

Addendum D: Professional Congress Organiser (PCO) requirements

1. Preamble

As with all SASA activities, the SASA Congress is governed by the SASA Bylaws.

Specific reference is made to the following clauses in the SASA Bylaws:

3.1.3 Congress Organisation:

In organising the congress, the diversity of the country and the society should be reflected in all aspects – the composition of the Local Congress Organising Committee (LCOC), the Scientific committee, the chairpersons of the different session, speakers and workshop presenters.

3.1.3.1 *The hosting Branch will convene a LCOC which should include both Private and Public Sector SASA members. The Committee shall also include at least one member representative of the Pharmaceutical and one member representative of an Equipment company likely to be involved with exhibiting at or otherwise supporting the congress. The SASA CEO and National Secretary will be members of the LCOC, representing the strategic objectives of National Council. All decisions / deviations from the SASA Bylaws MUST be approved by the SASA Council / Executive Committee (Exco) and not only with the LCOC. All agendas, minutes and financial reports should be copied to the National Secretary.*

Young professionals in both private and academic sectors should be encouraged to participate on all levels. It is advisable that the chairperson of the Scientific Committee contact all Anaesthesiology HODs of all Universities at an early stage and request them to nominate speakers and Abstract review committee members. The SIG liaisons, as referred to under point 3.1.3.5 below, should also consider diversity and development when making speaker proposals.

3.1.6 Member Development:

3.1.6.1 *Aligned with SASA's mission and in the interests of diversity, development and a sustainable profession and future, development of young professionals is promoted and encouraged through incentives directed to university departments and the congress specific member development initiative.*

3.1.6.4 *Due consideration in proposed speakers must be given to diversity and development of the profession and from within their department. Development should include diversity which is generally reflected in geography, background, gender, race, professional and life experience and the country demographic in which we live.*

3.1.7 Speaker And Session Diversity

3.1.7.1 *In the interests of diversity and development of the Society, the LOC must ensure that speakers invited to deliver presentations at congress should consider same where diversity is generally considered to be reflected in geography, background, gender, race, professional and life experience and the country demographic in which we live.*

The LCOC shall prepare a PCO brief and obtain quotations and shortlist at least three PCOs based on the brief.

Post COVID, there is a requirement for all events to have a virtual component to them. This may constitute a fully virtual event or hybrid (combination) event, including live-streaming or pre-recorded sessions to be watched later, depending on when and where the Congress is to be held. Therefore, the appointed PCO must be able to assist in delivering a professional hybrid / virtual experience if required and the LCOC will clearly communicate these in the Request for Proposal (RFP) document.

The PCO quotation must include a company profile demonstrating sufficient staff resources, knowledge, skills, event management tools and equipment to plan and co-ordinate conferences of comparable size and complexity.

The PCO quotation must include references and contact details for clients of at least three conferences of similar size and complexity.

The PCO quotation must include billing requirements and a statement on commissionable income.

The PCO shall be obliged to submit:

- a membership certificate, confirming that the PCO is a registered member of SAACI (Southern African Association for the Conference Industry), and
- A valid tax clearance certificate.

The PCO brief document is to include the following:

- Introduction
- Describe the nature / aims of the Congress: This should include the expected or planned number of delegates (both in-person and virtual), as well as a sponsorship target amount to be acquired, and the number of stands to be sold to trade exhibitors.
- An understanding of the various types of functions constituting the entire event should be detailed e.g. Refresher Course, Workshops, the Main Congress and Social functions.

The PCO competency requirements are detailed below:

2. PCO Competencies

2.1. Planning and Reporting

- Recommending and sourcing appropriate venues for respective functions,
- The selection of a suitable digital events platform and the effective management of such to complement the "in-person" programme,
- Prepare agendas, attend planning meetings and taking of minutes,
- General direction and guidance,

- Assign a Project Manager to handle logistical & administrative arrangements,
- Conducting site inspections,
- Develop a project plan consisting of a timetable of actions (due dates / deadlines) and responsibilities,
- Handle all correspondence,
- Provide regular updates on activity status. This includes, but is not limited to, monthly financial reports on registrations, sponsorship revenue acquired, marketing and advertising expenses, and quantity of adverts placed etc.,
- Coordinating the various agreements submitted by the suppliers, and
- Liaison with the Local Congress Organising Committee (LCOC).

2.2. Finance

- Develop a conference budget (detailed line-item budget),
- Include all virtual event platform costs in the budget,
- Budget control,
- Conduct monthly audits on expenditure against budget,
- Monitor all payments,
- Submit monthly finance status reports,
- Manage revenue accrued from registration, sponsorship and exhibition in conjunction with the LCOC,
- Organise insurance for third party public liability and the cost of the conference if approved by the LCOC,
- Discuss all legal issues / contracts with concerned parties,
- Liaising with selected accounting firm to ensure proper reporting, and
- The final Congress financial statements are to be audited by a registered auditor and report submitted to SASA CEO and LCOC Chair. The audit cost will be for the account of the PCO.

Note: No expenses may be committed without the express and written approval by the designated authority within the LCOC.

2.3. Registration

- Coordination of registration fees and deadlines,
- Building of a comprehensive database,
- Design of registration form,
- Management of registration files,
- Correspondence with delegates: confirmation letters, invitation letters, receipts,
- Management of payments: credit card, cheque, transfers etc.,

- Preparation of regular registration reports: No of delegates / funds collected / funds outstanding / country reports / no of delegates registrations for social events, tours,
- Preparation of delegate lists by alphabetical order / country of origin,
- Concept and design of registration materials such as delegate badges / vouchers / passes / certificates of attendance / receipts / social tickets / production of registration materials and registration packs,
- Supervision of on-site registration process,
- Distribution of registration materials,
- Handling of all new registrations on-site as well as payment of pending registrations, and
- Set-up of supervisory staff at workstations for: pre-registered delegates / on-site registrations / accompanying persons / tours / exhibitions / general information and help desk.

2.4. On-Site Management

- Set-ups and staging,
- Placement of signage to, and ensuring that adequate directional signage is provided in all areas,
- Review traffic flow patterns,
- Security services coordination,
- Technical assistance to the speakers,
- Staffing and supervision of the speaker preparation room, and
- Schedule briefing session with venue staff support and personnel and manage all on-site logistics of congress.

2.5. Digital Events Platform Management

- Act as an advisor to the LCOG regarding the virtual elements of the event,
- Establishing the virtual component of the event on a suitable digital events platform,
- This will include the ability to live-stream and/or record all sessions,
- Engaging and management of experienced IT provider to manage the technical aspects required,
- This will include simple and reliable attendance tracking of delegates for CPD accreditation purposes,
- Assistance to and co-ordination of speakers to engage effectively with the platform. This may include speaker rehearsals and inclusion of speaker material into the digital events platform,
- Requesting and obtaining recording permissions from speakers to record sessions and share these recordings post the event – this will include ensuring recordings are obtained well in advance of the date of presentation,
- Assistance to trade in order to represent themselves on the virtual platform if required, as well as provide guidance and suggestions to exhibitors on how to gain maximum value of a virtual booth, and
- Registration of delegates that wish to attend virtually.

2.6. Marketing

- Develop a marketing plan for the Congress, that includes communication channels to be used and costs,
- Liaise with **SASA Communications Manager** for branding and logo development requirements,
- Establish event-specific digital platforms such as a website or mobile app adhering to branding guidelines. (This may include incorporation into an existing SASA app on a temporary basis).
- Develop branding and logo,
- Develop conference colour specifications,
- Supervision of the website design, production and updates,
- Supervision of the design and production of interactive forms: on-line registration, on-line abstract submission,
- Design announcements / posters and call for abstracts and e-mails for electronic announcements,
- Brief and appoint a professional exhibition organiser if needed,
- Brainstorm gifts for speakers, and
- Develop and print branding material / conference pack.

2.7. Programme and Speakers

- Act as an advisor to the LCOC concerning the development of a suitable academic / scientific programme for both the in-person and virtual components of the event,
- Research and engage with potential speakers,
- Design of abstract submission instructions document,
- Preparation of call for papers,
- Building of a comprehensive speaker database,
- Collection of abstracts, reply forms and speakers' materials,
- Management of speakers' files,
- Administration of payment of fees and expenses,
- Speaker correspondence regarding aspects such as audio-visual requirements, publications and travel arrangements,
- Coordination of the different sessions' chairpersons,
- Liaising with **SAJAA** (South African Journal of Anaesthesia and Analgesia) in the production of Congress and Post-Congress editions of the publication (articles / abstracts and proceedings), and
- Develop a checklist for speaker and workshop equipment requirements.

2.8. Social Events

- Develop a social events programme for delegates,
- Develop a programme for all persons accompanying delegates and speakers,
- Book and contract all venues concerned,
- Identify and source entertainment,
- Identify transport requirements for social events, and
- Develop menus / invitations / seating plans.

2.9. Congress Venue

- Source, book and contract venue,
- Provide recommendations for:
 - Audio-visual equipment,
 - Computers and other equipment,
 - Food and beverage,
 - Signage,
 - Security and access control,
 - Health and safety,
 - Communications, Wi-Fi, telephones etc., and
 - Entertainment.
- Shipping and storage,
- Allocate the number of rooms required at the venue,
- Identify and source audio visual supplier,
- Identify staff requirements,
- Develop a health, safety and security plan,
- Arrange for breakfasts, lunches and dinners at the conference venue, and
- Establish a business centre and admin office

2.10. Site Inspection

- Coordinate site inspections to include venue inspections, hotel inspections, off-site venues for social programme and scheduling meetings with tourism officials.

2.11. Accommodation

- Recommending hotels that are within the venue's vicinity,
- Communicating with hotels to finalise the rates and the terms and conditions,
- Designing a map featuring all the hotels for printing in the announcement booklets,
- Monitoring deadlines for payment and submission of rooming lists to hotels,

- Receiving and processing all registration forms,
- Compiling rooming lists according to the hotel's requirements, and
- Liaising with the hotels on the shuttle services provided.

2.12. Tours and Transport

- Identify and source transport service providers,
- Develop a transport blueprint plan,
- Organise airport clearance and welcome desks at the relevant airport,
- Review traffic flow patterns,
- Secure all vehicles needed to accommodate each aspect of the programme, shuttles, tours, evening events,
- Driver instructions and maps,
- Vehicles for disabled passengers,
- Provide written schedules / confirmations,
- Signage for coaches / shuttles,
- Coordinate all aspects of transportation, and
- Source possible pre- and post-Congress tours.

2.13. Exhibition

- Appoint exhibition manager,
- Budget preparation / exhibition rates,
- Design exhibition prospectus,
- Arrange trade meetings with potential exhibitors,
- Mailing of invitation to exhibit to potential exhibitors,
- Compile and keep current a database of all exhibitors and communicate with them in the appropriate manner,
- Assistance to trade with representation of themselves on the virtual platform if required,
- Provide guidance and suggestions to exhibitors on how to gain maximum value of a virtual booth,
- Preparation of contracts,
- Planning of floor space / design,
- Allocation of the reserved and sold floor space,
- Update of the floor plan allocation,
- Lay-out, décor and signage,
- Security, traffic flow control and maintenance of the area,
- Coordination of:
 - Set-up / receiving,
 - Management of on-site personnel, and
 - Management of IT provider for virtual event platform component.

- Liaise with the City Council and fire departments to obtain the necessary clearance and safety certificates that pertain to the exhibition area,
- Organise and manage appropriate security for the exhibits on a 24-hour basis, starting the day of set-up until the day of breakdown, and
- Design and coordination of special activities.

2.14. Sponsorship

- Develop and implement a marketing strategy for the event specifically geared towards acquiring trade sponsorship. This includes initial communication and follow-up sales calls,
- Continuous liaison with both potential and confirmed sponsors,
- Development of budget for direct costs,
- Development of a sponsorship package / programme,
- Establish sponsorship levels,
- Develop innovative opportunities for sponsorship including virtual sponsorship,
- Hosting meetings with potential sponsors,
- Preparation and collation of contracts,
- Supervision and coordination of the design, printing and distribution of the promotional materials, and
- Organisation and coordination of corporate events.

3. Fee Structure

SASA recognises that different PCOs may have different fee structures, however the following fee structure is recommended:

Fixed Fee: A detailed listing of service fees according to the headings and services specified in the brief. These service fees will be fixed for the duration of the service contract and may be reconsidered on application by the LCOC, only if the briefing specification changes significantly from the time of appointment. It is incumbent on the PCO to determine the exact specifications of the service requirements and quote accordingly. Assumptions of services and misunderstandings will not constitute any grounds for an increase in fixed fees.

Variable Fee: A fee that is linked to a unit such as a delegate registration and abstract management and/or sponsorship value. The LCOC will want to incentivise both attendance and overall surplus earned through the Congress.

All fees related to the procurement and effective coordination of a virtual events platform (that may include a mobile app component) must be clearly outlined in the proposal.

Any commissionable earnings by the PCO from third parties (suppliers) to supplement revenue must be clearly stated.

The following must be detailed:

- the nature of a commissionable agreement with 3rd parties (suppliers);
- the percentage commissionable earnings and the estimated financial value of such earnings or in lieu of the above
- a statement that the PCO does not accept nor receive commission from any suppliers, associates or stakeholders of the Congress.

The combination of the fixed fee and total variable fee will serve as the project service fee quotation. If third party commission is earned by the PCO, the value thereof will be taken into consideration.

The PCO must propose a payment plan with the quotation. SASA will not pay more than 75% of the agreed service fee in advance of the conference, and then only on a pro-rata basis after the Congress earned revenue from registrations, sponsorship and exhibition sales. The remaining 25% of the agreed service fee will be paid after successful conclusion of the Congress contract.

If an alternative fee structure is proposed, it should be explained in detail and the total value thereof be clearly quantified.

4. List of PCOs with Proven Records re: SASA National Congress

- Eastern Sun Events, Port Elizabeth – 2006, 2011, 2013, 2017, 2018, 2019, 2020
- Velocity Vision, Johannesburg - 2022
- Marianne Oosthuizen Conference Services, Bloemfontein – 2002, 2010, 2016
- Royal House, Durban – 2009, 2015