

## How to Choose the Right PCO

These guidelines have been produced to assist you with the appointment of a Professional Congress Organizer (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 organizing committee, enacting its decisions whilst utilising the experience and knowledge it has gained over many years in organizing 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 core business is not professional congress organization.

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

### 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 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. (For information on the relationship between an international association, the local organizing committee and the PCO, IAPCO document *Guidelines for co-operation between the International Association, the Local Organizing Committee and the Professional Congress Organizer*).

### WHEN DO YOU NEED A PCO?

A PCO can be brought in at different stages during the planning process. It is recommended that a PCO be appointed 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 time line for the planning and organization 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
- Registration fee at previous congress in the series if known
- Accommodation requirements
- Size of exhibition (if applicable)
- Price per m<sup>2</sup>
- 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

For accurate estimates please base yourself on data from previous congresses and adapt this where necessary.

A copy of a Call for Papers/Invitation to Register and/or a programme from the previous congress provides extremely useful information.

A PCO charges for its services. There are many ways in which it can charge depending upon cultural traditions and organization 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. These would normally be:

- General congress management (relating to specific services required - see Appendix A)
- Sponsorship
- Exhibition sales and management
- Scientific programme management
- Registration
- Social events
- Accommodation

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 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 event as part of the tender process is not common practice. A PCO will need many details about your event to be able to write an accurate budget. Any budgets written without this essential detail can be extremely misleading and are frequently totally inaccurate.

## **2. *OBTAINING OF PRELIMINARY INFORMATION ON ACCREDITED PCOs***

For contact details on fully accredited PCOs who are members of IAPCO, please visit 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 PCOS***

In order to identify PCO's that may be suitable for the management of your event it is important to establish some broad criteria/guidelines such as:

- General experience with similar congresses (size, type)
- Image & reputation
- Affiliations to professional memberships/associations
- Regional experience / coverage
- Number of years in operation

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. It is not good practice to ask a number of PCOs to make reservations prior to 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.

## **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 Organizing 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. 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 organizing your type of event e.g. corporate, association or government?
2. Does the company have a proven track record in organizing events of a similar size and in similar venues?
3. Is the company financially sound and do they have a sensible amount of forward business to suggest they will continue to be so?
4. Is the company involved in any legal issues or financial disputes with past clients?
5. What is the company's core business? Many travel agents, tour companies, public relations consultants etc offer congress organizing services. A PCO, however, has no conflicting interests, the main activity of the company being that of congress organization resulting in greater experience and skills in this area.
6. 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 organization.
7. Is the company's staff sufficiently experienced to be able to handle your event?
8. 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.
9. What procedures are in place should unforeseen circumstances affect key congress staff involved in the event immediately prior to the congress (sickness, accident etc).
10. 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?
11. Does the company sub-contract any of the services that they claim to offer?
12. 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.
13. Is the company quality assured?
14. What is the company's environmental policy?
15. 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.

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## Appendix A

### Services

A 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
- Organizational structure
- Meetings with organizing 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
- 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
- Audio-visual equipment
- Simultaneous interpretation
- Congress recording
- Translation of congress documentation
- Videoconferencing
- Accommodation bookings
- Tour programmes

**Feedback:** IAPCO recognises that the above list is not exhaustive and may not cover every element of the work of the PCO. IAPCO would therefore welcome comments and suggestions for future inclusion in any new editions. Thank you. [info@iapco.org](mailto:info@iapco.org)

*The International Association of Professional Congress Organizers (IAPCO), a non-profit organization founded in 1968, represents the world's leading professional organizers and managers of international and national congresses, conventions and special events. IAPCO is committed to raising standards of service among its members and other sectors of the meetings industry by means of continuing education and interaction with other professionals. IAPCO monitors the activities of its members on an annual basis. As a result, IAPCO membership offers a unique quality assurance recognised by conference clients and suppliers in every continent.*

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