



How to Choose the Right PCO

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

WHAT IS A PCO?

A PCO is a company, which specialises in the management of congresses. The company will act as a consultant to the organising committee, enacting its decisions 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, suppliers of technology, etc. Frequently the service offered by such companies is partial e.g. destination management. The PCO provides a much more complete service offering that includes consideration of your organisation's overall objectives and strategy.

FORMAT OF CONGRESS

Congresses can take many shapes, forms and sizes. As technology has advanced, so too has the format by which congresses are delivered today.

The most prevalent congress is a physical congress that takes place in a city with delegates in attendance.

A hybrid congress combines a live, physical event with online components to engage both physical and virtual attendees.

A virtual congress is a real-time event that take place online using audio and video, and is a usually fully interactive version of a physical congress.

There are many different ranges of services that a PCO can offer – be sure that you identify clearly those services you require. Refer to IAPCO website for List of Services. <https://www.iapco.org/app/uploads/2018/04/Standard-list-of-services-2018.pdf>

DO YOU NEED A PCO?

If there are areas of congress management for which you cannot provide the knowledge, the resources, the time or the technical facilities, then a PCO will handle these for you. A PCO will also act as a link between different committees and suppliers. The committee or association will normally retain control of the event and set the policy with the PCO acting as the project manager and ensuring that the administration runs smoothly. In addition, they will provide advice on all aspects of congress management and work with you in partnership to ensure the success of your congress.

In order to best determine the services you will require from your PCO, it is recommended to verify with the international body of your association which, if any, services the association already offers.

WHEN DO YOU NEED A PCO?

A PCO can be brought in at different stages during the planning process. It is recommended to appoint a PCO 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 timeline for the planning and organisation of your congress. They can also offer help in the preparation and presentation of bids to win a congress for a particular destination; this may be in partnership with the local convention bureau if appropriate.

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:

1. Production of a tender document
2. Obtaining of preliminary information on accredited PCOs
3. Creating a shortlist of suitable PCOs
4. Distribution of the tender document
5. Evaluation of tender documents
6. Reference checks on prospective PCOs
7. Presentation and interview
8. 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 congress. 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. Based on expectations, the minimal information to be included is:

- No. of days of the congress
- How frequently the event is held
- No. of delegates
- Format for congress (live/physical, hybrid, virtual)
- Registration fee at previous congress in the series if known
- Accommodation requirements
- Size of exhibition (if applicable)
- Price per m²
- No. of abstracts/papers to be received
- No. of abstracts/papers to be accepted, either as posters or oral presentations
- No. of parallel sessions
- No. of social events

- Description of pre- and post-congress events, if any
- If some services are delivered by your own headquarters, a description of those task should be included

For accurate estimates please base yourself on data from previous congresses and adapt this where necessary. Also links/access to Call for Papers/Invitation to Register and/or a programme from the previous congress provides extremely useful information. The more precise and complete your information, the better the potential PCO can quote its services.

A PCO charges for its services. It can charge in many ways depending upon cultural traditions and organisation structures. The 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.

For complex proposals you might want to think of a calculation scheme in which the PCOs should submit their fees, thereby avoiding investing a lot of time in trying to compare offers that are all based on different ways of calculation.

The services would normally be:

- General congress management
- Sponsorship
- Exhibition sales and management
- Scientific programme management
- Registration
- Social events
- Accommodation
- Financial Management (VAT exemption, best suitable contract solutions)
- Congress Marketing / Social Media Management / Digitisation
- Hybrid/Virtual elements

In addition it is prudent to ask each company to outline any other charges that may be made, such as mailings, telephone, e-mail, general stationery, additional staff costs 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 it is not common practice 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. Any budgets written without these essential details can be extremely misleading and are frequently totally inaccurate.

Financial Security & Transparency

When selecting a PCO transparency and financial security are important information that should be requested from the potential PCOs.

In order to assure a co-operation of mutual trust, the PCOs should agree to disclose all contracts with suppliers, commissions and other benefits.

Tenderers should be required to demonstrate their financial credibility and stable financial position. They should be asked to hand in the balance sheets and profit and loss accounts for the past three years to provide evidence of this.

Refer to IAPCO white paper: **Request for Proposal (RfP) for the Appointment of a PCO**
<https://www.iapco.org/knowledge-hub/>

2. Obtaining of Preliminary Information on Accredited PCOs

For contact details on fully accredited PCOs who are members of IAPCO, refer to the website for full contact details: <https://www.iapco.org/iapco-members/>

3. 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:

- What is the company's core business? Many travel agents, tour companies, public relations consultants, technology suppliers, etc. offer congress organising services. A PCO, however, has no conflicting interest. The main activity of the company is congress organisation resulting in greater experience and in-depth knowledge on congress specific matters (e.g. compliance issues for medical congresses)
- General experience with similar congresses (size, type, format)
- Image and reputation
- Financial Security and Transparency
- Affiliations to professional memberships/associations
- Regional experience / coverage
- Number of years in operation
- Know-how in compliance issues

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.

If you include a timeline in your tender document stating the detailed time frame of the tender process you will avoid many questions that you need to answer.

It is not good practice to ask a number of PCOs to make reservations prior to the appointment of a 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. If you have given the tenderers a quotation scheme comparison this will now be a lot easier for you.

Make sure that you really understand which services are included in the quoted fees. If this is not completely clear to you do not hesitate to ask the PCO and ask them to specify the concrete tasks that are covered by the services.

If one company is far cheaper than all the others that might be a sign to ask yourself if they deliver the quality standard that you require for your congress.

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 events, and it may be appropriate to contact a supplier such as a venue or hotel.

7. Presentation and Interview

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.

It is acceptable to conduct the presentation/interviews virtually, avoiding unnecessary travel and cost, as long as the same conditions are applied to all the PCO candidates.

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:

- Does the company have a proven track record in organising your type of event e.g. corporate, association or government?
- Does the company have a proven track record in organising events of a similar size, format and in similar venues?
- Is the company financially sound and do they have a sensible amount of forward business to suggest they will continue to be so?
- Is the company involved in any legal issues or financial disputes with past clients?
- 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. Virtual elements are an integral part of most international congresses.
- Is the company's staff sufficiently experienced to be able to handle your event?
- 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.
- What procedures are in place for risk management?
- What procedures are in place should unforeseen circumstances affect key congress staff involved in the event immediately prior to the congress (sickness, accident etc).
- 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?

- If industry income from pharmaceutical and medtech companies is important to your event – is the company an expert in compliance handling and up-to-date in all existing codes of conduct?
- Does the company sub-contract any of the services that they claim to offer?
- 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.
- Is the company quality assured?
- What is the company’s environmental policy? Is this in line with the policy of your event?
- What reporting relationships will be established and how are these documented?

8. Selecting the PCO

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 the 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.

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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