



IFBLS

**Appendix: Planning Guidelines
for a
World Congress of Biomedical Laboratory
Science**

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Introduction

These guidelines are prepared to offer assistance in the planning of the International Federation of Biomedical Laboratory Science (IFBLS) World Congress. While attempting to be comprehensive, it is not possible to predict and legislate for every situation that may develop. Likewise, it is not anticipated that every Congress planner will encounter every one of the scenarios referred to in the guidelines; the local situation will dictate the challenges to be met.

The guidelines can act as a checklist of tasks to be undertaken, signal some of the pitfalls to be avoided and prompt the Congress organizing committee to consider aspects of Congress planning that might not have otherwise occurred to them. They should be used in conjunction with the Congress Guidelines document.

As you cannot do everything alone, you should assemble around you a team of enthusiastic specialists who are as committed to the success of your event as you are. It is to you they will look for leadership. It has been often said that if you want a task done give it to a busy person. While this is generally true, there are some tasks that are so time and resource consuming, that even the most willing of busy persons might be unable to complete them. It is important, therefore, when putting together the Congress Organizing Committee that the individual members are able to make available the time required to complete the tasks ascribed to them.

Congress Planners fall into two main categories: The first is the Congress Organizing Committee of the member association of IFBLS that has agreed to host the World Congress. The second is a Professional Conference Organizer (PCO) who may be hired to plan and manage the event on behalf of the client. A Host Association may also assume this role.

The purpose of every congress is to communicate, whether it is information, ideas or simply enjoyment, so anyone responsible for planning a congress is in the business of communication. As the organizer your task is to ensure that this communication process is effective. It may entail the selection of topics and speakers, creating programs and evaluating success as well as the logistic tasks of venue selection, registration, transport and function planning.

It is also important to remember that you are not the first person planning a world congress. There is, consequently, a wealth of pre-existing information into which you can tap. You are one in a long line of organizations that have previously organized this particular event. Make use of their experience, particularly from recent congresses. People who have been there before are usually more than willing to share information, particularly in relation to the unexpected pitfalls they encountered.

You will not be the first to plan a congress in your particular venue and location. Find out what other conferences have been held there, particularly those that relate in size to the World Congress you are planning. Talk to the local Chamber of Commerce, the local Convention Bureau and local PCOs.

Planning

Setting Objectives

Define the rationale behind the Congress:

- For what purpose is the Congress being held?
- For what reasons do delegates attend the Congress? Is it to be educated, informed, and entertained or to conduct other business?
- Define measurable outcomes. Unless you can measure certain outcomes you will not know if the Congress has been a success or a failure.
- Outcomes can be financial. Did the Congress break even or make a profit? Did the profit arise from the delegate attendance or from other sources such as sponsorship or a trade exhibition?
- Outcomes can be educational. Were the academic sessions well attended? What did the delegates think of the academic content? Was it pitched at the right level? Was there a Poster Session? Was it of good quality? Did the posters engender much interest? Was there much interest in the Awards?
- Outcomes can be technological. Was the technical quality of presentations acceptable? Did all the AV equipment function as it should? Were the speakers happy with the facilities provided?
- Outcomes can be professional. Did the Congress succeed in raising the profile of the profession? Did the Congress get media coverage? Was the media coverage print based or radio/TV based?
- It will be necessary to put measuring systems in place in order to ascertain the success or failure of the Congress. Questionnaires, for completion at the end of the Congress might be included in the literature sent to delegates, speakers, sponsors and exhibitors, or provided as digital evaluation by email. Questionnaires should be rigorously defined so as to be unambiguous and provide the information you require. Answers should be by way of check-boxes. Do not expect people to write long subjective answers to questions.

Having defined your aims and objectives it is important to stick to them.

Planning the Congress

The importance of detailed planning cannot be over emphasised.

Draw up a list of the subjects for which you will need to plan. Try to separate them into time related topics. It is important that a timeline is prepared that encompasses all the tasks that have to be completed and their deadlines. Topics that need to be considered are: -

- Venue selection
- Request for Proposals(RFP's)
- Site inspections
- Travel
- Accommodation
- Delegate welfare
- Catering

- Social and recreational
- Printing
- Trade show
- Sponsorship
- Academic program
- Awards program
- Poster program
- Free paper presentations
- Delegates
- Speakers- (fees for registration, honoraria, travel and accommodation coverage)
- VIPs-(fees for registration, honoraria, travel and accommodation coverage)
- Rehearsals (timing of)
- AV and IT
- Media coverage
- Marketing and website
- Credit card payment of Congress fee online
- Budget - Refer to IFBLS Guidelines for Hosting a Congress
- Evaluation
- Contingencies

No one expects you or your organization to have expertise in all these areas. However, as indicated above, there are those who have.

Planning Programs

Money, time and participants are the three crucial factors when it comes to planning the Congress program. You should take into account:

- The aim of the Congress
- What the chosen location and venue offers (and when)
- The duration and timing of the event
- The nature of the delegates and if they are accompanied
- How far the delegates have travelled
- What the delegates are accustomed to
- The timings of crucial business sessions, such as the General Assembly of Delegates (GAD) for example, and any trade show
- The availability of speakers
- The timings of the main social events
- Levels of interest in session topics
- Any logistic factors, such as the availability of rooms
- Transfer times to other locations
- The potential effects of the weather
- Potential effects of any circumstance that can be considered a force majeure

It is important to allow a certain level of flexibility in the program so that the unexpected, such as a 'no-show' by a speaker, does not create a disaster.

Project Plan

A project plan with milestones should be set up early to make sure all major tasks are getting done in time. Planning should ideally start three to four years before Congress or longer. The project plan must be adapted by each Congress organizer. Many of these items will be managed by the PCO, but you should agree on responsibilities and deadlines for all tasks. Note that the proposals below are not listed

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according to when deadlines must be set, as several processes will be going on at the same time. All list items should have deadlines and name who are responsible for progress. The project plan must be updated regularly to make sure no items are overlooked. Some items you should consider including are:

PCO selection

- ✓ Identify candidate PCOs
- ✓ Check references and prices
- ✓ Approved by IFBLS
- ✓ Sign PCO contract

Setting Objectives and Theme

- ✓ Setting objectives
- ✓ Generate theme ideas
- ✓ Agree theme
- ✓ Create theme description
- ✓ Create Conference logo / graphics

Bidding

- ✓ Prepare bid
- ✓ Sign contract with IFBLS

General

- ✓ Appoint Project Manager
- ✓ Agree conference pricing
- ✓ Create conference plan
- ✓ Produce conference agenda
- ✓ Produce detailed plan
- ✓ Create conference budget with pricing of fees
- ✓ IFBLS approves budget

Important dates to be established

- ✓ Call for abstracts deadline
- ✓ Early registration fee deadline
- ✓ Late registration deadline
- ✓ Accommodation booking deadline

Venue

- ✓ Identify candidate venues
- ✓ Get venue quotes and availability
- ✓ Agree venue
- ✓ Agree date
- ✓ Approved by IFBLS
- ✓ Sign venue contract
- ✓ Update Conference budget
- ✓ Decide on menu
- ✓ Check on AV requirements
- ✓ Decide on room layout

Accommodation

- ✓ Identify relevant accommodation in different price ranges.
- ✓ Secure bookings at negotiated rates

Delegates planning

- ✓ Travel advice
- ✓ Accommodation

Decide social & recreational program

Abstracts and posters

- ✓ Set criteria
- ✓ Publish call for abstracts
- ✓ Review abstracts
- ✓ Approve abstracts
- ✓ Confirm and add free lectures to conference program

Speakers

- ✓ Identify possible speakers
- ✓ Invite speakers
- ✓ Confirm speakers
- ✓ Communicate presentation deadlines to speakers
- ✓ Obtain and agree session abstracts
- ✓ Create abstract book

Marketing

- ✓ Communicate date, theme and venue at prior conference/meetings
- ✓ Put conference information on website
- ✓ Create press release
- ✓ Send out press release
- ✓ Feed Facebook and Twitter regularly
- ✓ Create conference-related newsletter article (repeat at regular intervals)
- ✓ Publish newsletter (repeat at regular intervals)

Staffing

- ✓ Draw up staffing requirements
- ✓ Confirm check-in staff
- ✓ Determine compensation at the Congress for volunteers/committee members, i.e. free participation at the Congress

Post Conference Evaluation

- ✓ Place presentations and report on website
- ✓ Sent out any agreed output
- ✓ Write to thanks presenters and offer feedback if required
- ✓ Create conference report
- ✓ Send conference report to press
- ✓ Submit final project statement to IFBLS

The Venue

Venue Selection

The country in which the Congress is to be held will depend on a number of factors:

- It is the policy of IFBLS that the World Congress has a global impact. Therefore, Congresses are held in different countries and on different continents. The location of previous Congresses will be a factor when seeking new venues.
- While wishing to spread the IFBLS net as far wide as possible, it is acknowledged that some member associations do not have the internal resources required to undertake such a major event.
- Budget
- Ease of access and travel time for delegates
- Delegate expectations
- Political and social considerations
- Climate
- Local attractions
- Local levels of support
- Provisional program
- Stake holders needs
- Visa requirements
- Need of vaccines

Member associations intending to host a World Congress will have to decide on a suitable location. Factors influencing the decision might include:

- Resort
- City Centre
- Proximity to airport
- Convention facilities
- Hotels
- Support from local Chamber of Commerce and/or Convention Bureaux

Sources of Advice

When you embark on planning the Congress there can be a feeling of isolation as you explore unfamiliar territory. In reality the business is teaming with people who can help and advice.

Material in print

- Venue directories
- The Internet
- Yellow Pages
- Travel guides
- Trade magazines
- Hotel guides
- Material already on file

Agencies/Others

- Travel agents
- PCOs
- Hotel group central reservations offices
- Airlines
- Trade Exhibitions
- Conference industry associations
- Familiarization visits

Request for Proposals (RFP)

Despite what hotels and convention centres will tell you, there is no such thing as a venue suited to everybody's need.

The site where you choose to hold the Congress will usually be the best available and you might have compromised to get it. But that should not stop you from seeking perfection.

At its simplest, the procedure goes as follows:

- Decide on a region or city
- Have a clear idea of the style of venue that will best suit your needs
- Prepare and send out a 'Request for Proposals' (RFP)

Bearing in mind:

- The aim of the Congress
- Dates
- Numbers attending
- Stake-holders need
- Budgets

Your RFP should contain a list of the features that the perfect venue will possess. Annotate those that are essential and those that are merely desirable, but explain in some detail the demands for meeting space, social function capacities and accommodation.

Add any other vital factors that will affect your choice of venue such as financial constraints, facilities for the disabled, catering needs or special AV demands. Include a provisional program and layout diagrams, if necessary.

Attach to this 'wish list' your 'Congress Profile' and send it, with a deadline for replies, to those venues that might accommodate your meeting in the region or city of your choice.

When you have compared all the responses it will become clear that your choice is surprisingly limited, so making a short list is easy. It is these short-listed venues that you will go to inspect.

Site Inspections

One of the most important tasks you will undertake is the visit to inspect potential venues. Even if you have a short list of one, a site inspection will be vital. You need to check out all those wonderful scenes in the brochure for yourself.

Start by arranging appointments for a tour of the facilities. It is only fair to the management of the venue you are visiting to prepare yourself, and them, for the encounter.

Give the staff ample warning and tell them what you wish to inspect and who you want to meet. Remind them of your requirements.

Information you should seek:

- References
- Booking conditions or a sample contract
- Social and recreational ideas
- A list of local suppliers

The venue's conference pack should give up all the basic information you need, such as room capacities and available services. However, it will not say much about management practices or staff attitudes, about negotiable items or the fact that the venue is situated under a busy flight path!

The most important thing to bring on the site inspection is a checklist of questions that you prepared in advance.

What to Negotiate

There are many ways to stretch your Congress budget and one is to negotiate the best deal with your chosen suppliers. Most things in life are negotiable, including the services that your venue will provide. However, do not be tempted to bully the management into ultra-low room rates. As a general rule it is better to pay a reasonable rate for facilities and accommodation and then negotiate added value.

For example, you might ask the venue to waive or reduce their charges for:

- Single occupancy
- Deposits
- Meeting rooms and AV
- Use of amenities (e.g. Disco, Sauna, Gym)
- Internet access/Wi-Fi
- Use of office equipment
- Storage facilities
- Signs
- Local telephone calls
- Parking
- Airport transfers

Ask for:

- Deposit waiver
- Late check out
- Free set up and breakdown days
- Free newspapers
- Extra porters
- Complimentary rooms on a basis of one per 50
- Free room upgrades
- Fruit or flowers in rooms
- Continuous tea/coffee service
- Pastries with coffee
- Menu and wines upgrade
- Welcome cocktail party
- Menu and place card printing
- Use of an office

Points to ponder

- When negotiating a package with the venue it is worth remembering the following fact: the vendor is in the strongest position. Vendors are in the business of making a profit and they know the price below which they are not prepared to go, either for individual services or for a total package. You do not know this price.
- Therefore, be sensible and flexible in your demands for better services and do not ask for all of the above at once if you want to preserve a cordial relationship with your vendor.

- The world is divided into hagglers/negotiators and those who are not. If you are one of the latter ensure that one of your inspection/negotiating team is a haggler. Otherwise you will end up paying top dollar for every service you purchase.

Venue Liaison

Probably the most important relationship that you will have as a Congress planner is with the management and staff of your chosen venue. They must become committed members of your team, sharing your vision of success.

Take time to plan (and discuss with your appointed Conference Coordinator), how best to motivate the staff so that they give you and the delegates exemplary service.

You may consider incentives, briefings, publicity, and recommendations, but the most effective contribution will be your own professionalism. Avoid sliding into a ‘them and us’ relationship. You have more to gain by working together than falling apart.

The venue will appreciate being kept informed of your decisions and any changes, throughout the planning phase. Establish procedures, confirm everything in writing, and make records of decisions. Keep them abreast of numbers, inform them of VIPs and other celebrities, involve them at every stage of your function planning. Seek their advice; they’ve seen it all before.

Prepare ‘Function Requirement Sheets’ for each session and function. These should include the following details: -

- What the function is
- Timings (including set up and tear down)
- Numbers attending
- Room layout (a sketch will be helpful)
- AV support required or brought in (blackout?)
- Internet access
- Extra furniture needed
- Table top extras (water, mints, pads, pens, etc.)
- Signs
- Staff required
- Security factors
- Any other special needs
- Name and contact for the function coordinator

Your relationship will be strengthened if you are prepared to be flexible in your demands. A sense of humour is just as important!

Catering

The delegates at the Congress may not remember a month later what they discussed, but they will remember the meals.

Due to illness, allergies or beliefs, certain delegates will have specific dietary requirements. Nuts and shellfish can present particular difficulties for persons with allergic reactions to the proteins they contain. Even small traces can have serious consequences, so it is important that the utensils used in the preparation of the food have not been in contact with allergens. Ensure that the Congress booking form contains a section wherein the delegates can list specific dietary requirements. When this information is collected it must be made known to caterers and banqueting managers.

If different venues are hosting different functions, menu coordination is necessary so that the delegates do not eat chicken at every meal.

Talk to all the banqueting managers, chefs and head waiters so that they feel involved in your overall plan.

Review their suggested menus, wine lists and bar prices.

Ask for photos of previous similar functions, client references, layout plans and capacities.

Discuss what the banqueting team enjoy doing, what is local and popular at the time of the year in question. Seek their ideas and suggestions.

In the restaurant check out:

- The menu
- The food (appearance and taste)
- The service
- Table décor
- Ambience and lighting
- Sound systems
- Disabled facilities and access
- Fire exits and general security
- Location of cloakrooms and toilets
- Food allergies and specific dietary requirements

Enquire about:

- Bar hours
- Staff to guests ratios
- Staff experience/training
- Language skills
- Breakfast (selection and speed)
- Hygiene procedures
- Recycling policies (will excess food be donated to charity)
- Consumption controls
- Corkage charges (wine)

The Delegates

Travel

Delegates are prepared to undertake long and arduous flights in order to attend Congresses. However, once they reach their destination they expect the Congress venue to be within easy access of the airport. Delegates will not undertake a six-hour bus journey, following a long-haul flight, no matter how exotic the location.

If the Congress is shown to be of importance and bringing business to the venue then the national carrier or local airline may be prepared to give concessions on flights for speakers or other VIPs.

It may also be possible to negotiate special airfares with the national carrier for delegates attending the Congress. However, in some instances, particularly in respect of group travel, delegates may be able to negotiate a local package that is cheaper than the special fares on offer from the national carrier.

The local organizing committee may arrange for a welcoming booth at the airport. Delegates arriving will be tired and may be unfamiliar with the local language, currency and customs. A welcoming presence, from which they may obtain information on transport to their accommodation, location of the Congress, currency exchange, etc., is much appreciated.

Accommodation

Delegates attending the Congress will be from a wide spectrum of social and cultural backgrounds. They will range in age from young to old. Their financial means will also vary.

The accommodation on offer must reflect these factors. The levels available should range from budget accommodation for those with limited financial resources to high-class accommodation for those who can afford it.

If possible; the accommodation chosen for the delegates should be within easy distance of the Congress venue. Ideally it should be within walking distance but if this is not possible it should be on a direct local transport route. Delegates will not wish to spend long periods of time travelling from their hotels to the Congress venue, nor will they wish to have to change buses/trains in the course of their journey.

Delegate Welfare

As the organizer of the Congress you have a responsibility for the well-being of the delegates. You have a moral and, in some cases legal, obligation to look after their physical and mental welfare.

This may entail that they are not in any danger from:

- Criminal activity
- Terrorism
- Fire
- Dangerous driving
- Food poisoning
- Un-regulated sports activities
- Extremes of climate and weather
- Any war, threat of war, riot, civil strife, industrial dispute or other circumstance that can be considered a force majeure

In this respect you should:

- Ensure that all delegates are registered
- Check the safety systems and procedures at your chosen venue
- Brief everyone on potential local hazards
- Inform about vaccines
- Check the hygiene certificates in kitchens
- Examine the competency certificates of organizers of hazardous sports
- Maintain a first aid facility
- Brief delegates on local weather situations
- Ensure that all drivers are competent and licensed
- Safeguard all baggage in your care
- Be aware of local medical resources
- Provide local contact person in case of emergency

Social and Recreational

Delegates expect that the program for the Congress will have a social content. Additionally, some delegates will be accompanied by spouses/partners who are not members of the profession. It will be necessary to provide an *accompanying persons* program for these. This can involve local sightseeing and shopping trips. The venue for the Congress will be an important factor in what can be arranged. Furthermore, some delegates opt to take their vacation as part of their trip to the Congress so it will be desirable to make information available on pre and post Congress tours and trips.

Delegates will derive the most benefit if there is time in the program for recreation. The best schedule is one that has a nice balance of work and leisure activities. The following factors should be taken into account when planning:

People factors

- The aim of the event
- Likely numbers
- Who the delegates are
- What they are accustomed to
- What their expectations are
- What they can afford
- The previous day's activities
- Travel fatigue

Time factors

- The time available for recreation
- Local shopping hours
- Transfer times to recreation sites
- The times of sunrise and sunset
- Times of meals, before and after recreation
- Times of special social events
- The work timetable

Local factors

- Climate and weather
- What the location offers
- What the venue offers
- Cultural constraints
- Capacities at attractions
- Entrance fees and gratuities

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- Catering
- Availability of resources such as, transportation, staff, special equipment, catering, accessibility services, toilets and on-site storage

Other factors

- Budgets of the organization
- Special clothing needs
- Insurance
- Special safety requirements
- Contingency plans
- Marketing and PR
- Communications

The Meeting

Meeting room checks

For a Congress the event will center on the meeting rooms. Therefore, you need to subject all your meeting rooms to close scrutiny.

First, check their location within the venue for:

- Independent access (direct to concourse or street)
- Cargo access
- Accessibility services

Check for their 'find ability' and proximity to:

- Main entrance and car park
- Registration areas
- Break-out rooms
- Meal areas and kitchens
- Elevators lifts and telephones
- Toilets
- Fresh air

Check the fixtures:

- Décor
- Wall and floor materials (should be sound absorbent, not bright and not 'busy')
- Soundproof partitions
- Independent heating/air conditioning
- Pillars/obstructions
- Room shape and partitions
- Location of doors (and where they lead)
- Fire exits
- Natural light/views
- Chandeliers and mirrors
- Stage area and access
- Light and temperature controls, power and telephone points
- Blackout facilities
- Acoustics
- Ceiling height (for projection purposes)

Check the movables:

- Chairs (comfort factor)
- Tables (size & coverings)
- Table furniture (what is provided)

Managing multi-media and Audio-visual aids

Because multi-media technology is changing so rapidly, anything written will probably be obsolete within 12 months. As far as possible the Congress Planning Committee should be aware of forthcoming developments in the fields of IT, communication and presentation. These will include:

- Registration systems
- Venue-finding software
- Accommodation reservation systems
- Mobile telephony
- Presentation techniques
- Video conferencing
- On-site delegate information systems
- On-site tracking and security systems
- Internet access
- Available computers

Obtain the advice of an IT specialist before proceeding. When purchasing or hiring multi-media support from a professional agency, always shop around as prices are very flexible and equipment varies. Yesterday's systems may be perfectly adequate and at a lower price than today's state of the art equipment.

As the Congress planner you must ensure that nominated members of the organizing committee have a working knowledge of the basic equipment used in AV presentations, including the characteristics and capabilities of:

- Flip chart and stand
- Overhead projector
- PowerPoint projector (PPP)
- Sound system

Time spent becoming acquainted with these items will be amply repaid. Do not expect visiting speakers to be familiar with every piece of equipment on the market. A technical rehearsal is an absolute necessity.

When setting up and testing projection equipment, microphones etc., check for visibility and audibility in all parts of the room. It is also important to understand the relationship between focal lengths, screen sizes and visibility in the auditorium. Delegates standing at the back of the room should be able to read what is on the screen and hear what is being said.

In many instances the venue will provide and be responsible for your basic AV needs, but the technician on duty can only be in one place at a time, so ensure that you are provided with spares of all the useable components such as pads, pens, bulbs, pointers, cables etc.

Remember to have a preparation room for the speakers so they can run through their presentations and prepare for the lecture.

Much time can be saved if you ask the right questions about AV matters on an early visit to the Congress venue, such as:

- What in-house resources and technical support are provided (and at what cost)?
- What transport and lifting equipment is available (important for the exhibition)?
- Does the venue operate tied contracts with suppliers? If not, who are the best local suppliers?
- When are the earliest and latest times each room is available?
- Can the rooms be accessed at all times?
- Where is the equipment normally stored and what security is in place?
- What is the power supply and where are the power points?
- Is there an extra charge for the use of electricity?
- Is there an extra charge for the use of internet?
- From where are the sound and lighting systems controlled?
- Does the local fire inspector have to check set-ups?
- Do any special local conditions apply?
- Is there an extra charge for poster stands?
- What materials, if any, are prohibited?

Speakers Management

In order to get the best from Congress speakers there are key principles to follow:

- Brief them
- Host them
- Reward them
- Preparation Room

Unless speakers are fully briefed they will not feel committed to the Congress. Do it personally and do it in writing. Communicate regularly. They need to know:

- When, where and for how long, they should speak
- Who or what precedes or follows them
- What they should speak about
- What AV aids are available
- How many, and who are the audience
- What, when and how they will be paid

Your speakers may not know anyone at the Congress, therefore host them as honoured guests and set aside a speakers' lounge or 'Preparation Room'.

Insist on rehearsals and ensure that the speaker feels comfortable with the layout, lighting, etc. Organize lighting and sound to support and enhance the performer.

Always encourage and thank your speakers (publicly and privately).

Obtain audience evaluations and convey them to the speaker soon afterwards.

Do not accept poor presentations and/or badly prepared graphics simply because the speaker is an 'international name'

Marketing

A marketing plan should be one of the earliest schedules you prepare because your promotional activities should keep pace with your planning. Ensure that IFBLS is notified about requirements for marketing that involve IFBLS. Keep in mind that your own members/national participants are your largest market and start early by informing them to recruit participants for the Congress.

To broadcast your message you may enlist all sorts of media:

- Websites
- Social media
- Professional journals
- Trade papers
- Regional press and radio
- The venue
- Related conferences
- Trade shows
- A launch seminar/seminars

Utilize:

- Social media
- Advertisements
- Press Releases
- Announcements
- Mailings
- Faxes and e-mails
- Web site pages (yours and others)
- Your speakers
- Notices and posters
- Press conferences
- Diaries of events

The type and quality of all your printed material is important and should reflect the theme of the Congress. You may require three or four mailings of different brochures containing programs, speaker details, social activities etc.

Remember that pre-registered delegates save you time, trouble and angst on the day, so make your registration forms as user-friendly as possible. Easy online registration is the key.

The Budget

Budgets

It is not possible to list every possible item of expenditure that may be incurred arising out of the hosting of the World Congress. However, a logical approach to the matter of budgets will help foresee most of them.

Essentially there are two types of costs for the World Congress

- Fixed Costs - those items that do not depend on numbers, e.g. marketing, some printing, speakers.
- Variable Costs - those per person items that will reach a variable total, e.g. meals, conference bags.

Irrespective of how the Congress is financed, the principles of budgeting remain the same:

Allocation - it will be helpful to divide potential expenditure under several headings, for example:

- Travel and transport
- Accommodation
- Presentations
- Social and recreational

As necessary, these categories can be further subdivided. They should be entered into a Cash Flow Forecast where costs (and income) can be projected on a month by month basis.

Negotiation - This will provide you with an agreed price for everything.

Monitoring - This should be continuous so that potential overspends are avoided or identified early.

Accounting - This is done not only to satisfy the financial controller and stakeholders, but also to provide a historic base for future Congresses.

Beware of hidden costs. Ask suppliers what extra costs are possible and then budget for them.

A Contingency Budget should be prepared and approved by IFBLS.

Budget Savers

In order to generate income consider some of the following revenue-attracting ideas:

- Seek for local, regional, national or EU grants
- Seek sponsorship
- Sell advertising space in brochures, programs and mailings
- Sell-display space, mementoes
- Maximise the income from the trade exhibition

Overheads can be cut by:

- Being flexible about dates
- Inviting several suppliers to tender
- Asking suppliers for a discount
- Using local resources

Food and Beverages

'F & B' is major item of expenditure, therefore consider ways of cutting costs:

- Limit the numbers of choices
- Buffets may cost less
- Choose dishes that provide bulk
- Sandwiches are better value than canapés
- Choose local ingredients
- Cut out dry snacks
- Choose house wines or make participants pay for beverages themselves
- Buy tea/coffee by the urn
- Give the Banqueting Manager a budget

Final Thoughts

Some things to remember

- **Rooming lists.** Delegates can be sensitive about their hotel and the quality of their room in relation to others.
- **Multiculturalism.** Take time to discover the requirements and customs of delegates from other cultures and, in association with the venue, provide for them.
- **Disabilities.** Ascertain the needs of any delegates requiring accommodation and make the necessary arrangements.
- **Taxes and service charges.** Don't be caught out by unexpected VAT, GST, and/or service charges. Discuss these with the suppliers before the Congress.
- **Insurance.** You can insure against most unforeseen eventualities such as a speaker 'no show', but not for a shortage of delegates. Planning well in advance, and the contingency budget can help protect the Host.
- **The environment.** Expect good environmental practice. Speak to the venue about its 'green policies'.
- **Website.** It should be easy to access and use the Congress website, including paying the Congress fee.
- **Delegate familiarization.** Your delegates will appreciate the Congress more if they know what to expect. A pre-arrival briefing on customs and traditions, plus guidance on where to go and what to see in the locality will be welcomed.
- **Emergencies.** Always assume that something may go wrong. Prepare contingency plans.

Afterwards

The Congress is not over for the organizer, even when it is. There will be many loose ends to tie up and someone else will be organizing the Congress in two years' time, so:

Analyze

- Achievement of aim, goals and objectives
- The accounts
- Delegate evaluations
- Stake-holder evaluations
- Your teams' opinion

- High and low points
- Budgets: forecast v actual
- Everyone's return on investment

Distribute

- Payments to suppliers
- Payment to IFBLS
- Photography
- 'Thank you' letters
- Press releases
- An 'Event Report'

Reward

- Acknowledge the venue staff for a job well done
- Your team
- Yourself (take a holiday)

Your 'Event Report' might contain

- Amended 'Event Profile'
- Description of the venue and how it worked
- Attendance statistics, including accommodation, take-up, function attendance, delegate payment patterns
- Session attendance
- List of suppliers
- List of sponsors
- Budget analysis
- Cash flow analysis
- Summary of achievements
- Recommendations for the future

A very final thought

When establishing your budget and setting likely targets for income and expenditure, remember the following:

- ✓ When calculating income, be conservative.
- ✓ When calculating expenditure round up the likely outgoings. In this way you have a better chance of breaking even.

To paraphrase the author Charles Dickens:

Income € 100, Expenditure € 101 result = Misery
 Income € 100, Expenditure € 99 result = Happiness

Congress Bid Questions

1. How will the Congress be promoted?
2. What are your relationships and history within the industry in your country?
3. What are your contingency plans if there is a lack of sponsorship?
4. How robust is your association to take on this event? What is your relationship with your association?
5. How do you propose to manage the Chairs and Committees? How will their work be monitored?
6. How would you ensure you can deliver a good Scientific Program?
7. What are the advantages of having the Congress in your location?
8. How many other Conferences/Congresses have you done?
9. Did you make money or break even?
10. What is your track record with previous Conferences/Congresses with attendance?
11. How many local delegates are likely to attend?
12. How do you plan to secure enough volunteers?
13. Will you use a PCO? What are their references?
14. How will Biomedical Scientists participate in the Scientific Program?
15. What is the Congress theme?
16. How will you keep IFBLS updated and involved in the progress of Congress planning?