

Schedule of services provided to Society for Molecular Biology & Evolution

Schedule

The Professional Conference Organizer (PCO) will adhere to SMBE conference guidelines as detailed on the SMBE website - <http://www.smbe.org/smbe/MEETINGS/ConferenceGuidelines.aspx> - dated April 2018.

Any changes to the guidelines must be agreed by the PCO before they are added to the Schedule of Service

1. FINANCIAL SET UP AND ADMINISTRATION

The PCO will:

Secretarial/Administration

- Act as the financial vehicle for the Conference

Accounting

- maintain Conference accounts
- check all invoices for which the PCO is responsible
- maintain separate and accurate records of income and expenditure
- prepare a statement of account

Banking

- Use the PCO's bank account to administer the conference funds and report at agreed time periods to the client

Expenditure Control

- Seek approval from the Principal in writing for payments of all third party invoices prior to payment

Invoicing Procedure

- The PCO will be responsible for preparing and sending out invoices for delegate registration/accommodation fees and sponsorship monies on behalf of the [Insert name of organisation]. All monies will be paid directly into the PCO's bank account

Conference Budget

- research and determine realistic estimates for all Conference costs
- establish a Conference budget in consultation with the Principals
- advise on appropriate registration fees and categories
- distribute copies of the budget by email and/or hard copy to the Principals
- maintain the Conference budget by monitoring actual income and expenditure for which the PCO is responsible.

Schedule of services provided to Society for Molecular Biology & Evolution

2. PROJECT MANAGEMENT AND GENERAL ADMINISTRATION

Critical Path

- advise on appropriate time-scales required to complete organisational tasks
- advise on appropriate resources required to complete organisational tasks
- prepare an activity schedule
- establish deadline dates and highlight those which are critical
- monitor progress against critical deadlines
- review and update the activity schedule, as required
- report on progress against critical deadlines at Principals meetings.

Principals Meetings

- attend Principals meetings, pertaining to the areas for which the PCO is responsible
- provide progress report/s and meeting notes, as appropriate.

General Administration

- provide a central point of administration and communication
- establish an e-mail address for the Conference
- respond to general enquiries by email, telephone or fax
- provide office services, (operational costs are charged monthly and in accordance with the approved budget)
- manage a Conference filing system, (Principals can retain copies of selected correspondence, as required.)

Schedule of services provided to Society for Molecular Biology & Evolution

3. ADMINISTRATION OF REGISTRATION

Pre-Registration Announcements

- receive and process all hard copy returns to First Announcement distributed prior to the Invitation to Register
- set-up a tailor-made database to record returns to the First Announcement
- input all names and contact details into the database
- respond to enquiries relating to Announcements by e-mail, telephone or fax
- ensure that those who submit a return are sent any follow-up Announcements and the Invitation to Register
- prepare the following standard reports for distribution to the Principals, as required:
 - total number of returns sorted by surname
 - total number of returns sorted by country
- where required agree set-up costs to produce additional reports or data capture tailored to the needs of the Principals.

On-Line Pre-Registration Announcements

- provide a URL for an on-line response form so that a link can be established from the Conference website directly to the on-line response form
- design and develop a standard on-line response form
- administer on-line responses to the First Announcement
- send an automated electronic response to delegates who register their interest on-line
- ensure that those who register their interest on-line are sent any follow-up Announcements and the Invitation to Register.

Conference Registration

- set-up a tailor-made registration database for the Conference
- receive and process all hard copy registration forms, if required
- input all names and registration details into the database
- respond to on-going registration enquiries by e-mail, telephone or fax
- update and/or amend individual registration details as necessary
- send confirmation of registration and joining instructions to each pre-registered delegate
- handle delegate correspondence for registration and accommodation arrangements
- prepare the following standard reports for distribution to the Principals, as required:
 - total number of registrations sorted by surname
 - total number of registrations sorted by organisation
 - total number of registrations sorted by country
 - total number of registrations sorted by registration number
- where required agree set-up costs to produce additional reports or data capture tailored to the needs of the Principals.

Schedule of services provided to Society for Molecular Biology & Evolution

On-Line Registration

- provide a URL for an on-line registration form so that a link can be established from the Conference website directly to the on-line registration form
- design and develop a standard on-line registration form
- administer on-line registrations
- accept credit card payment, where appropriate
- send an automated electronic confirmation to delegates who register on-line
- provide the facility for delegates to amend their on-line registration once it has been submitted
- provide the facility for delegates to generate a confirmation/invoice, where appropriate
- where required, agree set-up costs to include unique data-capture fields and produce reports additional to those listed above
- Provide an option for delegates to obtain confirmation of registration letters and certificates for Visa purposes during the registration process

Administration of Registration Fees

- process sales invoices to delegates
- record delegate payments
- monitor cheques and or bank transfers sent for as payment for registrations by delegates
- pay in cheques to the PCO's bank account
- where appropriate, process delegate payments by credit card and contact individuals to obtain further information about their credit card details, as required
- prepare the following standard reports for distribution to the Principals, as required:
 - total number of registrations by registration fee category
 - debtors name, organisation, country and outstanding fee
- where required agree set-up costs to produce additional reports or data capture tailored to individual Principals needs
- ensure discount and complimentary registrations are possible within the registration portal

Preparation for going On-Site

- prepare a delegates list sorted by surname, organisation and/or country
- co-ordinate the photocopying of the delegate list
- co-ordinate dietary requirements of delegates
- co-ordinate the production of standard name badges which include delegate name and organisation and/or country
- co-ordinate the over-printing of colour logos onto standard badge sheets, as required
- assemble and sort name badges
- co-ordinate the hire and delivery of equipment for use at registration to include computer(s), printer(s), telephone(s), telephone line(s) fax, photocopier and registration stand(s), as required
- co-ordinate the receipt of other items to be distributed to delegates at the Conference
- co-ordinate the packing/collating of Conference bags/folders, as required
- when, necessary, advise on the requirement to recruit temporary staff to collate and pack Conference bags
- appoint and brief temporary assistants for the Conference, as required.

Schedule of services provided to Society for Molecular Biology & Evolution

On-site Administration of Registration

- ensure the smooth operation of the on-site registration procedure
- set-up a registration desks at the venue, for example, pre-registered delegates, on-site registration, accommodation desks, ticket sales for social events
- co-ordinate the provision and set up of computer(s) and printer(s) for use at registration, as required
- prepare/amend and issue replacement delegate badges at the Conference
- Supply a suitable number of staff to manage the successful delivery of the Conference, numbers to be agreed with the Principals
- co-ordinate temporary assistants during the Conference, as required
- work with the Scientific Committee on defining and co-ordinating volunteer staff during the Conference, as required
- brief venue staff/stewards/committee members, as required.

4. ADMINISTRATION OF ACCOMMODATION

Accommodation Booking Service

- hold room allocations across a range of accommodation providers for Conference delegates
- negotiate and agree room rates with accommodation providers
- obtain, review, advise on and finalise contracts with accommodation providers
- produce and update a master list of all accommodation providers' detailing the number of rooms on hold, type, cost, cut-off date, number of free rooms and details of disabled access and other general information
- provide copy for the accommodation booking form to be reproduced in the Invitation to Register
- process hard copy accommodation booking forms if required
- co-ordinate all elements of the accommodation administration; to include confirmation to delegates, amendment to bookings, cancellations and rooming lists
- agree with the Principals a cut-off date beyond which Conference will not be able to guarantee room rates or availability to the delegates
- where possible continue to book accommodation for delegates beyond the agreed cut off dates
- liaise with the Principals to ensure that all VIPs are given priority regarding choice of accommodation
- implement an agreed procedure of payment for VIPs accommodation, if required
- monitor the accommodation cut off date and release all unsold rooms in consultation with the Principals.

On-Line Accommodation Booking

- administer on-line accommodation bookings as part of the registration process

Schedule of services provided to Society for Molecular Biology & Evolution

5. VENUE AND CATERING

Venue Liaison

- co-ordinate a detailed planning meeting at the venue
- advise on contracts
- agree terms and conditions with the venue on behalf of the Principals
- agree a schedule of deposit payments with the venue on behalf of the Principals
- agree requirements for sign posting at the venue
- liaise with key staff at the venue to ensure the appropriate meeting rooms are selected
- ensure rooms are laid out as required for the programme and make the best use of space.

On-site Management

- liaise with key staff from the venue throughout the Conference to ensure that all contractual agreements are implemented smoothly
- arrange briefing meeting/s with the Principals and key staff from the venue, as required
- supervise and monitor all rooms being used for programme meetings
- co-ordinate the preparation and posting of appropriate signs
 - co-ordinate all security arrangements, as required
 - co-ordinate all stewarding arrangements, as required.

Catering

- agree arrangements for the provision of tea, coffee and options for lunch
- co-ordinate a Principals tasting, if required
- agree location of coffee points and lunches
- supervise all catering arrangements on-site during the Conference
- liaise with the venue prior to and during the Conference regarding expected numbers.

Schedule of services provided to Society for Molecular Biology & Evolution

6. AUDIO VISUAL (A/V), STAGING AND SPEAKER LIAISON

Planning

- co-ordinate site visit(s), as required
- advise on room layouts to provide the best location for A/V and stage equipment
- advise on and, if required, present options for stage set/s and room layout/s
- agree the detailed A/V, staging and technical support requirements at the venue
- establish a budget for the provision of additional A/V and staging equipment not included within the contract
- establish a budget for the provision of additional technical support not included within the contract
- determine the requirement for holding-slides and/or title slides and co-ordinate the production of same
- advise on logistics and set-up
- co-ordinate access to the venue for set-up.

On-site Management

- liaise with key personnel at the venue
- supervise the implementation of A/V and stage set plans at the venue
- monitor the meeting rooms to ensure the satisfactory operation of equipment
- liaise with technicians to ensure that any equipment or presentation problems that may occur on-site are dealt with quickly and smoothly
- co-ordinate the provision of back-up in the event of equipment failure
- brief all speakers on-site using a technician on operation of on-stage equipment
- ensure any temporary assistants are briefed on-site to ensure good communication between the speaker/s and audio-visual technician/s.

Stage Management and Speaker Liaison

- prepare a detailed stage management brief
- agree the stage management brief in advance with the Principals
- circulate copies of the stage management brief, as required
- supervise the implementation of the agreed stage management brief on-site ensuring that key speakers are aware of stage position and running order and that the scheduled programme runs to time
- provide a detailed audio-visual specification, in advance, for speakers and chairmen to complete and return
- liaise closely with all speakers regarding their audio-visual requirements
- where possible obtain speakers presentations in advance of the Conference
- where possible, arrange on-site briefing meetings between speakers and session chairmen
- as required, co-ordinate a speakers' preview area/room/s, order walkie-talkies, arrange for gifts and photography.

Schedule of services provided to Society for Molecular Biology & Evolution

7. PROMOTION AND LITERATURE

Marketing

- in conjunction with the Principals, develop an appropriate marketing strategy
- within the agreed timescales and marketing parameters ensure that the Conference is promoted to the target delegates
- as directed by the Principals, promote the Conference to specified individuals/groups on behalf of the Principals
- prepare diary information and adverts for appropriate professional journals, as required
- as directed by the Principals, arrange for the Conference to be promoted at other Conferences likely to be attended by target delegates
- advise on secondary marketing requirements, as necessary.

Web Developer - Support

- The PCO will take full responsibility for provision and successful operation of the conference website. The PCO will work with the web developer with respect to the needs of sponsors and other conference users.
- In order to retain an SMBE conference brand and keep web and app development costs to a minimum, the PCO will create a template conference website and app which will be updated for each conference destination.
- Each conference website will be kept for two years from its launch date.

Print & Design

- develop and agree the overall print and design strategy
- appoint, manage and regularly liaise with a designer/copywriter/printer to produce the required promotional literature
- as required, coordinate the production of the Conference promotional literature within the agreed budget
- review and update a production schedule for promotional literature,
- working with the designer, develop, present and agree all designs with the Principals prior to production
- make recommendations on the content and focus of each piece of promotional literature
- co-ordinate the receipt of copy for Conference promotional literature, excluding all copy of a technical or specialist nature relating to the programme, speakers biographies and synopsis of presentations
- produce copy covering the areas of the Conference arrangements for which the PCO is responsible for administering
- design tailor-made registration and accommodation booking form/s
- in conjunction with the Principals, check print proofs and co-ordinate amendments.

Distribution and Mailing Lists

- utilise databases of target delegates obtained electronically from the Principals
- work with the Conference to establish a distribution list for the Conference which can continually be updated and developed
- process small scale promotion mailings in-house.
- process larger scale promotion mailings via a specialist handling house.

Schedule of services provided to Society for Molecular Biology & Evolution

Mass E-mail Distribution

- obtain from and agree copy with the Principals suitable to include in an e-mail
- utilise e-mail addresses either collected in the Conference registration database or to be supplied in electronic format by the Principals
- co-ordinate and enable mass e-mails to be sent for marketing and/or information purposes to target delegates or pre-registered delegates.

Event App

- The PCO will create and deliver an event app for each conference
- Amongst other requirements the app will provide access to the scientific programme, app, delegate information, details on sponsors

8. INTERNET ABSTRACT MANAGEMENT AND ADMINISTRATION

Abstract Submission

- the abstract submission web page is exactly reproduced on the web page respecting the criteria defined by the Local Organising Committee (such as number of characters, topics, authors' details, etc)
- tables can be added to the abstract (following criteria defined by the Scientific Committee)
- the technical development of the system allows an inclusion of graphics and images in the abstract.
- scientific characters, symbols and text formatting (such as bold, underlined, etc) can be easily added through a dedicated and exclusive dialogue box
- a first verification is done automatically by the system before acceptance of the submission (check that all required data are correctly entered)
- once the abstract is accepted for submission, a confirmation number is automatically given to the author for further relations with the Scientific Committee or PCO
- The PCO will ensure the latest SBE guidelines are referred to ensuring that the correct requirements for abstract and awards submissions are included

Awards

- the abstract submission portal will include the ability for submitters to apply for the various awards associated with the Annual Meeting.
- The abstract submission portal will clearly detail all required documentation for awards submissions
- the abstract submission portal will include online submission of all the documents necessary for each award and only allow completion of award applications if all the required documentation has been submitted

Schedule of services provided to Society for Molecular Biology & Evolution

- The PCO will work closely with the Local Organising Committee and the Society to ensure all criteria for the award submissions is included and correct at the stage of the launch.
- All submissions for the awards will be made available for review clearly marking out which award they are submitted for.

First Stage Review

- after receipt of all submitted abstracts the Scientific Committee will be given access to review all submitted abstracts
- this review is made on-line by connecting to the file maintenance side of the system through administrator code names and passwords. Reviewers can then either review abstracts on-line or print out the abstracts to read them off-line and get back on-line to enter the scores
- abstracts can appear with the full authors' details, only the country of the submitting author, or blinded

Second Stage Review

- for an on-line review, instructions for reviewers, website domain name, individual code names and passwords are sent to reviewers following the instructions and the reviewers list given by the Scientific Committee
- abstracts can appear with the full authors' details, only the country of the submitting author, or blinded.

9. INTERNET ABSTRACT MANAGEMENT AND ADMINISTRATION

Collecting Scores

- scores can be performed by the reviewer either on-line by connecting to the system through individual code names and passwords and by completing the electronic score sheet or can be forwarded to the PCO on a print out of the scoring sheet
- a tool is available to issue precise statistics on the scoring process (i.e. already scored abstracts, pending abstracts, abstracts scored per reviewer, etc.)

Final Review / Abstract Meeting

- for the Scientific Committee abstract meeting, final review can be performed either on-line by connecting to the file maintenance side of the system through administrator code names and passwords or on paper abstracts (after a print out of the database)
- scores can be made available either on individual reviewers score sheets, or on a general listing indicating the scores of all reviewers per each abstract
- abstracts can appear with the full authors' details or blinded

Creation of the Final Programme

Schedule of services provided to Society for Molecular Biology & Evolution

- for the Scientific Committee abstract meeting, the committee will be able to create the sessions and the final programme from the content in the database
- the Scientific Committee will also have the possibility to make various displays of the final programme and of the sessions
- abstracts can appear blinded or not

Abstract Acceptance / Rejection

- following the decisions taken by the Scientific Committee, confirmations of acceptance or refusal of the abstract are sent by E-mail to authors
- in case of acceptance of the abstracts, information concerning date, place and type of presentation are given to authors following the Scientific Committee instructions.

Abstract Publication

- following the results given by the Scientific Committee, the accepted abstracts can be made available for publication
- abstracts will be included within the event app and can be prepared for sharing with any partner journals.

10. SPONSORSHIP STRATEGY AND IMPLEMENTATION

Strategy and Implementation

- research previous SMBE conferences
- obtain an electronic database of prospective sponsors supplied by the Principals
- research and identify other likely sponsorship prospects
- utilise PCO network of contacts to identify funding opportunities for the Conference
- advise on sponsorship strategy
- advise on commercial sponsorship packages
- develop a detailed set of benefits to sponsors
- prepare and produce a detailed sponsorship document and detailed booking form either in pdf format or a printed brochure
- prepare a letter of invitation to sponsors to accompany the sponsorship document
- distribute copies of the invitation letter and sponsorship document to the prospective sponsors
- continue to follow up prospective sponsors by phone and email
- negotiate and agree levels of funding with prospective sponsors
- co-ordinate meetings with prospective sponsors and the Principals and attend if required
- agree a schedule of stage payments with the sponsors
- answer enquiries in relation to Conference sponsorship opportunities
- monitor progress against targets
- prepare individual sponsorship contracts to all confirmed sponsors to include total amount sponsored and the list of benefits each company will receive

Schedule of services provided to Society for Molecular Biology & Evolution

- once sponsors are secured, liaise with sponsor/s to ensure that all their requirements are implemented.

Financial Administration

- advise on sponsorship VAT treatment
- raise invoices and send to sponsors.

11. EXHIBITION

Exhibition Planning

- review and make recommendations on exhibition areas/proposed room usage
- assist in negotiations with the Conference venue regarding all arrangements pertaining to the exhibition
- advise on potential contractors as required
- identify the need for draping and carpeting and co-ordinate hire, if required.
- prepare floor plans.

Exhibition Promotion

- advise on exhibition promotion strategy
- advise on commercial exhibition packages
- as directed by the Principals, obtain an electronic database of prospective exhibitors supplied by the Principals and distribute copies
- prepare a preliminary notification and distribute this to prospective exhibitors
- prepare and produce an invitation to exhibit and distribute these to prospective exhibitors
- answer enquiries in relation to Conference exhibition opportunities
- monitor progress against targets
- allocate floor space to exhibitors
- advise on and distribute exhibitor confirmation letters.

Implementation and On-Site Management

- prepare and produce an exhibitors information manual and distribute this to all confirmed exhibitors
- co-ordinate with the venue agreed exhibition plans, fire/safety regulations, delivery times and storage facilities
- collate exhibitor information for the final Conference programme and/or co-ordinate production of an exhibition guide for distribution at the Conference
- liaise with confirmed exhibitors and ensure that all their requirements are implemented
- coordinate routine queries and contacts from exhibitors
- co-ordinate the provision of signage
- co-ordinate the floor management of the exhibition during the Conference
- ensure all stands are built-up and broken down within agreed timescales
- staff an exhibition registration desk, as required

Schedule of services provided to Society for Molecular Biology & Evolution

- co-ordinate production and distribution of exhibitors' and their sub-contractors' badges
 - co-ordinate security for the exhibition area, as required.
- Financial Administration**
- obtain quotations for all aspects of a commercial exhibition
 - prepare an exhibition budget and incorporate in the main Conference budget
 - provide accounting services and control exhibition related income and expenditure
 - issue invoices for exhibition space.

12. SOCIAL PROGRAMME

Social Programme

- offer advice and assistance on the development of the social programme
- establish a budget for the social programme in consultation with the Principals
- co-ordinate the promotion of the social programme to prospective delegates
- administer ticket sales as part of the Conference registration process
- co-ordinate the production of tickets and menus, as required
- on behalf of the Principals distribute invitations to dignitaries, as appropriate
- check all invoices for which the PCO is responsible
- liaise with exhibitors and sponsors, as appropriate
- issue thank you letters on behalf of the Principals
- prepare the following standard reports for distribution to the Principals:
 - total number of tickets sold/registrations for each social event
 - a list of those attending each social event

Venue(s) and Catering

- research and recommend suitable venue(s) for each social event
- check and hold available dates at the venue(s)
- collate information on prices for comparative purposes
- obtain and distribute venue(s) brochures
- co-ordinate Principals site-visits, if required
- attend site-visits and advise on room usage and "fit" with the proposed social programme, if required
- co-ordinate a detailed planning meeting at the venue(s), if required
- advise on and negotiate contracts
- agree all terms and conditions with the venue(s) on behalf of the Principals
- agree a schedule of deposit payments with the venue(s) on behalf of the Principals
- agree requirements for sign posting at the venue(s)
- negotiate and agree catering arrangements
- liaise with the venue(s) prior to and during the social event(s) regarding numbers.

Schedule of services provided to Society for Molecular Biology & Evolution

Room Dressing and Stage Management

- supervise set-up of the agreed theme including room dressing, special effects, PA systems and lighting
- ensure rooms are laid out as required for the social event(s)
- liaise with key staff at the venue throughout the social event(s) to ensure that all contractual agreements are implemented smoothly
- arrange briefing meeting(s) with the Principals and key staff from the venue(s), as required
- supervise and monitor all rooms being used for the social event(s)
- supervise all catering arrangements on-site during the social event(s)
- co-ordinate the preparation and posting of appropriate signs
- co-ordinate all security arrangements, as required
- co-ordinate all stewarding arrangements, as required.
- co-ordinate entertainment, as required
- arrange for photography, as required.

13. ACCOMPANYING PERSONS PROGRAMME AND TOURS (if required)

Accompanying Persons Programme

- prepare and recommend various options and excursions within appropriate price ranges
- coordinate a programme for accompanying guests which can be self-financing
- establish one accompanying persons registration fee category
- coordinate all administration relating to accompanying persons
- prepare the following standard reports for distribution to the Principals:
 - total number of tickets sold/registrations for the accompanying persons programme
 - a list of those attending by event/tour including accompanying persons name and country
- where required agree set-up costs to produce additional reports or data capture tailored to the needs of the Principals.

Conference Tours

- coordinate an exciting programme of pre and post Conference tours, as required
- as instructed by the organisers, coordinate a programme of tours for the delegates running concurrent with the Conference.

14. TRANSPORT, CONFERENCE INSURANCE AND EVALUATION

Transport

Schedule of services provided to Society for Molecular Biology & Evolution

- coordinate transfers from airports to accommodation – if required
- coordinate transport for VIPs – If required
- coordinate transport from accommodation to the venue – if required
- coordinate transport to all social functions – if required

Conference Insurance

- advise and implement the necessary insurance cover for the Conference, as required.

Evaluation

- advise on and agree with the Principals the questions and layout of an evaluation form
- accessible via the event app during the final day and post event
- co-ordinate the production of evaluation forms
- distribute and collect completed evaluations at the Conference
- based on the completed evaluations prepare a report summarising delegate responses.

15. FUTURE DESTINATION FEASIBILITY STUDY SUPPORT AND REVIEW

Bid support

- liaise with representatives from potential destinations for future SMBE Annual Conference
- support bids from destinations with providing relevant information
- coordinate the bids to ensure all information is collected in order to meet relevant deadlines
- collate destination information and share with SMBE along with recommendations

Destination selection

- liaise with shortlisted destinations around any additional information required
- coordinate visit to chosen destination ahead of contracting