that a presentation be requested, either as face-to-face or, in the event of, and to avoid, extensive travel, as a webinar.

The PCO should receive the invitation to present at least two weeks prior to the presentation date, and be provided with information as to the basis on which the Proposal is to be judged.

It is recommended that sufficient time be allocated for each presentation: 60 minutes to include the presentation and the Q&A is deemed to be appropriate, with a 15 minute interval between interviews to avoid overlap and allow time for the Committee to evaluate.

Where the PCO is not chosen, it would be extremely helpful to provide feedback to the PCO concerned in order that they may learn from the process.

RfP guideline template

- *Text in italics refers to comments or clarifications*
- Regular text (non italics) is ready for use in the final document

Request for Proposal (RfP) for the Appointment of a Professional Congress Organiser

For the (**Name of Congress**)

To be held in (**City, Country**)

From (**Commencement date to finish date**)

Tender No. (**Insert No. eg 1 of 4**)

The (**Organising Entity**), host for the above Congress, is pleased to invite your organisation to tender for the appointment as Professional Congress Organiser (PCO) in respect of the above Congress. The following information is provided to assist you with the preparation of a proposal.

SECTION ONE

1. TIME FRAME FOR TENDER PROCESS

- Invitation to Tender forwarded to PCO Companies (Tenderers)
- Closing date/time for tender submission (*it is usual to allow a minimum of four weeks for preparation of tenders*)
- Interview of selected Tenderers
- Site visits
- Announcement of decision (subject to Contract negotiation)

date

date, hour

date

date(s)

date

2. SUBMISSION OF TENDER DEADLINE

(Please state clearly whether you are comfortable with electronic submissions or if you require hard copies)

Written submissions should be forwarded by the due date to:

(name)

Via email to: (email)

and/or

Hard copies (specify how many) sent to: (street address)

3. ENQUIRIES

Requests for further information or clarification of requirements may be directed to:

(name)

(street address/phone/email)

Please note that we reserve the right to advise, at our discretion, all parties issued with an RfP, of further information/clarification of tender requirements resulting from any enquiry.

4. PROFESSIONAL CONGRESS ORGANISERS INVITED TO TENDER

Consideration will be given to those applicants who have attained IAPCO membership which is the recognised international quality standard for PCOs.

[Insert the names of all PCO companies to whom you have issued the RfP]

(name)

(name)

(name)

(name)

5. CONGRESS NAME, DATE AND VENUE

The Congress is the **(name of congress)**, known as **(acronym)**.

The proposed dates are **(dates: from.....to)**

The venue:

(if applicable) is to be held at **(name of venue)**. A provisional booking has been made at the venue but contracts have not been negotiated or signed.

Or:

(if applicable) The venue has not yet been selected; proposals from the PCO are expected

6. BRIEF HISTORY OF THE CONGRESS

A copy of the Call for Papers/Invitation to Register and/or a Programme from the previous congress provides extremely useful information. In addition, include here as much background information as is available of which the minimum should be:

- No. of days of the congress
- How frequently the event is held
- No. of delegates (past 2 congresses)
- Registration fees at past 2 congresses in the series
- Size of exhibition (if applicable) sold space
- Price per m2 sold at previous congress
- Sponsorship range achieved at previous congress
- No. of abstracts/papers to be accepted as oral presentations

- No. of abstracts/papers to be accepted as poster presentations
- No. of invited speakers
- No. of parallel sessions
- No. of satellite sessions *(if applicable)*
- No. of social events
- No. of hotel rooms booked/sold

7. EXPECTED ATTENDANCE

The Congress expects to attract between **(number)** and **(number)** delegates, **(number)** accompanying persons and **(number)** exhibitors **(number of square metres)** and potential sponsorship in the region of **(number [currency])**. It should be appreciated that these figures are, at this stage, a best estimate based on past attendances/support at such Congresses. *(Any special attendance - such as students, developing countries, complimentary, invited guests, free exhibit space, etc. - should be noted).*

8. CONGRESS FORMAT

Although the format at this stage should be regarded as flexible, the following may be used as a guideline for initial planning purposes:

- No. of days of the congress
- No. of days of exhibition
- No. of build-up days
- Proposed social functions e.g. Welcome Reception, Opening Ceremony, Invited Speakers' Dinner, Congress Dinner (included in the registration fee or not), etc.
- Usual format of the programme to include:
 - Plenary sessions
 - No. of parallel sessions
 - Annual General Meeting
 - Workshops
 - Satellite Sessions
 - Sponsors
 - Other Associations' meetings/boards

The most convenient form may be to list the usual format on a day by day basis, e.g. Day 1, Day 2, etc. or provide a copy of the last Congress overview programme.

9. ACCOMPANYING PERSONS' PROGRAMME / PRE- & POST-CONGRESS TOURS

In the past, approximately **(number)** of accompanying persons have attended the congress. A selection of tours has been organised, provided on a self-financing basis at the risk of the appointed PCO, to run during the congress either as an inclusive package or to be sold as optional extras **(specify which)** for accompanying persons and/or delegates. Similarly, Pre- and Post- Congress Tours of a touristic nature for all participants are to be offered to be provided on a self-financing bases **(specify numbers)**. A similar arrangement is required for this Congress.

10. CONTRACTING ORGANISATION

The contracting organisation is:

(Legal name of Host Organisation)

(address).

(website)

(Please state if there is more than one organisation hosting the event).

11. ORGANISATION TO DATE

The **(name of convention bureau, LOC, and/or local authority, and/or or professional support, and/or venue)** has/have assisted us to date *[if applicable]*

Following is a brief outline of action taken to this point:

(a) Local Organising Committee

*Details should be provided of any steps that have already been taken in the formation of a Local Organising Committee, with details of any structure, names and specified responsibilities as is known. **(LOC structure)***

Details of any organisational steps that have been taken in the process to date should be clearly indicated.

(b) Venue

If a venue is currently being considered, please state.

The **(venue)** has been provisionally booked as follows:

(dates) including build-up and breakdown time

[detail the halls which have been booked if the entire Congress Centre is not held]

The PCO will be required to oversee venue negotiations and contract following appointment.

[It is preferable to defer the contracting of a venue until the advice of a PCO is contributed].

(If applicable) The venue has not yet been selected: the appointed PCO should make a selection and relevant proposals.

c) Hotel Accommodation

Accommodation is being provisionally held in key hotels within the City *[if applicable]*. The appointed PCO will be required to take over these bookings and manage a hotel booking service for all participants, including exhibitors. This service should be run at the risk of the appointed PCO, with the Congress not being liable for any deposits to be paid, or cancellation penalties. The appointed PCO will be required to negotiate favourable rates with the hotels.

SECTION TWO

The tender document provided by the PCO should follow the format and include written responses to sections A, B, and C

A. SERVICES TO BE PROVIDED

The PCO is invited to tender for the provision of the following services. The list is not necessarily exhaustive and Tenderers are welcome to incorporate additional services as they believe would be required for the successful organisation of this Congress.

The list is intended to be indicative of the responsibilities of the PCO as envisaged by the Organising Committee at this preliminary point in time. Tenderers should indicate their ability to provide the areas of service or indicate that it is not a role that they would undertake. Where the Tenderer would sub-contract any such role this must be clearly stated.

(Indicate the services required)

1) Project Management

- Congress Planning (meetings with the Congress Promoter/Organising Committee, planning of activities and updating of operations)

- Budgeting (management of the congress budget)
- Venue Management (venue selection and negotiation of the contract)
- Financial Management (management of contracts, bank accounts, account-keeping, tax management, invoicing and payments, cash-flow control)
- Management of Suppliers (selection and contracts)
- Administration (management of all matters relating to the congress)
- On-site Management

2) Scientific Programme Management

- Abstract Handling
- Speaker/Programme Management
- Meetings with the Scientific Committee

3) Marketing and Promotion

- Congress Marketing and Promotional Strategy
- Design of a Corporate Image
- Production of Promotional Congress Activities and Materials (website, announcements, programmes, badges, bags, gadgets, etc.)

4) Sponsorship and Exhibition

- Sponsorship Management (identification and development of sponsorship opportunities and guidelines, sales and marketing to potential sponsors and delivery)
- Exhibition management (selection of space, production of guidelines and floor plans, sales and allocation of spaces, stand services, contracts, invoicing, on-site management)

5) Delegate Registration

- Definition of Registration Fees
- Processing of Registrations (on-line, paper, on-site, collection/invoicing of fees, statistical reports)

6) Social Programme and Tours

- Proposal of Social Activities (opening and/or closing ceremony, welcome reception, gala dinner, invited speakers' dinner, etc.)
- Proposal of Programme for Accompanying Persons
- Proposal of Tours and Pre- and Post- Congress Tours

7) Hotel Accommodation

- Hotel Reservation (block bookings, negotiation of hotel rates and contracts, payments, management of modifications, reporting, etc)
- Management of Hotel Accommodation (allocation of rooms to individual participants and/or groups)

8) Transport Management

- Scheduling and management of Transport services (airport transfers, congress/hotel shuttle, VIP cars, public transport tickets)

9) On-Site Staff

- Selection, briefing and management of on-site staff (airport welcome desk, hotels, venue, accompanying persons' programme, tours, etc).

10) Congress Technology

- Implementation of Audiovisual Equipment, conference apps, use of social media, and on-site networking solutions

B. CONDITIONS OF APPOINTMENT OF A PCO

The successful Tenderer shall, as a minimum, be capable of providing professional congress managerial services for the Congress to international standards and best practice. Membership of IAPCO is considered verification of a company's capability to organise a congress to such a standard.

This section is the Tenderer's opportunity to provide further details of the company, including:

- 1) **Ability** – Tenderers are required to demonstrate their ability to provide the required services as detailed in the 'Services to be provided' above.
- 2) **Financial viability** - Tenderers are required to demonstrate their financial credibility.
- 3) **Proven track record** - Tenderers are required to demonstrate their experience as a PCO by providing information on meetings they have managed - especially meetings of a similar size and complexity.
- 4) **References** - Tenderers are required to submit at least three referees who will be contacted by representatives of the Organising Committee. Details required are name, contact information, meeting with which they were/are associated and position in relation to the organising of that meeting. Additional letters of reference may also be attached.
- 5) **Staffing** - Tenderers are required to give an overview of their infrastructure including staffing, experience and accreditation.
- 6) **Electronic Management** – Tenderers should demonstrate their IT capability, capacity and ability to provide electronic facilities in a secure environment.
- 7) **Financial Management** - Tenderers are required to demonstrate their competence in the area of financial management including qualification of personnel in this respect.
- 8) **Management System Certification** – Tenderers are required to specify all management system certifications they have: e.g. ISO 20121 (Event Sustainability), ISO 9001 (Quality), ISO 14001 (Environmental), etc.)
- 9) **Fees and Cost Structure** - Tenderers are required to clearly set down fees to be charged for services.

C. FEES

*(If you wish to have fees split out into different sections **insert how you wish to have the fees presented**, unless you wish to leave this up to the individual companies.)*

There are many ways in which a PCO can charge depending upon cultural traditions and organisation structures. These fees cover the cost of the PCO in managing the event. 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. Different services would normally be categorised as follows:

- General congress management (relating to specific services required)
- Financial management and account-keeping
- Congress corporate image: design and editing of print and promotional material
- Creation and management of the congress website

- Sponsorship sales and management
- Exhibition sales and management
- Scientific programme management
- Registration
- Social events
- Accommodation
- Tours

Tenderers are asked to outline any other charges that may be made, such as mailings, telephone, fax, e-mail, IT, general stationery, additional staff costs etc. Any additional service charges on other budget items should be clearly stated.

Tenderers are **not** asked to provide a budget to accompany their submission.

Preparing the budget is part of the work of the PCO once appointed and it is therefore not appropriate to ask a PCO to prepare a budget for your event as part of the tender process. A PCO will need many details about your event to be able to write an accurate budget which will need to be gained over a number of meetings as the two parties achieve a better understanding of the objectives, local influencing factors and the event content. Any budgets written without this essential detail can be misleading and are frequently totally inaccurate.

15. AWARDING OF CONTRACT

It should be noted that the Appointment of the PCO and the Awarding of this Contract will not be dependent only upon the fees quoted, but will be dependent upon the proven ability of the PCO to have understood the requirements of the Congress and their ability based on experience to deliver the event. Any appointment will be subject to successful contract negotiation.

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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