Hybrid Congress Guidelines

INTRODUCTION

The Coronavirus Pandemic has forced the entire global business and professional events industry to consider new ways of designing and delivering meetings, events and congresses. Importantly, for associations, it too has forced them to reconsider how to design and deliver their own congresses and conferences to ensure they meet the objectives of their members and stakeholders alike.

Some of the biggest challenges facing associations in planning and delivering their congresses and conferences today are the COVID-related unknown variables regarding safe and secure movement of people, financial implications, ROI and the difficulty in selecting the most appropriate, strategic and professional partners to choose to work with.

This Association Congress Bid Guidelines Template has been written specifically for associations that deliver their congresses and conferences in destinations around the globe to aid them in identifying the many key considerations that are required today and tomorrow when writing their own Congress or Conference Bid Guidelines that are used in the bidding process of their respective event.

It is the culmination of a unique collaborative of meeting professionals from Convention Bureau and PCO backgrounds, together with final input and recommendations from a number of regional and international medical and scientific associations.

In the true spirit of open international knowledge-share and support for our industry, it is provided, on a complimentary basis, to any organisation or person involved in the life cycle of an association congress or conference.

We hope that it provides assistance to other meeting professionals and association executives as they re-draft their own bid guidelines for the new hybrid conference model.

BestCities Global Alliance

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International Association of Professional Conference Organisers (IAPC0)

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BACKGROUND TO THE GUIDELINES

HOW DOES HYBRID MEETING DIFFER FROM A PHYSICAL MEETING?

A live in-person event is where attendees meet in the same physical location at the same time. A virtual event is run entirely online, there is no in-person component, attendees interact through a virtual platform and do not meet in a physical location. A hybrid event combines in-person and virtual event experiences.

WHY DO BID GUIDELINES NEED TO CHANGE?
Due to the uncertainty that has arisen as a result of COVID-19 and in order to safeguard key Congresses in the future, Associations should consider adapting their Bid Guidelines for a hybrid event.

Local governmental restrictions around face-to-face gatherings, in the destination hosting the event, as well as taking into consideration where delegates will be attending from, need to be considered. As we progress towards more certainty around the safety of face-to-face meetings, some people are going to be eager to travel and attend physical events again while others may still be cautious.

A hybrid event will cater to both groups. There are also potential added benefits such as expanded reach and increased attendance, enhanced opportunities for attendees travelling from LMIC, increased sponsorship opportunities, reduced environmental impact and reduced travel costs for attendees, speakers and supporters.

WHAT SHOULD AN ASSOCIATION CONSIDER WHEN WRITING A BID GUIDELINES FOR A HYBRID EVENT?

A hybrid event is not as simple as putting your existing event online - it involves a whole new programme which can be quite time consuming. Having your PCO and Convention Bureau working alongside you is crucial.

Initial considerations should include: -

- What components of your meeting could go virtual?

- How will you bring delegates together for effective knowledge sharing and networking?

- How will sponsors and exhibitors engage with virtual participants?

- Global time zones when creating the programme.

- How will your virtual elements bring value to the destination and what support do you require from the destination?

BID GUIDELINES

One of the biggest challenges when preparing bid guidelines for a hybrid congress is the amount of unknown variables. For example - will entry be allowed from all countries, how many people are allowed in the halls and what will be the willingness of people to travel and sit in one room with international participants. These variables will change over time making it hard for Associations, PCO's and destinations to provide definitive answers. The key is to work in partnership and focus on what you can control accepting that changes are very likely.

1. **INTRODUCTION**
   MANDATORY
   An introduction to the structure of your Association, your Association's mission and aims is crucial for your recipients to understand your organisation.
   Include the following: -
   ● Main objectives of the Congress and how it relates to your mission.
   ● History of the event – previous, current and future world congresses
   ● Examples of achievement of objectives (i.e., community engagement, new research collaboration, legacy projects, etc.)
   ● Previous delegate attendance levels from last 4 meetings (in person and virtual)
   ● Significance of the congress to the Association (i.e., whether it is a main profit-making activity, what are your financial objectives, etc)
   ● Has the congress been virtual/hybrid before?
   ● If you have held a hybrid congress before what was the split of registrations (virtual & live) and what was the breakdown of the sessions?
   ● Preferred dates and timing for physical in-person element?
   ● Will there be a social program and touring opportunities for the physical in-person attendees?
   ● A breakdown of your Membership by regions/countries is useful to know.

   OPTIONAL
   The more information you can provide the better. The questions below should also be considered: -
   ● Are you planning to have any virtual element and what would this entail? (i.e., full live stream of all elements, on demand distribution post-event)
   ● Do you have a geographical rotation policy?
   ● What other international meetings within your field potentially crossover with your Congress (i.e., similar fields, consider overlapping delegates profile)

2. **DECISION PROCESS/BID SELECTION CRITERIA**
   ● Timeline of the bid process (i.e letter of intent submission, bid submission, shortlisting, site visit, final presentation, final announcement, etc.)
   ● Who is eligible to submit the bid? (i.e., local member/body, destination, venue or PCO?)
   ● How and to whom should the letter of intent and the bid document be submitted?
   ● How is the final decision on destination selection made? (i.e., by vote of the Board/Executive Council or member vote at a General Assembly?)
   ● What is the process for virtual Board/Executive/members to be able to vote?
   ● Key evaluation criteria

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2. DECISION PROCESS/BID SELECTION CRITERIA (cont.)

- Mandatory content of the bid proposal, including whether support letters are required, financial and/or budget expectations from the International Association
- Will a presentation of the bid be required either in person or virtually?
- Site visits (i.e., who is involved, what should be included in the itinerary, is the destination expected to bear the cost including flights and accommodation)
- Regulations during bidding activities (i.e., is lobbying and gifts to decision-makers permitted?)
- Roles and responsibilities of stakeholders (i.e., is a local host required, what are the roles of the international association, local host and the PCO)
- Importance of destination support (i.e., financial, in-kind, marketing, etc.)
- What are the expectations surrounding any risk being shared by the destination, PCO and venues?
- Who is the financial underwriter? Are there any financial responsibilities for the local host or destination?

3. EVENT REQUIREMENTS - VIRTUAL ELEMENT

Platform/ Software Choices
- Software type: some software provides a 3D experience (i.e in the exhibition halls and networking areas). Do you feel this is necessary or would it be a 'nice to have' option?
- Social / networking platforms and solutions for on-line attendees (i.e., consider impact due to different time zones, is it live content or recorded at a particular time?)
- Do you have your own or a preferred meeting platform/software that you would like to stream from? Do you need one developed locally and included in the budget?
- How many attendees do you expect could be watching online?
- How many virtual areas are you likely to need in the platform/software? (i.e., Lobby / Entrance)
- How many speakers are you expecting to be virtual?
- Are you planning to have virtual networking sessions? If so, your thoughts around attendance, timing and duration would be useful.
- Presentations: will they all be recorded or live or a combination of both?
- Have you considered making presentations available for on-demand viewing at a later date?
- Do you require polling? (i.e., at General Assembly/Board Meeting or throughout conference)

Poster sessions
- How many days / hours per day approx.
- Please explain your vision for the digital posters, if delivered on-line to virtual attendees

3. EVENT REQUIREMENTS - VIRTUAL ELEMENT (cont.)

Online Exhibition
- How many virtual booths will be required?
- Will exhibitors require virtual meeting rooms for presentations?
- Will you require live event chat? Will any live event chat be managed by the association?
- What parts of the congress/conference do you hope can be delivered on-line (plenaries, exhibition, scientific programme, etc)?
- Do you intend to include a social programme for the virtual accompanying persons?
- Examples, if any, of previous virtual exhibition delivery?
- What do you feel your exhibitors will be willing to pay for an online booth?

Registration and promotion
- What do you feel your attendees will be willing to pay for in-person and on-line attendance? Please provide past registration data if possible.
- Do you have access to the most up to date database of potential participants?
- Do you intend to survey delegates after the event? Yes / No
- Do you intend to provide Certificates of attendance? Yes / No
- Application for CPD points required? Yes/No

4. EVENT REQUIREMENTS - PHYSICAL ELEMENT

- Accessibility (transport)
- What type of venue are you looking for e.g., conference centre, conference hotel, university?
- What level of accommodation do you require - Hotels & star rating, B&B, campus accommodation?
- Scientific programme format
- Do you have a Social Programme - what are the requirements?
- Do you have a Partner Programme – what are the requirements?
- Technical requirements for onsite live event
- In person posters, how much space is required or how many posters are you looking to display?
- How many physical rooms are required?
- How many attendees are you hoping to attract?
- How many speakers will you have?
- How many exhibition booths are you expecting, what size of booths are being offered?

Additional questions for consideration
- Do you require Q&A during physical and/or virtual sessions (Text or video)?
- Will your breakout rooms be interactive in nature?
- Will there be any pre-recorded sessions to film and upload?
- Will you be live streaming all sessions or only partially?
- Will you make every session (presentation) available on-demand after the conference? Will this be pay-per-view or free to view?
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Additional questions for consideration (cont.)
- Do you have your own meeting platform/software, or do you need one developed locally and included in the budget?
- Necessary AV equipment, studio setup, Wi-Fi and wired network capability for the virtual conference component?

5. DESTINATION MARKETING REQUIREMENTS

- What services will you be seeking from the convention bureau to help market the destination to your potential physical and virtual delegates (i.e., touring information, videos)?
- Is there the requirement for the convention bureau to provide and manage an onsite information desk?
- If due to Pharmaceutical Codes of Conduct destination marketing to delegates is not allowed in any form, please advise in the Bid Guidelines.
- As well as destination marketing assets, would there be the option for the host city to promote relevant sector specific information?
- Will there be a requirement for the chosen host city to have a physical or virtual presence at a future meeting (prior to the one they are hosting) to assist with promotion of the future destination to delegates?
- What other marketing assistance can the host city provide to assist with delegate boosting?
- The host destination will provide you with COVID Safe Information. Do you have any specific requirements?

6. ACCESSIBILITY, DIVERSITY & INCLUSION
- Are there any particular requirements for delegates within the venue and across the city with regards to accessibility?
- Should the bid document include information on how to travel from the airport to the city/main venue along with costs and timings?
- Is there a requirement for simultaneous translation services and if so, into how many rooms and how many languages? Have you considered how this will be facilitated to the virtual participants?
- Is there a requirement for sign language translation on site and if so, in which meeting rooms (i.e., plenary and/or concurrent session rooms)?
- Will the conference website be translated into multiple languages? If so, how many?
- Will any of the delegates be travelling with caregivers? If so, please advise approximate number and details regarding special arrangements required?
- On-line accessibility - is there a requirement for the website to offer computer-based audio listening/speaking.
- Visual accessibility - is there a requirement for large fonts with a high contrast colour scheme.

7. **IMPACT & LEGACY AMBITIONS**
   - Is there a particular legacy ambition that has to be realised from the conference?
   - Are there any legacy ambitions that will be continued from meeting to meeting?
   - Are any of the congress legacy ambitions in line with the UN Sustainable Development Goals? https://sdgs.un.org/goals
   - Do you have any impact measurement tools in place?
   - Host destinations will need to motivate support in line with the following criteria (only where relevant) i.e.
        i. Will this event benefit the destination/region in enhancing the knowledge and innovation economies?
        ii. Will this event benefit the destination/region in enhancing possible trade and investment opportunities?
        iii. Will this event advocate for policy and governance issues that might affect the region?
   - Have you considered how your impact and legacy ambitions will transfer to a virtual audience?

8. **FINANCIAL AND ACCOUNTABILITY**

   - Can you provide a breakdown of revenue streams (i.e., Sponsorship, Exhibition, Delegate registration etc)?
   - Roles and responsibilities of PCO
        i. Do you have the most up to date tendering process to select and appropriate PCO? If not, consider: White Papers | IAPCO: The International Association of Professional Congress Organisers
        ii. Do you require the Convention Bureau to undertake the tendering process on our behalf?
   - Agreements. Who will be the signing authority for all agreements?
   - Is financial support required from destination?
   - What are the financial objectives of the Congress (i.e., profit making, breakeven, profit share)?
   - Financial underwriter. Who is responsible?
   - Is a full budget required with bid submission?
   - Are you aware of any specific taxation requirements that need to be considered?
   - Financial coverage for medical security processes (i.e., required tests or diagnosis procedures that might be asked for from any destination concerning COVID 19 in the process of entry to the country host or exit)

THANK YOU

Special thanks to the IAPCO Ambassadors, BestCities Board Members and Association Executives who came together (on-line, virtually) to collaborate and write this document. It is through such commitment and professional contributions that the meetings and events industry continues to drive forward and support association clients around the world.

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Thank you, all!

About BestCities Global Alliance

BestCities Global Alliance is an international network of leading convention destinations around the globe. They are distinguished by the commitment of the members' convention offices to offering special standards of service. Members include Berlin, Cape Town, Copenhagen, Dubai, Dublin, Houston, Madrid, Melbourne, Singapore, Tokyo and Vancouver. By working together, BestCities adds a unique value to its member cities. This 'Alliance thinking' not only brings a level of creative client solutions no individual partner city could deliver on their own, but in turn helps BestCities' members achieve their own objectives, better than they could alone. www.bestcities.net @BestCitiesGA

About IAPCO

The International Association of Professional Congress Organizers - IAPCO, with more than 52 years of history representing today 139 companies comprising over 10,270 meeting professionals of international and national congresses, conventions and special events from 40 countries. www.iapco.org

APPENDIX

GLOSSARY

ACRONYM	DEFINITION
AMC	Association Management Company
APAC	Asia Pacific
AV	Audio-visual
BE	Business Event
B2B	Business to Business
B2C	Business to Consumer
CFB	Call for Bids
DDP	Day Delegate Package
DELS	Delegates
DR	Dietary Requirements
EC	Executive Council

EOI	Expression of Interest
FOC	Free of charge
GA	General Assembly
IA	International Association
IAPCO	The International Association of Professional Conference Organisers
KDM	Key Decision Maker
KOL	Key Opinion Leader
KPI's	Key Performance Indicators
LH	Local Host
LMIC	Low Middle Income Country
LOC	Local Organising Committee
LOI	Letter of Intent
LOS	Letters of Support

LSC	**Local Scientific Committee**
NA	**National Association**
NBO	**National Bid Off**
PAX	**People**
PCO	**Professional Conference Organiser**
PR	**Press Release**
Q&A	**Questions and Answers**
RFP	**Request for Proposal**
WIFI	**Internet**

WORD	DEFINITION
Abstract	**A conference abstract is submitted by a prospective speaker upon which the international association or other stakeholder determines whether to allocate a speaking slot to the speaker at the event (it is often the only piece of work that conference organisers will see, so it needs to be strong enough to stand alone).**
Bid Budget	**A bid budget is often requested as a part of the bidding process. An international association should specify whether the bid submission should include a bid budget, what delegate scenario numbers the**

	budget should be prepared on (i.e., breakeven, 400 pax, 500 pax, 600 pax) and also whether a third party (usually a professional conference organiser) can be asked to prepare this (in return for them being able to tender for the business should the host city be successful with the bid).
Bid Guidelines	**A set of guidelines produced by an international association or professional conference organiser/association management company to which international destinations respond.**
Breakout Room	**Breakout rooms are useful in meetings to enable practice in small groups. Breakout rooms allow you to split your meeting into many separate sessions.**
Concurrent Session	**Concurrent sessions are sessions held simultaneously (at the same time) as other sessions with delegates having to make a choice regarding which one they attend.**
Conference Website	**The website in which all information pertaining to the meeting is held for public viewing.**
Delegate Boosting	**Delegate boosting is about implementing strategies to maximise delegate numbers to your meeting (this is often done in conjunction with the convention bureau).**
Destination Marketing	**Destination marketing relates to the marketing assets that a convention bureau will provide to assist with the promotion of the meeting (an association should advise whether destination marketing is allowed by the host city to attending delegates).**
Destination Support	**Support that is requested from the bidding city (i.e., financial, in-kind, marketing).**

Digital Posters	**A static or dynamic digital object which focuses on a particular topic and is used to present research.**
Exhibition	**A display of works or items of interest on display at a trade fair.**
Exhibitors	**Someone who organizes an exhibit for others to see at a meeting/conference.**
Face to Face Meeting	**An in-person meeting (not virtual).**
Financial Support	**Financial support can be cash or in-kind support which is offered to a meeting by the convention bureau, local host or other stakeholders in return for the meeting being held in the particular city. It is also sometimes known as subvention.**
Financial Underwriter	**The organisation that is responsible for financially underwriting the meeting (taking on the financial risk for the meeting whether this be a profit or loss).**
Host Destination	**The host destination is the main destination that is hosting the meeting.**
Hybrid Meeting	**A meeting that combines a live in-person event in conjunction with a virtual online component.**
Industry Site Visits	**Industry site visits usually form a part of the official conference program and are sometimes held prior to the main conference program commencing. They are often sector specific places of interest that delegates to a meeting would have an interest in visiting.**

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Interactive Sessions	Interactive sessions serve as a platform to enhance collaboration between a cross-section of project stakeholders and team members to explore, discuss and reach solutions about a particular aspect of a project.
Key Evaluation Criteria	The main criteria upon which the bid document/application will be rated/graded.
Legacy	The long-term positive impact a meeting has on the host area/industry sector culturally, economically and physically (such as the improvement of infrastructure).
Letters of Support	Letters from local and state government, business event suppliers and sector organisations to support a bid document.
Live Streaming	To transmit or receive live video and audio coverage of (an event) over the internet.
Lobbying	Influencing a decision maker on a particular topic/issue (associations should make clear in the bid guidelines document whether lobbying of key decision makers by a convention bureau, local host organisation member or other individual is permitted).
Local Host Organisation	The organisation that is responsible (in full or partly) for the delivery of a meeting (i.e., a local host organisation could be the member organisation of the international association that is helping deliver the meeting).
Multi-Hub Meeting	A multi-hub meeting is one where a city is chosen as the main host destination (where the majority of the delegates congregate face to face) however other sites area made available whereby delegates may also congregate to attend the meeting (i.e., the meeting main

	hub could be Melbourne with multi-hub sites in New York and London).
National Bid Off	**An international association sometimes prefers to only receive one bid per country (rather than receiving multiple city bids from the same country). This usually means that the local host will perform a 'national bid off' process prior to submitting the international bid to determine which city they will partner with.**
On Demand Content	**Content that is recorded live or pre-recorded and can then be downloaded for access and review at any time (may have an expiry date).**
Overflow Venues	**An overflow venue is a venue external to the main meeting venue that will also be used to house meetings/sessions.**
Plenary Session	**A session of a conference or other meeting at which all members are expected to attend.**
Polling Technology	**Polling technology is an electronic device or app which allows delegates to a meeting to vote on a particular issue or provide an opinion on a topic with the results available instantly for analysis.**
Poster Board	**A physical poster (paper, laminated) that is hung on a physical poster board to present research (the researcher will usually stand by their poster at certain times throughout an event to talk about the research being presented).**
Registration Fee	**The cost to attend the meeting (usually involves various categories of registrations at different price points – member versus non-member for example).**

Remote Presentations	**A remote presentation is one whereby the speaker is not physically present in the main meeting destination however is executing their presentation from a different location.**
Rotation Policy	**Information on whether the meeting has a set rotation policy amongst regions of the world (usually Asia Pacific, North America and Europe) and how often the meeting is held. Also, useful to advise whether a meeting would return to a previously used city or country if held there before and if so, the optimal number of years between the meeting being held in the city or county and it returning.**
Scientific Program	**A program consisting of international scientists that meet and present the current research in the field and in interdisciplinary research.**
Site Visit	**A physical visit to the bidding city and country prior to or post a bid decision being made (usually to visit the venue, hotels, social event venues, meet with the local host etc).**
Social Events	**Any events of a social nature that form a part of the official meeting program (i.e., welcome reception, gala dinner, networking drinks).**
Software type	**All solutions for virtual events are mainly based on Live streaming, but it differs from one to another depending on features, regarding branding, interaction, Q&A and certificate claiming for the audience.** **-Normal Streaming:** **This the basic streaming platforms as Zoom, Microsoft Teams, WebEx, etc ... it only gives live streaming and basic chat for Q&A.** **-2D Platform: Same basic features as basic one in addition to additional branding and sponsorship tools in a 2D format, like banners, logos, sliders, posting pdf brochures and interactive chat between sponsors and audience sometimes @extra cost.**

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	- 3D Platform: It gives a different virtual experience for the audience, through 3D scenes and solution for Exhibition, Poster area and Halls to make you feel on a real exhibition, you can see real booths and navigate between booth and interact with exhibitors as if you are there. it gives additional options like leader board, post reporting for attendance in each hall and session. All software is similar in registration process and marketing communications
Speakers	A speaker is someone invited to speak at a meeting whether it be in person or virtually (often as a result of an abstract being accepted).
Speaker Preparation Room	A room where speakers can upload and/or test their presentation material prior to the presentation of their session. Also known as the Speaker Ready Room.
Sponsors	A person or organisation that pays for or contributes to the costs involved in staging an event in return for advertising.
Stakeholder	A person or organisation with an interest in the bidding process.
Touring Program	A touring program is a program of activity in the host destination and/or region that is offered to delegates to partake in pre or post the main meeting.
Virtual Event Platform	Virtual event platforms provide event organisers with the tools to plan, create, promote, run and manage online events through an interactive digital platform.

Virtual Meeting	**A meeting that is run entirely online (no live in-person component, attendees interact on the web and do not meet in a physical location).**
Virtual Networking Sessions	**A networking event that is only attended by virtual delegates.**
Wi-Fi / Wired Network Capability	**A wired network connection can be defined as a jack in which a network connection is plugged and hence a wired connection is established.**