

Request for Proposal (RfP) for the appointment of a PCO for a National Meeting

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.

The following document provides you with a template from which you can create your own RfP. Whilst it is not necessarily exhaustive, it will provide the essential elements required.

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

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

For the **(Name of Congress)**
To be held in **(City)**
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 for the Local Organising Committee (LOC) to consider.

SECTION ONE

1. TIME FRAME FOR TENDER PROCESS

- Invitation to Tender forwarded to PCO Companies (Tenderers) date
- Closing date/time for tender submission *(it is usual to allow a minimum of three weeks for preparation of tenders)* 5pm on date
- Interview of selected Tenderers *(it is usual to allow at least one week notice for the interview date)* date
- Visit to PCO Office *(if required)* date(s)
- Announcement of decision (subject to Contract negotiation) 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/phone/)

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)

5. CONGRESS NAME, DATE AND LOCATION

The Congress is the (name of congress), known as (acronym) and will be held in (city).

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 congress)
- Regional breakdown of association members / past delegates if known
- Registration fees at past 2 congresses in the series if known
- Size of exhibition (if applicable) sold space
- Price per m2 sold at previous congress
- Sponsorship range achieved at previous congress (eg €30k, €50k etc)
- No. of abstracts/papers to be accepted as oral presentations
- No. of abstracts/papers to be accepted as poster presentations
- No. of parallel sessions
- No. of social events

7. 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:

- Number of days of Congress
- Number of days of exhibition
- Proposed social functions
- Usual format of the programme to include:
 - Plenary sessions
 - No. of concurrent sessions
 - Annual General Meeting
 - Workshops
 - Satellite Sessions
 - Sponsors
 - Other associated Associations

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.

8. EXPECTED ATTENDANCE

The Congress expects to attract between **(number)** and **(number)** delegates, **(number)** accompanying persons and **(number)** exhibitors. It should be appreciated that these figures are, at this stage, a best estimate based on past attendances at such Congresses. *Any anomalies such as students, complimentary, invited guests should be noted.*

9. ACCOMPANYING PERSONS' PROGRAMME / PRE- AND 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. A similar arrangement is required for this Congress.

10. CONTRACTING ORGANISATION

The contracting organisation is **(Legal name of Host Organisation)** of **(address)** and our website address is **XXX**. *Please state if there is more than one organisation hosting the event.*

11. ORGANISATION TO DATE

The **(name of convention bureau/name of congress venue)** has 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 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].*

12. SELECTION CRITERIA

If it has been determined, please outline what your selection criteria, for the successful PCO, will be.

SECTION TWO

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

A. 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 their company including:

- Financial viability
- Proven track record
- References
- Staffing Infrastructure
- Capacity and ability to provide electronic facilities in a secure environment.

B. 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.

(Indicate the services required)

1) Project Management

- Budgeting (management of the congress budget)
- Financial Management (management of congress bank accounts)
- Administration (management of all matters relating to the congress)

2) Programme Management

- Abstract Handling
- Speaker Management

3) Marketing and Promotion

- Congress Marketing and Promotional Strategy
- Production of promotional materials

4) Sponsorship and Exhibition

- Sponsorship (development of opportunities, sales and delivery)
- Exhibition (sales and exhibitor logistics)

5) Logistics

- Processing of Delegate Registrations
- Venue Management
- Accommodation Management
- Onsite Management
- Onsite materials and print
- Social Programme
- Tours
- Transport

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. 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)*
- *Sponsorship sales and management*
- *Exhibition sales and management*
- *Scientific programme management*
- *Registration*

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.

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.

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