



**Water Institute of  
Southern Africa**

## **CALL FOR PROPOSALS – PCO & RELATED SERVICES**

### **WISA 2024 Biennial Conference and Exhibition**

**Invitation to submit proposals for the appointment of a Professional Conference Organiser (PCO) for the WISA 2024 Conference & Exhibition to be held at the Durban ICC, Durban, KZN from 27 to 29 May 2024**

The Water Institute of Southern Africa NPC (WISA) is pleased to invite interested organisations to submit proposals for the appointment as Professional Conference Organiser (PCO) in respect of the above Conference. The following information is provided to assist you with the preparation of a detailed proposal and quotation for the Organising Committee (OC) to consider.

**NOTE: The Venue for the above-mentioned event is already secured by WISA. Therefore, submitters do NOT need to secure the venue/hold dates.**

### **TIME FRAME FOR TENDER PROCESS**

Closing date/time for tender submission: 12 noon, 2<sup>nd</sup> June 2023

### **SUBMISSION OF PROPOSAL DOCUMENTS**

Electronic submissions can be sent to [events@wisa.org.za](mailto:events@wisa.org.za), with the Subject line “WISA2024 services proposal – [Company Name]”.

Written confirmation of receipt will be communicated via return email.

### **ENQUIRIES**

Requests for further information or clarification of requirements may be directed to:

Jaco Seaman,

WISA Marketing and Events Manager

Email: [events@wisa.org.za](mailto:events@wisa.org.za), Landline: 011 805 3537

Please note that WISA reserves the right to advise, at our discretion, all parties issued with this invitation, of further information/clarification of requirements resulting from any query. WISA also reserves the right to respond to or inform all parties of the outcome or progress.

## INTRODUCTION AND BACKGROUND

WISA 2024 Biennial Conference & Exhibition.

### ORGANISATIONAL BACKGROUND AND GUIDELINES

We seek the services of an extremely professional, highly competent, well-managed, flexible, and creative Conference Organiser to assist us in ensuring a profitable and highly successful conference.

The PCO will be responsible for, in conjunction with the OC, the conference organisational activities to ensure that it is run effectively and efficiently, is well co-ordinated, and is profitable as per WISA's requirements, at all times.

The WISA Biennial Conference is held every 2<sup>nd</sup> year. The conference usually attracts between 1500 and 1800 delegates and includes a trade exhibition. The majority of these delegates are locally based with some international participants. It is envisaged that the conference will attract a wide spectrum of people from various specialities and allied disciplines. The conference program usually consists of approximately 8-10 parallel sessions with workshops and symposia. This is complemented by a social programme and Technical Tour.

### CONDITIONS OF APPOINTMENT OF A PCO

The successful organisation is required to be an accredited member of the South African Association for the Conference Industry (SAACI), or similar body, and be capable of providing a professional conference managerial services for the conference in line with international standards and best practices. Professional registration, with SAACI or a similar body, is considered verification of a company's capability to organise a conference to such a standard.

The organisation should prove their ability through providing the following:

- **Ability:** Demonstrate their ability to supply the required services as detailed in the 'Services to be Provided', outlined below.
- **Financial Viability:** Demonstrate their financial credibility and supply a **certified copy of their Tax Clearance Certificate** and a letter of **Financial Good Standing from their Bank**.
- **Proven Track Record:** Demonstrate their experience as a PCO by providing information on meetings/ conferences/ events they have managed, especially conferences of a similar size and complexity. Please also indicate if you have arranged any conferences for WISA before.
- **References:** Submit at least five referees who will be contacted by representatives of the OC. Details required are name, contact information, event with which they were/

are associated, and position in relation to the organising of that event. Additional letters of reference may also be attached.

- **Staffing:** Provide an overview of their resources including staffing, experience and accreditation with particular emphasis on Financial Management and the Project Manager who will be working with the OC. Please specify the employment status of all (permanent, part-time, contract).
- **Electronic Management:** Demonstrate their IT capability, capacity and ability to provide electronic facilities in a secure environment.
- **Financial Management:** Demonstrate their competence in the area of financial management, including qualification and experience of personnel in this respect. It is expected that all financial reports will be audited, hence compliance to accounting standards must be maintained, and evidence herein must be provided. Penalties will be applied should delays in finalisation and or additional costs be incurred during the audit process as a direct result from poorly managed records.
- **Fees and Cost Structure:** Clearly set down fees to be charged for services and provide sufficient detail as to allow the distinction between:
  - **Commission and percentage-based fees (Sponsorships, advertisers etc.)**
  - **Fixed price fees**
  - **Hourly rates**
  - **Secondary income fees declaration (e.g.: commissions/ royalties/ fees received from the participating venues, hotels and places of accommodation, side events and post tour events, and suppliers).**
  - **Please show VAT clearly.**

## SERVICES TO BE PROVIDED

Note that the areas listed below are by no means exhaustive, but merely indicate areas that are imperative to WISA. Please include additional areas that you deem important.

## CONCEPT AND PLANNING

- Attending planning meetings, compilation and distribution of meeting agendas and packs, minute taking and distribution after meeting.
- General direction and guidance.
- Assign a Project Manager to handle logistical and administrative arrangements.
- Conducting site inspections.
- Develop a timetable of action (due dates/deadlines) and responsibilities.
- Handle all correspondence.
- Provide regular updates on activity status.
- Co-ordinating the various agreements submitted by the suppliers.
- Liaison with the Organising Committee.

## **FINANCE**

- Continuous liaison with the WISA finance department is of utmost importance.
- Develop a conference budget (detailed line-item budget).
- Budget control and management.
- A detailed description of all processes to be confirmed with Management for Audit purposes and compliance checks.
- At minimum conduct monthly variance analyses on expenditure and revenue against budget. Monthly reports to be submitted accordingly as per WISA's requirements/ specifications.
- Management of all creditors and debtors. Monthly reports to be submitted accordingly, as per WISA's requirements/ specifications.
- Submit monthly finance status reports in line with WISA's requirements and specified reporting formats.
- Monthly submission of all invoices, and credit notes issued for registration as reconciled to the Master Document/ Database. All discrepancies must be resolved before submission to WISA.
- Organise insurance for the cost of the conference.
- Discuss all legal issues/ contracts.
- Liaison with selected accounting/ audit firm as required post conference.
- Management of all procurement in line with WISA's procurement policy and processes.
- Disclosure of any and all conflicts of interest, or financial gains from any supplier or service provider related to this conference.

## **PLANNING**

- Co-ordination of registration, fees and deadlines.
- Building of a comprehensive database.
- Design of online and manual registration form.
- Management of all registration files.
- Correspondence with delegates: confirmation letters, invitation letters, receipts.
- Management of payments administration in line with WISA policies.
- Preparation of regular reports as required by WISA, including but not limited to the following: No. of delegates, funds collected, funds outstanding, country reports, No. registrations for social events, tours etc The format of which must be as specified by WISA.
- Preparation of delegate lists by alphabetical order/country of origin/ company.

## **ON-SITE CO-ORDINATION**

- Concept and design of registration materials: delegate badges, vouchers, certificate of attendance, receipts, and social tickets.
- Production of registration materials and registration packs.

## **ON-SITE MANAGEMENT**

- Supervision of on-site registration process.
- Distribution of registration materials.
- Handling of all new registrations on-site as well as payment of pending registrations.
- Set-up of and supervisory staff at the following desks:
  - Pre-registered delegates
  - On-site registrations
  - On-site payments
  - Authors desk/presenters' room.
  - Protocol for VIPs.
  - Accompanying Persons, Tours, Exhibition, Accommodation
  - Social programme, general information and help desk.
- Set-up and staging.
- Design signage and ensure that adequate directional signage is provided in all areas.
- Review traffic flow pattern.
- Security services co-ordination support.
- Health & Safety services co-ordination support.
- Technical assistance to the speakers.
- Staffing and supervision of the VIP lounge, press room, speaker preparation room.
- Schedule briefing sessions with support staff, venue and suppliers to provide overview of conference.
- Determine criteria for staffing.

## **MARKETING**

- Develop a business plan for marketing the conference within 2 months of appointment.
- Develop branding and logo.
- Develop conference colour specifications.
- Selection of website designer.
- Supervision of the website design, production and update.
- Supervision of the design and production of interactive forms: on-line registration, on-line abstract submission.
- Design and print 1st and 2nd Announcements, and electronic announcements.
- Develop, update and manage the conference website in conjunction with the committee.
- Draft a PR Agent contract.
- Source delegate, speaker and VIP gifts.
- Develop and print branding material and conference pack.
- Develop and print signage.

## **SOCIAL EVENTS**

- Develop a social events program.
- Develop an accompanying persons' program.

- Book and contract all social event venues concerned, outside the scope of the conference venue, already confirmed by WISA.
- Identify and source entertainment.
- Identify transportation needs and arrange, where required, transport for social events.
- Develop menus, invitations, seating plan.

### **TECHNICAL TOURS, SITE VISITS AND FIELD TRIPS**

- Co-ordinate site inspections of the conference venue, hotels, off-site social venues.
- Develop and supervise field trips.

### **CONFERENCE PROGRAM AND SPEAKERS**

- Research and contact with potential speakers.
- Design of online abstract submission and instruction form.
- Preparation of call for papers.
- Building of a comprehensive database.
- Receipting of abstracts, reply forms, collation of speaker materials.
- Management of speaker files.
- Co-ordination of editing and proof-reading of speaker materials.
- Administration relating to payment of fees and expenses as approved by WISA.
- Speaker correspondence: audio-visual requirements, publications and travel arrangements.
- Co-ordination of session chairs.
- Develop checklist for speaker equipment requirements.

### **VENUE**

- Provide recommendations for:
  - Audio-visual equipment requirements
  - Computers and other equipment
  - Signage
  - Interpretation services
  - Entertainment
  - Audio-taping services
  - Shipping and storage
- Allocate number of rooms required at the venue.
- Identify and source audio-visual equipment.
- Identify onsite staff requirements.
- Develop a security plan.
- Develop a H&S plan.
- Set-up business centre and administration office for the OC.

### **TOURS AND TRANSPORT**

- Identify and source transport service provider.
- Develop a transport plan.

- Organise airport clearance and welcome desks at the airport.
- Secure and contract with transport service provider.
- Signage for coaches and shuttles.
- Co-ordinate all aspects of transportation.

### **ACCOMMODATION**

- Recommendation of hotels that are within the conference venue vicinity.
- Communication with hotels to finalise rates and terms and conditions.
- Designing a map featuring all the hotels for printing in the announcement booklets.
- Monitoring deadlines for payment and submission of rooming lists to hotels.
- Receiving and processing all accommodation registrations.
- Compiling rooming lists according to hotel requirements.
- Collection of all required deposits directly from delegates for payment to hotels as required

### **SPONSORSHIP & EXHIBITION**

Support the OC in:

- Develop a marketing strategy.
- Development of sponsorship packages for potential sponsors.
- Establish sponsorship levels.
- Distribution of sponsorship packages to potential sponsors.
- Follow-up with potential sponsors.
- Organise and attend meetings that may be required between the Organising Committee and potential sponsors.
- Preparation and management of sponsor contracts.
- Co-ordination of the design, concept, printing and dissemination of promotional materials.
- Liaison with potential and confirmed sponsors.
- Organise and co-ordinate corporate events if required.

### **OTHER**

Identify any other areas that may be beneficial to the success of the conference.