

Guidelines for Co-operation between the International Association, the National Organising Committee and the Professional Congress Organiser

The objective of these skeleton guidelines is to provide international associations with a document which, when adapted to their own needs, will:

- Assist national organisations in making the decision whether to invite the related International Association to hold a congress in their country
- Establish a checklist of the organisational tasks connected with the preparation and realisation of an international association congress
- Help to ensure effective communication and understanding between the International Association and the responsible National Organising Committee
- Ensure continuity of traditions and ambience of the congress
- Indicate some of the benefits to be gained from taking the advice of a Professional Congress Organiser (PCO).

Refer to IAPCO document:: ***Bidding for a Congress***

INTRODUCTION

The organisation of large congresses at regular intervals in different countries is an essential feature of the work of many, if not most, international professional and scientific associations. The arrangements are complex and lengthy, especially as over the years the regular congresses usually assume a pattern of events which the participants expect and which has proved to be in the best interest of members. Detailed knowledge of this pattern is held in the central secretariat of the association but it is not known, except in general terms, to the host committee in the country where the congress is to be held.

In these circumstances a number of leading international associations have issued guidelines for the use of national committees. These guidelines are intended to cover, not only the organisation of the congress in general, but also the respective responsibilities of the international secretariat and the national committee with regard to such matters as finance, professional content, printing, pre-congress meetings, treatment of VIPs, etc. They also define matters on which consultation and co-operation between the central secretariat and the national committee is essential.

In the view of IAPCO, such guidelines are a valuable contribution towards the efficient organisation of international congresses and associations which have not issued them should be encouraged to do so. IAPCO has therefore prepared these skeleton guidelines which can be adapted without difficulty to the purposes of individual associations.

IAPCO has noted that many of the matters on which central secretariats give detailed advice to host committees are matters on which Professional Congress Organisers (PCOs) are experienced and expert. Such committees, by deciding to use the services of a PCO, will find themselves able both to meet the guidelines presented to them from the secretariat and also to give to the congress the special national flavour which they obviously seek. IAPCO strongly believes that the professional advice available from PCOs is a near-essential element in the organisation of a successful international congress. In addition, over the last few years there has been a centralisation of the PCO function with the result that many of the functions of co-ordination between the International Association and the National Organising Committee are increasingly co-ordinated by a Core-PCO company.

A GENERAL INFORMATION ABOUT THE INTERNATIONAL ASSOCIATION

- Secretary General - name, address, telephone, fax, e-mail and website
- Short history of the Association
- Objectives of the Association
- Structure of the Association

B GENERAL INFORMATION ABOUT THE CONGRESS

- History - place, date and attendance of previous six congresses
- List of future destinations and dates
- Objectives of the Congress
- Official languages
 - for translation of print items
 - for simultaneous interpretation
 - for translation of papers
- Submission of invitation - detailed procedure required or recommended including timing, format and extent of invitation
- Financial responsibilities of the International Association and the National Organising Committee (see Section D)
- Eligibility of attendance - open or closed meeting
- Precedent for holding a trade or technical exhibition, or book displays
- Other space requirements: future host countries, national associations, hospitality etc.

Division of Responsibilities between the International Association and the NOC

The clear definition of the respective responsibilities of the international secretariat and the National Organising Committee (NOC) is essential and, once defined, it is essential that each party accept its responsibilities. The division will, of course, vary from association to association and from congress to congress. The lists which follow give those areas which are usually reserved for the International Association (Section C) and those which are the concern of the National Organising Committee (Section D). It must be emphasised that the second list is necessarily incomplete as, once the responsibilities of the international secretariat are established, all remaining areas fall to the national committee

In broad terms the role of the International Association has usually been to co-ordinate policy whilst that of the National Organising Committee was the logistical delivery of the congress. The general tendency over the last few years has been for the International Association to assume an increasingly strict organisational overview of the congress often by mandating a Core-PCO to organise the congress and regulate the interaction and responsibilities of the National Organising Committee as well as assume many of the day-to-day responsibilities of the International Association.

Regular meetings should be held between the responsible bodies to review arrangements.

C INTERNATIONAL ASSOCIATION RESPONSIBILITIES

- C1 Time-planning and meetings schedule
- C2 Decisions or advice on programme policy and professional content
- C3 Financial policy and approval of budget
- C4 Trade or technical exhibition policy
- C5 Publications and mailings policy
- C6 Publicity policy

C1 Time-planning and meetings schedule

The International Association should establish the timetable and meetings schedule and advise the National Organising Committee on the following:

- Purpose of the congress
- Objective and theme of programme
- Duration of the meeting and the exhibition
- Preferred month (taking into consideration: climate, religious holidays, university terms, cheap tariffs etc).
- Pre-congress committee timetable and requirements
- Registration deadlines
- Opening and closing ceremony requirements
- Session timetable taking into consideration: plenary, concurrent, workshops etc and audio-visual requirements and expected levels of attendance
- Allied or satellite meetings
- Working groups and committees before, during and after congress
- Technical visits or tours
- Languages: the extent of simultaneous interpretation and the extent of translation required

C2 Decisions or advice on programme policy and professional content

The following responsibilities should be agreed and allocated to either the International Association or the National Organising Committee

- By whom are the speakers invited and by what criteria?
- Who invites the chairmen and moderators to participate?
- Are honoraria paid to speakers and/or chairmen and, if so, how much?
- Are expenses for hotel and travel reimbursed to speakers and/or chairmen and to what extent
- Do speakers and/or chairmen pay registration fees?
- Who corresponds and communicates with speakers and chairmen?
- Who issues speakers' guidelines and charts for audio-visual needs?
- What adjudication procedures apply after the "Call for Papers"?
- Who is responsible for briefing speakers, chairmen and interpreters at the congress?
- Who is responsible for the administration of papers: abstracts, pre-prints, manuscripts and proceedings?
- Who is responsible for the publication of papers: abstracts, pre-prints, manuscripts and proceedings?
- What are the regulations concerning online availability of papers: abstracts, pre-prints, manuscripts and proceedings?

*Refer to IAPCO document: **Guidelines for the International Scientific Programme Committee and Poster Presentations for an International/National Congress***

C3 Financial policy and approval of budget

Clear guidelines are essential. Questions of financial policy are best agreed at the earliest possible date. The International Association should advise the National Organising Committee on the following policy matters

- Who is responsible for compiling and approving the budget?
- Who is responsible for approving budget inclusions/exclusions/changes?
- Who approves the accounts?
- Who is responsible for a financial deficit or who benefits from a surplus?
- Is there a per capita or other levy to the International Association and when is it due?
- Do registration fees have to be approved by the International Association, and in what currency are they to be levied?
- Extent of insurance required and whose responsibility?
- Is funding available for early cash flow needs?
- Signatories of congress contracts (PCO, venue, caterers, hotels, interpreters)
- Signatories on cheques
- Regularity of budget up-dating
- Auditing requirements
- Who is entitled to free registration?
- Are there any special category guests whose expenses need to be included in the budget?
- Is the spouse fee set at "breakeven" or increased to support congress funds, or is it subsidised?
- Who is responsible for the cost of visits to the host country by representatives of the International Association?
- Is commercial sponsorship acceptable and if so who takes overall responsibility for it?
- Who is financially responsible for technical tours?
- Is an Appeals Fund to be launched and, if so, is it to be national and/or international?
- Is there an established list of people to be approached?
- Who takes overall responsibility for the Appeals Fund?

C4 Trade or technical exhibition policy

- Is a trade or technical exhibition to be organised?
- Should it be a source of income to the congress?
- If so, should it be the responsibility of the National Organising Committee or delegated to a Professional Exhibition Organiser (who may well be the appointed PCO)?
- If the latter, should this be for a fee with the risk undertaken by the congress, or should the financial risk be taken by the professional?
- Who arranges for a customs clearance office

C5 Publication and mailings policy

The International Association should advise on any established procedure and overall responsibility should be determined.

- Timetable of deadlines for printed material should be established and agreed
- Mailing lists to be used for each publication should be agreed, eg via national associations or individual mailings
- Possible method of distribution to be agreed
- Any specific precedent which needs to be followed in distribution, content, or design

- Checklist of publications to be agreed
 - First Announcement
 - Preliminary Announcement
 - Registration papers with Final Announcement and Abstract Form
 - Second Registration papers mailing?
 - Final Programme
 - Book of Abstracts or CD-Rom of Abstracts
 - Book or CD-Rom of Proceedings
 - Participant List
- Will congress Internet homepages be located with the International Association or created by the National Organising Committee?

C6 Publicity policy

- Overall responsibility should be determined
- Editorial policy - trade press, national press
- Advertising policy - space in congress publications?

D NATIONAL ORGANISING COMMITTEE RESPONSIBILITIES

Liaison with the International Association secretariat

- Checking of precedent and procedures
- Distribution of National Organising Committee minutes of meetings to the International Association
- Language checking of print items
- Confirmation of responsibilities of the International Association and receipt of all appropriate information and guidelines (Section C)

Appointment of PCO

The appointment of a PCO or the existence of a Core-PCO will determine which of the following services will be undertaken by the PCO rather than the NOC.

*Refer to IAPCO Guidelines: **How to Choose the Right PCO** and **Request for Proposals (RfPs) for the appointment of a PCO***

Responsibilities

The following checklists reflect normal procedures and need to be reviewed by each organising committee

- D1 Financial control, budget and keeping of accounts
- D2 The venue - meeting halls, equipment, contracts, logistics and use of space
- D3 Processing, production and distribution of documentation both pre- and during congress
- D4 Staffing on site, supervisors, technicians, registration and information staff, interpreters and translators
- D5 Technical tours programme
- D6 Language services management - translation and translators
- D7 Promotion and publicity, setting up of a website for promotion, programme and receiving registrations and abstracts
- D8 Registration of delegates
- D9 Social programme events and tours
- D10 Hotel (and university/college) accommodation schemes

- D11 Organisation of technical exhibition, book displays and raising of sponsorship
- D12 Press
- D13 Security

*Refer to IAPCO document: **First Steps for the Chairman of an International Meeting***

D1 Financial control, budget and keeping of accounts

- Writing the budget
- Opening bank accounts
- Local or government tax law commitments
- VAT (or similar tax) implications
- Keeping books of account
- Monitoring cash flow and funding accounts
- Checking bank statements, invoices and paying accounts
- Monitoring expenditure within the approved budget
- Control of financial contributions fund, and sponsorship funds
- Receiving registration fees and other income
- Monitoring non-payments
- Advice on insurance needs (Public Liability and Abandonment)
- Advice on transfer of funds (country to country)
- Investment of surplus funds for revenue
- Production of final accounts

D2 The venue

- Recommendations of appropriate venue(s)
- Venue contract, negotiation and agreement
- Allocation of space
 - professional programme (spoken and poster)
 - social events
 - desks for registration, enquiries, travel, speakers, social events, recordings, proceedings, tours, bank, theatre, congress “shop”, post office
 - sitting out areas
 - catering needs
 - secretariats - international, national, scientific
 - press
 - speakers preview room
 - publisher’s office
 - president/chairman’s hospitality office
 - pre- and post-congress storage
 - trade and/or technical exhibition
 - book displays
- Scientific programme/technical back-up
 - CME accreditation procedures and guidelines
 - acceptable presentation electronic formats for speakers
 - distribution system of presentations at venue
 - projection, video, microphones, public address, electronic voting, recording
 - technicians
 - speakers’ briefings
 - presentation preview system
 - notes for speakers
 - poster sessions
 - support, format, and notes for poster presenters

- Venue support, directional signs, stage sets
 - directional signs
 - electronic message system
 - stage sets, lecterns and screens
 - flowers and plants
 - setting-up and breaking down
 - internal TV circuit
- Equipment and furniture
 - equipment: PCs, monitors and printers
 - secretariat needs, supplies of stationery, photocopiers
 - office furniture, refrigerators, lockable cupboards
 - setting-up and breaking-down
 - communication lines, voice and data transmission
- Catering
 - space requirements
 - choice of menus and wines
 - costs and contracts
 - catering schedules and timetables
- Liaison with organisers of satellite meetings

D3 Production and distribution of documentation pre- and during congress

- Creation of logo, choice of colour scheme, image for print and design of layout
- Standard and extent of each print item
- Collation and production of “copy” for each print item
- Translation of “copy” for each print item into the agreed official languages
- Establishing and maintaining print deadlines
- Proof-reading in all languages
- Liaison with printer on deliveries
- Liaison with printer and packers on distribution both pre-congress and for congress
- Production and distribution of proceedings
- Production of participant list

D4 Staffing on site

- Registration and information staff: uniforms, timetables, contracts and tax
- Secretariat, timetables and contracts
- Catering supervisors
- Ushers
- Security staff
- Porters, electricians
- Pre-congress briefing for all staff
- Provision of timetables, schedules, instructions for all staff
- Staff refreshments

D5 Technical tours programme

- Choice of visits and hosts
- Invitations and ticketing
- Liaison with hosts
- Arrangements, buses, guides, meals

D6 Language services management

- Appointment of professional translation company
- Progress of language print: proof-reading and deadlines
- Appointment of professional simultaneous interpretation team
- On-site arrangements for interpreters

D7 Promotion and publicity

- Agreement on mailing lists
- Choice of advertising media
- Liaison with journal editors re editorial
- Management of mailings and postal rebate system
- Research on related associations and congresses for additional distribution of publicity material
- Attendance and promotion at related congresses

D8 Registration of delegates

- Advance registrations
 - receipt and monitoring of registration fees
 - group registration requirements
 - maintenance of registration fee bank account
 - issuing of confirmations and receipts
 - handling cancellations and refunds
 - collecting unpaid fees
 - repayment of overpayments received
- Onsite registration procedure
 - setting up computerised systems
 - organisation and supervision of delegate kit packing, badge production, pre-ordered tickets
 - language allocation for tickets and print
- On-site registrations
 - setting up desk registration system
 - cashier arrangements
 - payment of expenses to speakers
 - on-site ticketing, name badges, distribution of delegate material/kits
 - addendum to participant list

D9 Social programme

- Overall responsibility for programme choices: welcome reception, concert, dinners, gala
- Financial responsibility
- Procedures for opening and closing ceremonies
- Guests and VIP lists (local and international)
- Official functions: open or closed events
- Other official functions: President's lunch or dinner, government hospitality, executive or speakers' events
- Accompanying guests' programme
- Pre- or post-congress tours
- Related social events: hospitality by Embassies, exhibitors, and sponsors
- Transportation

D10 Accommodation scheme - hotels and colleges

- Range of hotels to be offered in different price categories
- Agreement/contract with hotels and universities/colleges
- Liaison with hotels, etc., notification, rooming lists, deposits, cancellations
- Advance hotel accommodation booking
 - speakers and VIPS requirements
 - industry requirements
 - receipt and monitoring of payments fees
 - issuing of confirmations and receipts
 - handling cancellations and refunds
 - collecting unpaid fees
 - repayment of overpayments received

D11 Organisation of technical or trade exhibition and raising of sponsorship

*Refer to IAPCO document: **Sponsorship Prospectus***

prepared by the Healthcare Congress Alliance: IAPCO, IPCAA, HCEA.

D12 Press

- Accreditation
- Advance newsletters
- Press releases
- Press briefings
- Press officer
- Post-congress press releases
- On-site arrangements

D13 Security

- On site
- Offices
- Security police, guards
- Security scanning, arches
- First Aid

*Refer to IAPCO document: **Safety and Security at Congresses***

prepared by the Healthcare Congress Alliance: IAPCO, IPCAA, HCEA.

Reference Guidelines

All IAPCO documents and guidelines can be obtained from IAPCO or from the IAPCO website to assist in the planning of your event.

Disclaimer

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