

## HOW TO CHOOSE THE RIGHT PCO

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

### **WHAT IS A PCO?**

A PCO is a company which specialises in the management of conferences. 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 type 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 conference organisation.

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 conference management for which you cannot provide the knowledge, 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 conference management and work with you in partnership to ensure the success of your conference.

## **WHEN DO YOU NEED A PCO?**

A PCO can be brought in at different stages during the planning process. However, 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 conference 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 organisation of your conference. They can also offer help in the preparation and presentation of bids to win a conference 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 or CINZ PCO members
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 conference. 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 minimum information to be included is:

- No. of days of the conference
- How frequently the event is held
- No. of delegates
- Registration fee at previous conference in the series if known
- Accommodation requirements

- Social (evening) events to be included in registration fee, e.g. welcome, conference dinner, etc.
- 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
- Description of pre- and post conference events, if required

For accurate estimates please refer to data from previous conferences and adapt this where necessary. The more accurate this information, the more accurate the PCO can be in its estimates for you.

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

A PCO charges for its services. There are many ways in which it can charge depending upon cultural traditions and organisation 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 conference 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 CINZ, please see the list at the back of this document or visit the website for full contact details: [www.conventionsnz.com](http://www.conventionsnz.com)

## **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:

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

## **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 expensive 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 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. When selecting companies for interview it is important to let them know which particular issues, if any,

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 cost effective price.

There are also some fundamental issues, which should be addressed:

1. Does the company have a proven track record in organising your type of event e.g. corporate, association or government?
2. Does the company have a proven track record in organising events of a similar size and in similar venues?
3. Is the company financially sound and does it have a sensible amount of forward business to suggest it 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 conference organising type services. An accredited PCO, however, has no conflicting interests, the main activity of the company being that of conference organisation, 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 conference organisation.
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 conference income remains your property and you have the right to make financial decisions.
9. What procedures are in place should unforeseen circumstances affect key conference staff involved in the event immediately prior to the conference (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 CINZ, ICCA or IAPCO and are these relevant?
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.

## *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 conference bids
- Venue research and feasibility
- Advice and consultancy services
- Help in defining objectives
- Guidance on conference taxation liabilities
- Preliminary outline plan
- Draft income and expenditure budget
- Finance consultancy – pre-finance, sponsorship, exhibition, loans, registration fees
- Book-keeping, GST returns
- Control of bank accounts, income and expenditure ledgers
- Venue negotiation
- Organisational structure
- Meetings with organising 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
- 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 conference accounts
- Post-event evaluation
- Design and print (conference image)
- Electronic information and design
- Gifts and conference accessories
- Insurance cover
- Food and beverage
- Décor and staging
- On-site services – electronic message systems, signs, security
- Audio-visual equipment
- Simultaneous interpretation
- Conference recording
- Translation of conference documentation
- Videoconferencing
- Accommodation bookings
- Tour programmes

**Feedback:** CINZ recognises that the above list is not exhaustive and may not cover every element of the work of the PCO. CINZ would, therefore, welcome comments and suggestions for future inclusion in any new editions.

Thank you. [admin@nzconventions.co.nz](mailto:admin@nzconventions.co.nz)

## *Appendix B*

### **CINZ PCO Members with CINZ / MEA Accreditation**

Margaret Brown AMM	Conference Office, University of Canterbury
Amanda Graham AMM	Six Hats Ltd
Sue Hatchwell AMM	Conference & Function Services
Neil Maitland AMM	Conference Brokers Ltd
Janet Matheson AMM	Conferences & Events Ltd
Megan O'Brien AMM	Conference Innovators Ltd
Jan Tonkin AMM	The Conference Company Ltd

### **CINZ PCO Members Non-accredited**

Sally Bary	Forum Meeting Planners Ltd
Lynda Booth	The University of Auckland
Justine Carr	Corporate Events & Marketing Ltd
Terri van Schooten	Verve Consulting Ltd
Rosemary Hancock	événements Ltd
Lee Harrison	Fairdene Productions
Vickie Hill	Queenstown Destination Management
David Hughes	Incentives & Conventions International
Emma McDonald	NZ Destinations
Angela Moors	Events Direct Ltd
Caroline Ocego	Events to Conferences Ltd
Robyn Radomski	Conference Works Ltd
Fran van Til	e.events Ltd
Paul Walker	Convention Management Services Ltd
Warren Webber	VetLearn
Barry Williams	Bruce Mason Centre
Carlene Marshall	Event Mergers

### **CINZ / MEA ACCREDITATION**

PCO Members who have attained the above qualification have gone through a rigorous process involving a thorough review of their systems and practices by representatives of MEA in Australia, who in conjunction with CINZ run the New Zealand PCO Accreditation process. Personal interviews with accredited PCOs have taken place and referees have been consulted in terms of the PCO's previous work history with the objective of ensuring that CINZ / MEA Accredited PCOs are extremely well qualified and experienced to carry out all aspects with professional conference management.