



PCO Action Checklist

You may consider using a Professional Conference Organiser (PCO) for your conference. The following list is designed to help you decide if you need one, and what responsibilities to assign your PCO. The next step is to return your check list to the Edinburgh Convention Bureau (ECB). We will send your requirements to PCOs in our membership and request bid proposals from them.

Please supply as complete a picture of your event as possible. This will help PCOs more accurately determine the extent of their services which you may require.

(Tick if interested)

Marketing and mailing

- design and prepare programme leaflets, letters of invitation and other literature
 - advise on marketing strategy providing general PR support
 - identify potential sponsors
- Estimated print-run for mailings _____

Event Management which may include:

General management and reporting systems

- establish and monitor budgets, financial accounting and banking procedures
Budget for previous event _____
Delegate registration fee and items it covered _____

- provide a secretariat in the build-up to, and during, an event; and produce regular summary/progress reports
size of organising committee _____
frequency of meeting _____
- ensure that all contacts and actions taken with suppliers are noted and communicated to client
- liaise with participants on registration, accommodation and technical (e.g. audio-visual) requirements
- maintain a computerised management system to process all registration details,

- receipts and expenditures
- establish timetable for event planning, exhibition buildings and breakdown

Registration and administration

- administer delegate registration at the event
- supply staff and facilities for an information desk to handle queries and messages
- will association volunteers be used _____
- produce name badges, invitation and place cards, menus, document wallets and other printed material, and ensuring their efficient distribution

Venues and related facilities

- conduct negotiations with venue managers and ensure suitable meeting space is available for all aspects of the event, including plenary and break-out sessions, reception areas, press and private meeting facilities
- supervise meals, catering and tea/coffee breaks, ensure menus and drinks are to the satisfaction of the client and taking account of medical or dietary requirements
- provide directional signs where needed
- provide for speakers' requirements
- Estimated number of speakers _____

Overnight accommodation and transport

- provide an accommodation booking service confirming reservations with participants; produce rooming lists; and monitor and take-up of rooms to avoid incurring cancellation penalties
- co-ordinate and supervise transfer services between the main venue, social venues, airports and railway stations

Audio-visual and back-up facilities

- organise lighting, technical operators, and decor/floral requirements
- arrange audio-visual equipment: video, 35mm slides, overhead projection, auto-cue and recording facilities
- design and produce promotional boards, banners or other signage
- organise telephone, fax, photocopying, photographic, first aid and security services as needed, and providing an on-site secretarial service
- arrange simultaneous interpretation and equipment

Social programmes

- plan and organise a comprehensive social programme, including welcome receptions, gala dinners, whisky tastings, tours and other entertainment

- arrange accompanying persons' programmes where appropriate, including day and half-day tours and visits to places of special interest

Exhibition services

- space allocation and sales:
 - develop promotional leaflets and layout plans
 - identify and contact potential exhibitors
 - draw up contractual obligations, including cancellation fees for withdrawal
 - exhibitor liaison and contractor arrangements:
 - ongoing liaison with exhibitors and contractors
 - negotiate terms and conditions and appoint sub-contractors, including shell schemes, decor, cleaning, rubbish disposal and lighting/electrical services;
 - ensure that all exhibitors and contractors have appropriate insurance
- exhibition build-up, management and breakdown:
 - inform exhibitors of build-up and breakdown arrangements
 - provide adequate security cover
 - liaison with Fire and Emergency Services' authorities
 - provide and staff an organisers' office

estimated number of exhibitors _____

estimated target revenue from exhibition _____

Post-event activities

- design and distribute evaluation questionnaires to assess the degree to which objectives have been met, successes and failures, strengths and weaknesses, and pointers for future development
- write and send thank you letters
- provide final financial report

CONFERENCE HISTORY

Details about the history of this event are extremely helpful in establishing the PCOs to address your meeting needs. Please provide any information you have available either on a separate sheet or using this form. A summary of the last conference is always helpful.

Revenue Generated by Past Exhibition (s)

Association Mailing List Size

Previous Destinations and Venues

Description of Delegates (eg consultants, sales managers, nurses)

Description of Style of Meeting(eg academic, promotional, training)

Association Affiliation + Headquarters

Will Planning meetings involve travel outside the UK for the PCO?

Website address

I would prefer to receive proposals by email/in hard copy* delete as appropriate

I require _____ copies of the proposal