



ICCA Intelligence

International association meetings:
bidding and decision-making



International association meetings: bidding and decision-making

A comprehensive set of guidelines and check-lists created to help international association executives evaluate and improve the methodology they use to decide on future destinations for their international meetings.

1. Introduction	03
2. Decision-making processes	04
3. Decision-makers & decision-influencers	08
4. Decision-making criteria	09
4.1 Logistical criteria	10
4.2 Financial criteria	13
4.3 Internal association objectives	15
4.4 Political/emotional criteria	16
5. Bid documents & proposal documents	18
6. Models for working with suppliers	19
7. Case studies, hyperlinks & further information	21
8. Acknowledgements	23

Martin Sirk
Chief Executive Officer
ICCA

Document first published January 2009.

The annual congress or convention of an international association plays a massively significant role in the life of that organisation: it is typically the only time when a large proportion of the members of the association physically gather together, the only time when the association is at the front of the minds of those individuals for an extended period, the only time when the association attains a concrete form and when its unique culture can be directly experienced.

For many associations it is also a source of vital revenue that supports other less lucrative activities, the channel for positive PR and for membership growth, and a tremendous opportunity to launch new initiatives and obtain immediate feedback. And of course, for the vast majority of associations it is also a legal necessity. For all these reasons, associations need to be sure that their decision-making processes match up with their needs and objectives.

Each association has evolved a unique decision-making methodology with regard to its major events, often over many years. A few may occasionally have called upon professional advice to update their process or to identify new important factors to take into consideration, but for the most part they have simply created their own model based on trial and error, collective experience, and the cultural practices of their organisation. There are no textbooks on Decision-making for International Association Congresses, there has been no comprehensive academic study of the options that are available, and no online resources exist for easy reference (at least until now!).

This publication has been produced by ICCA to expose the international association community to the rich variety of decision-making models and the factors that influence decision-making. It is designed to help associations critically analyse their current model, to easily identify and rectify problems and unwanted bias, to add improvements, and to help associations communicate congress-related decisions to their members and stakeholders.

The more clearly an association sets out and communicates information about its bidding process (eg on the public areas of its official website), the less likely it is to receive untargeted sales approaches from suppliers (eg mass mailings, brochures) and the more likely it is to receive intelligently thought-through proposals which will enhance the quality of the meeting.

This document will become a critical element in training courses which ICCA designs to further educate ICCA members, the leading suppliers in the meetings industry, to better meet all the needs of international associations, to gain a deeper understanding of their clients' objectives, and to ask the right questions when bidding for international events.

Ideas on how to use this document:

- Carry out a detailed analysis of your overall bidding process to judge its effectiveness in meeting association objectives.
- Check if your written process and rules correspond with what happens in practice, identify any anomalies, rewrite to improve clarity.
- Update and improve your bid manual or RFP document ("request for proposal") in order to receive the strongest possible selection of bids.
- Work out what information to make publicly available in order to reduce unwanted "cold call" sales approaches by suppliers.
- Use the ICCA analysis in Board papers when proposing or discussing changes to your procedures with your volunteer leaders.
- Use the ICCA analysis to enable rational debate to take place within the association on the many non-rational factors that influence decision-making.
- Look for good practical ideas that can easily be incorporated into your model. Identify case studies of associations with similar requirements to your own and make contact with those associations to share knowledge and ideas.
- Consider new ways of working with suppliers and intermediaries, and identify new sources of advice and information.

2. Decision-making processes

Stages along the decision-making path

Decision-making for major international association meetings can be extremely complex and frequently takes place over a protracted period of months or even years. Formal, published elements of the process may be extended because of informal negotiations, additional inspection visits, and the involvement of consultants and stakeholders.

Even after a decision is made, typical lead-times between when the decision is finally announced to members and when the event actually takes place can be anywhere from twelve months to 12 years, with announcements two to four years in advance being the norm.

Most international associations have an internal timetable for their process, but only a few currently publish the key deadlines on their websites. This is critical information for all parties involved in putting together a formal bid or proposal, and associations can avoid much unnecessary communication from suppliers by publishing the information prominently on their website alongside other congress related information.

Here is an example of a step-by-step pathway. Some associations may have additional stages in their process, whilst others will have shorter and less complex processes.

- Call for proposals/next "Open Year" communicated.
- Interest expressed (by either members or suppliers, depending on whether local members are required to be the formal bidders).
- Evaluate if bidders qualify to make a bid.
- Bid manual/guidelines/rules made available to interested parties.
- Bids created by local members/suppliers.
- Bids submitted.
- Site inspections (many associations conduct the shortlisting stage without visiting all candidates)
- First round evaluations by association staff, volunteer leaders or consultants/contractors.
- Shortlist decided and announced.
- Detailed site inspections and negotiations.
- Revised bids submitted.
- Formal bid presentation.
- Final shortlist or final selection.
- Negotiations.
- Decision made.
- Decision announced.
- Feedback to losing bidders.
- Draw up and sign contract or letter of agreement.

Alternative approaches may be taken if the association has an arrangement with a "core PCO" company which is given delegated responsibility for advising on potential destinations and bids, or if there is a highly centralised decision-making process, or if the needs of the association are so specialised that there is only a small potential list of potential destinations or venues.

Your banner here!

Call for proposal/initiating the bid

A key factor in the bidding process is whether or not proposals or bids are initiated and/or primarily driven centrally by the association's head office or by members of the association; in other words whether the association works through local members or Chapters of the association, through professional intermediaries, with destination coordinators such as city CVB's, or direct with individual suppliers. The balance of central and local involvement and influence varies enormously on a case by case basis, and these often interact with each other adding further complexity.

The most common options are set out below, showing which are associated with centrally-driven decision-making, and which follow more traditional bidding models. At present ICCA estimates that approximately two-thirds of major international association meetings involve some form of traditional bid involving local members, but that the proportion of more centralised processes has been growing steadily for many years.

Centrally-driven decision-making (requires little or no local member action):

- Individual member approached and invited to submit non-competitive proposal (eg if it is part of the process that the current or future President is always invited to host the congress).
- Association directly contacts suppliers (eg venues, hotels, AV) in specific destination(s), asking for proposals for their services.
- Association commissions PCO to contact destinations/suppliers and to draw up shortlist of proposals, either in a single country, or (if a "core PCO") a wider region of the world.
- Association directly contacts specific destination representatives to bid, with little or no local member input.
- Association sends out general invitation for any qualifying destinations to bid, with little or no local member input.

Traditional bidding (requires local member action):

- Selected group of members approached and invited to bid.
- General invitation to bid sent out to all members.
- Bids originating with local members, pitching for any future open year whether or not these are announced formally.

Site inspections

There are different types of site inspection, ranging from very informal evaluations of the general suitability and appeal of a destination, through to rigorous evaluations matched to detailed bid decision-making criteria. Sometimes the inspections are undertaken by internal technical specialists or outside consultants or partners, on other occasions a volunteer leader or committee will attend, and in some models the inspections are undertaken by association staff (usually CEO and/or specialist meetings department personnel).

- Are there clear rules for conducting the site inspection.
- Is there a set timetable.
- Who is allowed to plan and attend the site inspection (both from the side of the decision maker and the bidder).
- Who covers the costs.
- What is the policy regarding hospitality and gifts to inspectors.
- What feedback is provided, by whom, and by when.

Your banner here!

Shortlisting

Most associations include a shortlisting stage of their decision-making, since it can be extremely expensive and time-consuming to evaluate large numbers of bids in great detail, both for the association and for the candidates. This is the stage where PCO's frequently play a role, evaluating which destinations meet the key logistical and financial factors that are important. Associations with full scale event management departments typically use their internal expert resources as an alternative to PCO's. In most associations the Volunteer Leaders validate the recommendations of the shortlisting technical experts, rather than undertaking the shortlisting for themselves.

- Are there clear rules for the shortlisting process.
- Is there a clear scoring process.
- Who recommends; who decides.
- Is there a fixed or minimum/maximum number of places for finalists.
- In what way, if any, can shortlisted candidates revise their initial bid in the next phase of the process.

Bid presentations

In the vast majority of models, at some stage the bidders make a formal presentation to the decision-making body. In some models the presentations are made by members only, in others members partner with suppliers, and in others (rarely) the suppliers present on their own. Some associations have detailed rules about how the presentation needs to be made, others have a far more ad hoc approach.

The presentation stage is when bidders have the biggest opportunity to influence decision-makers in an emotional way, which can play a big role in how individuals cast their votes. This is when factors such as depth of commitment, enthusiasm and empathy with the association's internal objectives can offset financial or logistical disadvantages.

Associations should consider the following issues when setting or evaluating current rules for how presentations are conducted.

- Who is allowed to present (eg can suppliers join members, can business leaders, entertainers or politicians participate).
- Maximum number of presenters.
- Maximum time allowed, and what happens if presentation overruns.
- How is the order of presentations decided.
- What formats and technology are permitted.
- Can presenters bring their own equipment.
- Do presenters have to cover specific topics.
- Presentation room set-up required.
- Presentation preparation time for candidates and availability of preparation room(s).
- Can decision-makers ask questions during or after presentations.
- Must all candidates be asked the same set of questions.
- Can presenters include giveaways or food/beverage as part of their presentation.
- Is there a formal scoring methodology for decision-makers to evaluate the presentation.

Your banner here!

The actual decision

Reaching the actual decision also involves a number of different options and issues.

- Is decision made by consensus or is there a formula for calculating and aggregating the individual views of each decision-maker.
- Rules for conflict of interest (ie under what, if any, circumstances should a decision-maker not actually vote).
- Rules for dealing with tied decisions (Presidential casting vote, re-runs, etc).
- Rules for counting votes to determine winner (eg highest number of first votes; simple majority; multiple rounds; elimination of lowest scoring candidate; scores for different aspects of the bid; etc).
- Are written submissions and presentations voted on separately, or is there one vote only on the overall bid.
- Who knows the results and when.
- Independent auditing of results (especially important if decision is made by large groups such as General Assembly or online survey of all members).
- Confidentiality issues (eg is voting confidential; are scores released outside the decision-making group; are candidates allowed to know how individual decision-makers voted).

Winners and losers

Most associations are highly competent at announcing and celebrating the winning destination, members and bid. Little attention is usually given to the losing finalists. Given the long-term investment of time, money and emotion that is needed to pull together a detailed proposal to host a big international association meeting, association members who submit unsuccessful bids can frequently feel extreme disappointment and dissatisfaction with the association if their efforts are not recognised and appreciated.

ICCA has over recent years invested far more effort in looking after the interests of unsuccessful contenders for our own Congress, and strongly recommends all associations to re-evaluate how they handle this often overlooked aspect of the decision-making process, taking into account the following potential actions.

- Provide detailed, constructive feedback on losing bids as quickly as possible.
- Offer encouragement to bid again in the future if appropriate.
- Ensure announcements of winners are not made in a forum where unsuccessful candidates could be embarrassed or "lose face" (eg avoid the beginning of a Congress, where unsuccessful bidders then face the prospect of many days alongside their peers as "losers" of the bid).
- Ensure volunteer leaders and/or senior association staff spend time with leaders of unsuccessful bids.
- Publicly praise the efforts and professionalism of all candidates.

Your banner here!

3. Decision-makers & decision-influencers

The decision-makers vary enormously from association to association, with big implications for the overall shape of the decision-making process, and also for the relative importance of different decision-influencing factors. There are also a wide range of both formal and informal decision-influencers who can play a significant role in the process.

Decision-makers

- Single volunteer leader (eg President; Chairman).
- Single association executive (eg CEO; Secretary General).
- Full Board of Directors.
- Executive Board.
- Congress Committee (either a formal grouping or set up ad hoc to make a particular decision).
- Representatives of association sub-groups (or in the case of a federation, the constituent organisations' nominated representatives).
- National representatives.
- Official delegates at General Assembly.
- All members (eg via online referendum)

Decision-influencers

(Includes all decision-makers plus the following)

- Hired consultants.
- Core PCO (A PCO company hired to organise the association's meeting function over a multi-year period).
- Association Management Company.
- Sponsors.
- Business partners.
- Association staff (especially meetings dept).
- Past members of Board of Directors.
- Members who have recently hosted the association meeting.
- Respected senior figures related to the association.
- Association leaders from other international associations with similar size/profile of events (many association executives trust the views and experience of their peers with regard to recently used destinations/venues).
- Politicians.
- Celebrities.
- News media (negative stories especially relating to security issues can have a big influence).

Your banner here!

These lists are unlikely to include every single potentially relevant decision-making criterion for every association, and different associations will also find some of these factors irrelevant to their individual needs, but together they make up a comprehensive check-list for associations to avoid omitting important issues in their guidance to bidding members or suppliers.

- 4.1 Logistical criteria
- 4.2 Financial criteria
- 4.3 Internal association objectives
- 4.4 Political/emotional criteria

Your banner here!

4.1 Logistical criteria

Logistical criteria typically determine the minimum requirements that would enable a destination to successfully host the event, and can be used to analyse whether a destination should be included in the first “long list” of potential candidates.

Association executives can select whichever of the below logistical factors are most important for their event (based on both current needs and anticipated future needs for the year when a bid is being considered), add in appropriate figures (eg the minimum number of breakout rooms of a certain capacity), and include this under a list of “minimum requirements”.

Associations vary in the range of logistical services which are delivered using in-house staff and those which are provided by outside suppliers. Those which have large and sophisticated in-house meeting planning departments will need far fewer externally provided logistical services.

Date/timing related factors

- Check destination fits with association’s rotation pattern.
- Set out ideal or acceptable dates and patterns of days of the week, and obtain confirmation of availability.
- Provide data on unacceptable dates (eg religious holidays) and patterns of days of the week.
- Provide data on international events in related field(s) whose dates must not be clashed with.
- Confirm no clash with major local events in destination that could affect important aspects of the meeting.
- Confirm that new facilities under construction will be guaranteed to be open and operational and no major disruptive construction is planned to coincide with the meeting dates.

International accessibility

- Air routes serving destination (with the option of matching these to home locations of delegates).
- Potential airlift (flights or seats available per day) on key routes.
- Is the destination a major hub or will most delegates need to take connecting flights.
- Potential bottlenecks.
- Plans for future airport expansion or route network growth.
- Evidence of past clients with similar size events and delegate travel profiles.
- International rail connections.
- Visa policy – will delegates from all countries with association members be able to attend; is assistance available to facilitate the visa process (eg official letters of invitation).
- Quality of information available to delegates on applying for visas.

Your banner here!

Local accessibility

- Distance from airport and rail terminal to key hotels and venues.
- Travel times at rush hour and off-peak.
- Efficiency of airport immigration/customs/security for delegate access.
- Efficiency/security of customs clearance for congress materials (eg technical equipment, exhibitor samples, etc).
- Opportunities for accelerated airport procedures and welcome desks.
- Distance between main venue, hotels, and off-site social venues.
- Information on walking and shuttle-bus options.
- Public transport information and options (eg delegate passes).
- Disabled-friendly infrastructure in city.

Main venue

(Specify which of these are based on historical/current needs; minimum/ideal needs; projected future needs; etc)

- Specify if residential or non-residential venue is preferred or required.
- Capacity and size of plenary room required, plus any other features (eg if fixed-seat auditorium is required or desired).
- Number of breakout rooms, broken down by size.
- Space for exhibitions, networking, posters, etc.
- Space for catering.
- Food/coffee outlets available onsite.
- Options and speed of turnaround for changes of format (eg moving partition walls; demountable seating systems).
- Plans showing relative layout of all areas; information on walking times.
- Year venue built and dates when last modernised or extended.
- Quality/maintenance/modernity of venue.
- Evidence of past clients with similar size and event profile.
- Disabled friendly layout and facilities.
- WiFi infrastructure available.
- Simultaneous interpretation infrastructure built in.
- Layout planning software available.
- Electronic signage available.
- Environmental features or accreditations.
- Sufficient furniture for all meeting and networking requirements.
- List all in-house support services and specify if tied or optional.
- In-house facilities to receive shipments of congress materials and/or duty free zone to avoid complex customs paperwork.
- Solo use of venue or multiple clients at same time.
- Public access policy during private events.
- In-house security.
- Dates held; policy regarding provisional bookings.
- Policy regarding availability of build-up and breakdown days.

Delegate accommodation

- Total bedrooms within specified distances, broken down by hotel type.
- Total achievable room-blocks, broken down by hotel type and distance.
- Hotels room-blocks already secured provisionally; policy regarding confirmation of contracts.
- List of potential HQ hotels based on specified criteria (eg size, star rating, size of networking lounge, ancillary meeting space, etc).
- Proposed contractual relationship between hotels and association, listing all intermediaries and involved parties (eg official booking agency).

Your banner here!

Local suppliers

(Specify basis on which companies under any of these headings are recommended – examples only, many more possible options).

- Professional congress organising companies (PCOs).
- Destination management companies (DMCs).
- Security personnel providers.
- Volunteer & temporary staff coordinators.
- AV/production/Simultaneous interpretation.
- Exhibition equipment/signage/posters.
- VAT/tax consultants.

Your banner here!

4.2 Financial criteria

The large annual congress represents a tremendous financial opportunity but also great risk for an international association and/or its local affiliates. Clearly specifying the financial objectives of the congress, both for the organisation and for the attending delegates, will help avoid misunderstandings and uncertainty on critical financial issues. Bid manuals need to be particularly clear about what financial information is required in bid documents and other proposals, in order to accurately compare the risks and potential financial benefits of different offers.

Financial responsibility & objectives

- Who is the contracting party with suppliers (eg main association; local chapter/ members; third party agency).
- Who is responsible for each aspect of revenue generation and marketing – registration fees; sponsorship; exhibition.
- Who retains any surplus, or how is this split.
- Who is responsible for any losses, or how are these split.
- Who draws up and controls budget(s).
- Is there a standard format for the budgets; are budgets from past events available.
- How will the event be treated for VAT purposes.
- What customs charges (if any) are made for temporary imports and promotional materials, and who is liable to pay these.
- Who is responsible for any currency fluctuation risks.
- Does association require financial guarantees from bidders (local members or suppliers or governments).
- Does the event have a target level of surplus, and how critical is this in evaluating proposals.
- Who is responsible for auditing event finances.
- Specify which items are the financial responsibility of the organisers, and which are the individual responsibility of delegates.
- Insurance costs and coverage – all stakeholders and suppliers (ensure full coverage with minimal duplication).
- Risk- and reward-sharing models. Specify any financial incentives for local hosts and/or suppliers (eg if local hosts raise a target amount of local sponsorship they become entitled to keep a percentage).
- Quality-price analysis & who is responsible for this.

Venue

- Are prices indicative (eg “plus inflation”) or firm for the year of the bid; if indicative, when will firm rates be known.
- Does association require firm prices in bids or is there flexibility.
- Price of venue hire, including set-up and breakdown days.
- Any additional charge for “standard” equipment and furniture: ie spell out precisely what is included in the baseline prices.
- Prices of additional in-house services specified.
- Clarify if commissions are paid and to whom.
- Attrition (reduction in numbers) and cancellation policies.
- Are there any financial incentives (eg for moving to different month, or to different days of the week, or for changing format of event in a way that would reduce revenue costs).
- Accreditations and/or quality standards.

Your banner here!

PCO/DMC

- Does association require full transparent open-book accounting with partners such as PCO's.
- Show detailed breakdown of charges: consultancy services; fixed price items; per delegate handling charges; charges passed on from other suppliers; commissions earned and paid.
- Incentives available for hitting financial targets.
- Policy regarding commissions earned and paid.
- Accreditations and/or quality standards.
- Financial stability of company.

Delegate accommodation

- Hotel prices indicative or firm; if indicative when will firm rates be quoted.
- Attrition and cancellation policies of both association and hotels regarding room blocks.
- HQ hotel financial requirements specified separately.
- Commissions paid to intermediaries.
- Complimentary rooms required by association.
- Upgrades required by association.
- Accreditations and/or quality standards.

Transport

- Price reductions offered by airlines, airline alliances, or rail operators – specify ticket types and duration, and how delegates will access the deals.
- Complimentary tickets for speakers and VIPs.
- Price indicators based on current year, and indication of when firm prices will be available.

Subventions & support

- In-kind or cash subventions from host country, city, or main venue.
- Commissions refunded to association.
- Hosted welcome receptions or dinners.
- Interest-free or low interest loans.
- Delegate boosting marketing materials and support.
- Accurate advice available on VAT and other local or national tax issues facing international events in this destination.
- Value-added benefits (eg free city transport pass for delegates).

Other financial issues

- Identify the financial objectives and role of other stakeholders (eg major sponsors of event or delegates).
- Costs relating to visas.
- Corporate Social Responsibility (eg carbon offsetting; contributions towards local charities or social projects).

Your banner here!

4.3 Internal association objectives

Whilst logistics typically determine which destinations have the capacity to host the association's events, and financial factors play a critical role, the vast majority of international associations have a range of important internal objectives which they have to balance against these pragmatic considerations. These internal objectives relate to the association's Mission and its future capacity to deliver long-term benefits to its members and stakeholders.

Suppliers who invest in research to understand these factors will be in a much stronger position to work in partnership with international associations and to deliver more effective events. Associations which spell out their internal objectives more clearly in bidding guidelines will receive more creative bid proposals and helpful ideas.

Associations may also wish to differentiate between long-term strategic objectives and short-term tactical objectives, to set out the priority order of objectives, and to identify local association chapter objectives distinctly from global association objectives. Setting out relevant examples from previous meetings may also be helpful for future bidders.

(NB – this list does not contain any financial objectives, which are covered in section 4.2; it is understood that financial surpluses from congresses are frequently needed to finance other strategic objectives).

- Rotation pattern – need to be seen in specific parts of the world on a regular basis, or part of a policy requirement.
- Decision linked to Presidency or other holders of key offices.
- Membership growth potential; build chapter network.
- Large local membership already present nearby; strong local chapter.
- Audience for products and programmes offered by association.
- Deliver formal accreditation and qualifications.
- Local demand/desire for the educational content delivered by this event.
- Knowledge transfer to underdeveloped countries/regions.
- Raise PR awareness of association and its key issue(s) with public and/or government.
- Destination suffers from the specific challenge (eg medical, environmental, social) the association exists to address.
- Business opportunities for current members; investment opportunities for members and association itself.
- Strong research/expertise/specialisations in association's key subject area(s) and availability of strong local speakers.
- Important local site inspection opportunities related to the association's field of interest.
- Opportunity to leave strong local legacy impact.
- Opportunity to collaborate with other national or international associations in same or related fields.
- Wish to anticipate/meet the strategic needs of major sponsors/business partners.
- Wish to respond to competition from other associations or private sector events.

Your banner here!

4.4 Political/emotional criteria

These criteria almost never appear in associations' bid manuals or guidelines, but experienced bidders know that their potential impact can be massive. Associations should at least be aware of their existence, knowing that they cannot be eliminated but can be managed by acknowledging which ones are legitimate and which ones run counter to the objectives of the association.

Decisions are made by human beings based not only on factual evidence but also on perceptions, prejudices, and the impact of other individuals' views and group social pressure. Emotional appeal, strongly communicated local commitment, and other non-quantitative factors can actually play a big role in attracting big numbers of delegates and in delivering an event which surpasses delegate expectations, so it is right that they should be considered alongside budgets and capacity issues. The biggest problem is that because they are so infrequently part of the formal process that they can be seen as "illegitimate" decision-making factors and can lead to associations being accused by members or stakeholders of making "wrong" or purely "political" decisions on where meetings are held.

Attractiveness of destination

- Tourist appeal (shopping, attractions, nightlife etc).
- Cultural appeal.
- Link to association's own culture/history.
- Association anniversary (eg return to where association was founded 50 years earlier).
- Link to important major public event (eg Olympics, Expo, Arts Festival).
- Destination anniversary (city or country offers celebrations which will enhance the meeting or boost attendance).
- Association has never before met in the city or region.
- Strength of local team (local members and/or suppliers).
- Brand new venue or "hot" new destination.
- Political/economic stability of destination – perceived low or high risk.
- Environmental factors – could be either an overtly "green bid", or an appeal that holding the meeting will help locals to become more environmentally responsible.
- Climate; extreme weather risks.

Bidder related factors

- Sympathy and/or respect for bidder/destination that has previously bid and lost.
- Support for bidder facing particularly strong challenges (eg countries which were affected by Indian Ocean Tsunami).
- Bidders are very active members of the association (eg regular attendees of previous meetings; sponsors; speakers; etc).
- Popular leader of bid.
- Politically important leader of bid.
- Internationally respected/popular/well known figure backing bid.
- Government support.

Your banner here!

Decision-makers

- Prejudice; out of date knowledge.
- Personal relevant recent knowledge/experience.
- Decisions made for political or personal friendship reasons.
- Lobbying by bidders or influential stakeholders.
- Lobbying within the decision-making body.
- Gift giving (very important to have clear policy on this).

Bid presentations

- Emotional appeals by individuals.
- Use of powerful images and/or sophisticated presentation techniques to build empathy and appeal.
- Clearly articulated “story” explaining why the bidder should be selected.
- Professionalism/confidence with which bid presentation is made.
- Ability of bidders to answer questions from decision-makers.

Your banner here!

5. Bid documents & proposal documents

Bid documents and proposal documents should contain all the necessary information for an association to be able to analyse how well these match up to each of its logistical, financial and internal objectives. The contents need to be organised in such a way that comparisons can easily be made between alternative bids. In practice, this is a less common situation than ought to be the case, often because the guidelines on how to present bids or proposals are frequently lacking in clarity and completeness, but also because of the lack of experience and expertise of the individuals who pull together the contents of the bid (in some instances, the member of an association who leads a bid only does this once in their lifetime). In addition, many bidders do not realise how to obtain useful support and advice from meetings industry suppliers such as PCO's and convention bureaux.

Every association should have a comprehensive bid manual available to bidders who wish to host one of the association's major events, either online or available on request. An example is shown in Section 7 with ICCA's own Bid Manual, which ICCA produced to assist bidders for its 2012 Congress. ICCA updates this annually to ensure the closest possible match between proposals and our anticipated future requirements and objectives. A bid manual should provide guidance on the following areas:

- Minimum requirements to qualify as a bidder.
- Timetable for bidding process; important deadlines.
- History of the event (if part of a series of events).
- Objectives of the event.
- Dates for meeting (ideal and potentially acceptable).
- Decision-making key factors.
- Decision-making process (including who decides, where and when).
- Format required in bid document.
- Factual information that must be covered in bid document.
- Length of bid document and treatment of additional information (appendices, brochures, etc).
- Examples of how information should be laid out (eg sample budgets).

More and more associations are moving to totally online bid documents, rather than requiring printed materials. This is both cost-effective and increases flexibility, enabling bids to be easily updated following negotiations or feedback during the extended bidding process. This also raises the prospect of far more interactive bidding processes in future years.

Your banner here!

6. Models for working with suppliers

All of the supplier types described below are represented within ICCA's global membership of over 850 companies and organisations in more than 80 countries worldwide. Details can be found on the ICCA website, www.iccaworld.com.

The extent to which any of these suppliers get involved in the bidding process depends upon the decision-making model used by the association, and the association's level of in-house knowledge and expertise. All will tailor their advice and level of services offered to the specific needs of individual associations.

Meetings management company

PCO (Professional Congress Organising company)

DMC (Destination Management company)

A growing number of PCO's work with international associations as outsourced organisers of the association's meetings programme around the world or within a particular region, with a multi-year contract. This type of PCO is known within the meetings industry as a "core PCO". Some Association Management Companies offer similar support as part of their portfolio of services. Services include:

- Strategic advice and consultancy.
- Bid manual & guidelines creation.
- Technical evaluation of destinations and/or bids.
- Organisation of site inspections.
- Shortlisting services.
- Negotiating & contracting with suppliers.
- Budgeting.
- Registration.
- Marketing.
- Content management.
- Speaker management.
- Risk evaluation and management.
- Event organisation.

Local PCO's in a particular country may be used by associations to provide meetings management support once that particular country has been selected for a future meeting, or they may be asked by local members of the association for assistance at the bidding stage, in return for guarantees they will win the contract for organising the event if the bid is successful. Which elements of a PCO's range of services are used will depend upon the in-house expertise of the association. A local PCO will almost never get involved in providing strategic advice; they will be employed for a one-time event only, but their range of services goes beyond that of a DMC (see below).

Local PCO's are often willing to provide advice and direct support to local association members in making the actual bid.

Your banner here!

DMC's are locally expert meeting management companies specialising in event logistics, including ground transportation, negotiation with hotels and meeting venues, offsite catering function selection and organisation, and coordination of a vast range of suppliers from exhibition contractors to floral decorators to simultaneous interpreters. They often also have access to a ready supply of temporary staff both skilled and unskilled. They are often selected as local partners by associations which already have strong internal meetings departments, and by core PCO's with no local branch office in the country where the meeting will take place.

Association relationships with PCO's and DMC's are conducted on a commercial basis, which is not the case for the next category of supplier.

Destination marketing organisation

Convention bureau or convention & visitor bureau (CVB).

Local tourist board.

National tourist organisation (NTO).

DMO's are typically not-for-profit organisations, either fully public sector (especially at the national level) or a public-private sector partnership of some kind. Their role is to promote and secure business for their destination rather than to earn a bottom line profit, and most offer a range of free, impartial services to international associations which have the potential to bring business to their destination.

These organisations can provide impartial advice on other suppliers of meetings related services, can coordinate citywide responses for bids for large scale events, and provide a large range of information and marketing materials.

They often assist local representatives of associations to create the detailed bid document, and can provide the promotional films and brochures that provide colour and excitement to the bid, as well as useful factual information. Many CVB's are also willing to make or support local association members in presenting the bid itself.

Many of the most active city CVB's operate "Ambassador Programmes" to identify senior local members of international associations, and encourage them to bid for future Open Years for their associations' meetings.

ICCA has produced a detailed document for international associations on the subject of working with this type of organisation which can be found in the "ICCA Intelligence" section of the ICCA website.

www.iccaworld.com/nlps

Venue

Congress & convention centre

Specialist meeting hotel

Many large venues can provide a wide range of support for international associations at the bidding stage, in a similar manner to CVB's (and in cities which don't have an active CVB, a large centre may in practice act as the DMO for that destination). Often they can act as a central point of coordination for other local suppliers.

Your banner here!

7. Case studies, hyperlinks & further information

ICCA Congress case study

[www.iccaworld.com/cnt/files/ICCA Intelligence Vol. 12/ICCA-Congress-Bid-Manual-2012.pdf](http://www.iccaworld.com/cnt/files/ICCA%20Intelligence%20Vol.%2012/ICCA-Congress-Bid-Manual-2012.pdf)

Here you will find the detailed bid manual produced by ICCA as guidance for members wishing to bid for our 2012 Congress, the decision for which is being taken in 2009.

ICCA's decision-making process has undergone some radical changes in the last five years, as we have become aware of faults with the current methodology and of useful ideas from friends within the international association community. We are happy for any other international association to make use of the formats and ideas we are using.

International association case studies and hyperlinks

Here is a selection of international associations whose detailed bid manuals and/or bid procedures have been published on their websites.

- International Association of School Librarianship -IASL-
www.iasl-online.org/events/conf/confmanual1.html
- International Federation of Societies for Surgery of the Hand -IFSSH-
www.ifssh.info/guidelines.html
- International Society for Education Through Art -INSEA-
www.insea.org/docs/CongressRules.pdf
- International Pharmaceutical Congress Advisory Association - IPCAA -
www.ipcaa.org/assets/Code_Conduct_and_Healthcare_Congress_Guidelines.pdf
- International Psycho-Oncology Society -IPOS-
www.ipos-society.org/professionals/meetings-ed/IPOS.wc.ExpressionOfInterest-CongressHost.pdf
- International Society for Aging and Physical Activity -ISAPA-
www.isapa.org/ISAPA_Congress/Hosting_Guidelines.cfm
- International Speech Communication Association -ISCA-
www.isca-speech.org/guidelinesInterspeech.html
- Inter-Society for the Electronic Arts -ISEA-
www.isea-web.org/eng/sympos_guide.html
- International Society for Rock Mechanics -ISRM-
www.isrm.net/fotos/gca/1185236376bylaw4_20070504.pdf
- International Society for the Study of Xenobiotics -ISSX-
www.issx.org/files/public/Meeting_Guidelines_1_2_08.pdf
- International Transactional Analysis Association -ITAA-
www.ita-net.org/itaa/ConferenceManual.pdf
- International Union of Biochemistry and Molecular Biology -IUBMB-
www.iubmb.org/index.php?id=72
- International Union of Toxicology -IUTOX-
www.iutox.org/SOP_ICT_CTDC.doc
- International World Wide Web Conference Committee -IW3C2-
www.iw3c2.org/conferences/host
- International Laser Display Association -ILDA-
www.laserist.org/hostingtips/SoYouWantToHostILDA.pdf
- Imago Mundi Ltd.
www.maphistory.info/ichcorganising.pdf
- International Mathematical Union -IMU-
www.mathunion.org/Publications/CircularLetters/2008-02.pdf

Your banner here!

- European Society for Neurochemistry -ESN-
www.neurochemsoc.eu/images/ESN_MEETINGS_GUIDELINES1_1.DOC
- International Association of Applied Psychology -IAAP-
www.new.iaapsy.org/uploads/documents/manualICAPrevised2005.pdf
- IEEE Oceanic Engineering Society -IEEE OES-
www.oceanicengineering.org/docs/Proposal-Guide.pdf
- International Association of Penal Law -AIDP-
www.penal.org/new/activites.php?Doc_zone=ACTIVITE&langage=gb&ID_doc=140
- European Consumer Safety Association -ECOSA-
www.phs.ki.se/csp/pdf/Conferences/Guidelines_hosting_conferences_safecomm_2007a.pdf
- Society for Industrial and Applied Mathematics -SIAM-
www.siam.org/meetings/guidelines/org_guide.php
- International Society of Orthopaedic Surgery and Traumatology -SICOT-
www.sicot.org/resources/Image/downloads/Guidelines%20TWC.pdf
- International Biometric Society -IBS-
www.tibs.org/WorkArea/showcontent.aspx?id=108

Additional useful information

Working with International Suppliers

This guide will serve as practical educational guide for meeting planners on how to deal effectively with international suppliers.

The following topics are covered in this guide:

- *Working with Convention Bureaux*
Gives a better understanding of what services convention bureaux provide and how they are organised.
- *Working with Airlines*
Ideas and advice on how to deal effectively with the airline industry.
- *Negotiating with hotels*
Ideas and advice to obtain a better understanding of the hotel business objectives that drive hotel negotiating positions.

www.iccaworld.com/nlps

Your banner here!

8. Acknowledgements

The first stage interviews with suppliers and international association executives were carried out, and the framework for the checklists was drawn up by ICCA's 2008 intern Anni Moyal as part of her degree thesis. We would like to thank Anni for her excellent work on this project.

Approximately 180 ICCA members (suppliers from all sectors of the meetings industry and all regions of the world) then added significant details to this framework during a working session at the 2008 ICCA Congress in Victoria, Canada. Drawing on their extensive collective experience of bidding either directly or alongside local association representatives, they helped to create a genuinely comprehensive resource for the international association community.

Finally we would like to acknowledge all the future contributors to the shape and contents of this document. It has been designed from the outset to be constantly updated as new information is received from association executives and suppliers, as new decision-making processes and models come into existence, and as new decision-making factors rise in importance. This is a constantly evolving field, and one in which ICCA is committed to remaining at the forefront.

Martin Sirk
CEO
ICCA

Your banner here!



Head Office

Toren A, De Entree 57, 1101 BH Amsterdam, The Netherlands

Automated phone menu +31 20 398 1919 Fax +31 20 699 0781 Email icca@icca.nl Website www.iccaworld.com

Direct phone numbers:

Events Dept. +31 20 398 1910 Marketing Dept. +31 20 398 1963 Membership Dept. +31 20 398 1904

ICCA Asia Pacific

Suite 12.05, Amcorp Tower, Amcorp Trade Centre, 18 Persiaran Barat, 46050 Petaling Jaya, Selangor, Malaysia

Phone +60 3 7955 3343 Fax +60 3 7955 3348 Email asiapacific@icca.nl

ICCA Latin America

Plaza Independencia 759 Oficina 763, UY 11100 Montevideo, Uruguay

Phone +598 2 901 1807 Fax +598 2 901 1807 Email latino@icca.nl

ICCA North America

Box 6833, Freehold, New Jersey 07728-6833, U.S.A.

Phone +1 732 851 6603 Fax +1 732 851 6584 Email n.america@icca.nl