

HOW TO CHOOSE THE RIGHT PCO

IAPCO ASSOCIATION
SUPPORT SERIES

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ASSOCIATION
SUPPORT SERIES

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1. INTRODUCTION

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 and events. The company will act as a consultant to the Local Organising Committee (LOC) and Host Organisation/Society, enacting the LOC's decisions while using the experience and knowledge it has gained over many years in organising congresses.

Many other types of companies offer PCO services including travel agents, public relations companies, suppliers of technology, etc. Frequently however, the service offered by such companies is only partial (e.g., destination management). The PCO provides a much more comprehensive service offering that includes consideration of your organisation's overall objectives and strategy.

For more information on conference terminology, refer to IAPCO document: "Bidding for a Congress"

FORMAT OF CONGRESS

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

The most common type of congress is an in-person congress that takes place in a city convention centre, with delegates in attendance.

A hybrid congress combines a live, in-person congress with online components to engage both in-person and virtual audiences. The virtual component is presented and managed via an online platform.

A fully virtual congress is a real-time event that takes place only online using audio and video and is often a fully interactive version of an in-person congress, including, for example, a virtual exhibition and virtual social events. It is presented and managed via an online platform.

There is a wide range of services that a PCO can offer – be sure that you clearly identify those services you require. Refer to the IAPCO website for detail on the standard services provided by PCOs:

- [List of Standard PCO Services \(In-person/Hybrid\)](#)
- [List of Standard PCO Services \(Virtual\)](#)

DO YOU NEED A PCO?

If there are areas of congress management for which you do not have 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 various committees and suppliers. The LOC/Host Organisation will normally retain control of the congress and set the policy, with the PCO acting as the project manager and ensuring that all administration runs smoothly. In addition, the PCO will provide advice on all aspects of congress management and work with you in partnership to ensure the success of your congress. The PCO's role is to guide you throughout the organisational journey of your congress and to act as your consultant and trusted partner. A PCO can be instrumental in connecting all the dots and delivering all the services required for the delivery of a congress in a professional way.

In order to best determine the services you will require from your PCO, it is recommended that you verify with your association, or the International Organisation that "owns" the congress, 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 ideal 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, developing a planning timeline, shortlisting suppliers, promoting the congress, managing registration and bookings, and scientific programme management. Even prior to a congress destination being chosen, a PCO can offer help in the preparation and presentation of bids to win a congress for a particular destination (possibly in partnership with the local Convention Bureau (CVB), if appropriate).

In addition, the PCO is experienced in delivering or transforming your organisation's congress into any format required, according to the season and circumstances.

2. 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/Request for Proposal (RfP)

Refer to IAPCO document: “**Request for Proposal (RfP) for the Appointment of a 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 congress 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:

- Number of days of the congress
- How frequently the congress is held – congress history and data
- Number of delegates
- Format for congress (in-person, hybrid, virtual)
- Preferred venue requirements
- Registration fee/numbers in different categories at previous congress in the series, if known
- Accommodation requirements
- Size of exhibition (if applicable)
- Price per m²
- Number of abstracts/papers to be received
- Number of abstracts/papers to be accepted, either as posters or oral presentations

- Scientific programme overview – number of parallel sessions
- AV and technology requirements
- Number of invited speakers, information on the hospitality needs for speakers
- Number of social events, lunches, dinners, technical tours
- Data of income and statistics from previous congresses
- Description of pre- and post-congress events, if any
- Pre-requisites and obligations towards national/international body
- If some services are delivered by your own headquarters, a description of those tasks should be included

For accurate estimates, please analyse 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 for its services.

There are many ways in which a PCO can charge depending upon cultural traditions and organisational structures. These fees cover the cost of the PCO in managing the congress. 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 bookkeeping (including, e.g., VAT exemption, best suitable contract solutions)
- Congress corporate identity: design and editing of print and promotional material
- Creation and management of the congress website
- Sponsorship sales and management
- Exhibition sales and management
- Logistics and supplier management
- Abstract management
- Scientific programme management and speaker management

STEP 2

- Registration management
- Audio-visual and technology
- Virtual and hybrid technology, if applicable
- Congress promotion and marketing
- Media management
- Staffing and administration
- Catering
- Social events
- Accommodation
- Tours

For complex proposals, you might want to provide a format in which all of the PCOs should submit their fees, thereby avoiding investing a lot of time in comparing quotes that are all based on different ways of calculation.

In addition, it is prudent to ask each company to outline any other charges that may be made, such as mailings, telephone, email, 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 tenderers to outline their policy on these matters. In order to establish a relationship of mutual trust, the appointed PCO 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 (for example by three-year audit by major audit firm/or bank guarantee).

Please note that it is advised not to ask tenderers to provide a congress budget to accompany their submission.

Preparing the congress 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 congress as part of the tender process. A PCO will need many details about your congress to be able to develop an accurate budget and this information can only be gained over a number of meetings as the two parties achieve a better understanding of the objectives, local influencing factors, and the congress content. Any budgets written without this essential detail can be misleading and are frequently totally inaccurate.

2. Obtaining of Preliminary Information on Accredited PCOs

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

3. Creating a List of Suitable PCOs

In order to identify PCOs that may be suitable for the management of your congress, 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
- Team structure and organisation chart

A specific list of questions can be found under section 7 - Presentation and Interview

4. Distribution of the Tender Document

Once a list 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 tenderers to make venue or hotel bookings prior to appointment



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 format to use, the comparison will be much easier.

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 to specify the concrete tasks that are covered by the services.

If one company is far cheaper than all the others, they may not have quoted for all of the required services, or it might be a sign to question whether they can 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 for written references and for current and past clients that you can contact for a reference. It may also 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 Organisation. 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 congress or event (e.g., corporate, association, or government)?
- Does the company have a proven track record in organising congresses of a similar size and 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 technologically advanced to handle the requirements of your congress? Do they have expertise in producing fully virtual or hybrid congresses? Data security with regard to electronic communication and submission of abstracts/papers and registration is also essential. Specifications of their audio-visual and IT proficiency and potential should be provided.
- Is the company's staff sufficiently experienced to be able to handle your congress?
- Who is responsible for the finances of the congress and who controls the accounting? It is important to ensure that, unless there is an agreed financial arrangement, any congress income remains in your control 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 immediately prior to the congress (sickness, accident, etc.)?
- If industry/sponsorship 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/sponsorship income from pharmaceutical and MedTech companies is important to your congress, is the company an expert in managing compliance issues 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? This should be an added value in your selection process. Many associations allow membership in exchange for a subscription and do not uphold any form of professional standards.
- Is the company quality assured? Does it comply with Europe's General Data Protection Regulation (GDPR) and other national data privacy restrictions and obligations?
- What is the company's environmental and corporate social responsibility (CSR) policy? Is this in line with the policy of your congress? What is the company's position on diversity?
- Is the company able to deliver a sustainable congress?
- What reporting relationships will be established and how are these documented?

8. Selecting the PCO

The PCO you select will be the one which 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.

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About IAPCO

The International Association of Professional Congress Organisers - IAPCO, is a global non-for-profit organisation representing today 138 accredited business and professional events organisation companies in 40 countries. All Members have undergone a qualification process to become a Member of IAPCO and must continually demonstrate a high level of service through the IAPCO annual quality assessment audits. The IAPCO mission is to raise the standards of service amongst its members and other sectors of the meetings industry by means of continuing education, interaction with other professionals and research.

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.

HQ/Secretariat

THE INTERNATIONAL ASSOCIATION OF PROFESSIONAL CONGRESS ORGANISERS ("IAPCO") is registered at c/o Prager Dreifuss, Mühlebachstrasse 6, 8008 Zürich, Switzerland, registration no. CH-020.6.900.220-3/. Administration and secretariat services are provided by outsourced contractors based in Belgium and the United Kingdom. Contact details: info@iapco.org

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