

The Oxford Ophthalmological Congress CIO (the OOC)
Charity no. 1181776

Invitation to Tender
for
Conference Organisation & Event Management Services

Background

The Oxford Ophthalmological Congress is an historic meeting, in its 103rd year, and the second largest ophthalmological meeting held in the UK. It is held annually in Oxford, usually on the first Monday to Wednesday in July. The Congress is a multi-venue user: the scientific content is held at the New Theatre, with accommodation and social events at Worcester College. The concurrent Industry Exhibition is held at the MacDonald Randolph Hotel. These venues could change as other sites become available.

The OOC is currently reviewing contracts with all service providers. This tender relates to the provision of:

- The Secretariat Role: management of all council meetings & related matters
- The Congress (all event management), to include: venue & supplier liaison, speaker liaison, social programme planning (dinners/entertainment/external catering), event advertisement, delegate registration and communication
- The Industry Exhibition, to include: marketing & selling the exhibition to the Industry, floor planning, venue liaison, H&S, ABPI compliance.

The respondent may bid to provide the following services:

Option A

The respondent bids to operate ONLY the Congress

OR

Option B

The respondent bids to operate ONLY the Industry Exhibition

OR Options A + B

The respondent bids to operate the Congress in its entirety to include all scientific programme, event management, secretariat and Industry Exhibition provision.

The budget for these options is set out with the service specifications on pages 3 & 4.

Requirements

The OOC is seeking tenderers with experience and evidence of successful conference delivery on a large national/international scale, delivering a complex scientific programme whilst incorporating social events, and a proven track record of income generation. Past experience within the Ophthalmic clinical or Industry sector would be desirable.

Following the tender process, the OOC may award a new contract(s) from 1 August 2019 for these services and the provision of the Congress in 2020.

Congress Event Aims

- To facilitate the delivery of an engaging programme with the aim of attracting 400+ delegates
- To maintain the Congress's position at the forefront of ophthalmologic conferences nationally and internationally (positive marketing and advertising)
- To achieve an income for the meeting via delegate registrations, Industry fees, advertising and ensuring suppliers offer competitive rates
- To maintain the professional and positive relationships in place within our historic Congress.

Timetable

Deadline for Submissions:	<u>Friday 26th April 2019</u>
Interview of selected respondents	TBC May 2019
Contract Start Date:	1 August 2019

Respondent Instructions

Please send your tender setting out in adequate detail your approach to providing the required services, your strategies for achieving the above aims, your corporate structure, ownership and key personnel, together with evidence to verify your ability to fulfil a contract of this size and nature, including 2 references from existing professional clients to:

Professor Harminder S Dua, Master of the OOC

profdua@gmail.com

&

Mr Timothy Dabbs, Secretary of the OOC

timothy.dabbs@nhs.net

By submitting a tender, you are warranting that you understand the requirements, that all the information/details you have provided are correct and accurate, and that you will keep confidential all aspects of the tender process.

Specification for Service Delivery

Budget:	Overall Event Budget:	c. £100,000 (approx)
	<i>of which</i> the total maximum annual management fee is:	c. £ 36,000
	Option A Maximum fee	£ 30,000
	Option B Maximum fee	£ 6,000

It is the preference of the OOC that:

- An annual fee is paid for services (split across the contract period) by the OOC.
- All income generated from the Congress is paid directly to the OOC.
- All expenditure relating to the Congress is invoiced to/paid by the OOC.

If respondents would like to suggest other commercially viable options for income and expenditure, we would be happy to discuss them. However, our decision will be final.

Option A

Secretariat/Council Support/Conference Organisation/Event Management: £30,000 maximum total

This includes the following:

Secretariat

£ 5,000

- Provide a Secretariat service for the Council.
- Attend Council Meetings and Meetings of Executive Officers (to include minute-taking and meeting documentation preparation). Main meetings are held during the Congress week, in Oxford, Sunday am (Executive followed by Council, approx. 8am to 1pm) and Wednesday (Council, approx. 7.30am to 9 am); and in London (Executive followed by Council, Nov/Dec 1pm to 5pm). Other adhoc meeting may be required but only exceptionally.
- Support Executive Officers on Congress business.
- Archive OOC papers & Congress proceedings.
- Manage all invoicing, book-keeping and reconciliation of accounts in line with the Treasury for all aspects of the Congress.

Accessibility and Promotion of the Congress

- Manage the maintenance and development of the Congress website, documents, marketing, social media etc.
- Promotion of Congress through a variety of media and platforms.

Development & Planning for Annual Congress

£13,500

- Relationship management and ongoing liaison with venues, partners and suppliers to meet Congress requirements: e.g. venues, third-party service providers, accommodation, poster board hire; undertaking necessary risk/H&S assessments.
- Preparation of all delegate information, communication, badges and items for Congress.
- Creation, information gathering, design and production of the preliminary e-Programme and full, and final, scientific programme for print.
- Manage call for papers and posters and timescales/deadlines associated with these.
- Liaison with speakers for registration, accommodation and collection of appropriate documentation (abstracts, biographies and presentations).
- Manage on-line registration and delegate queries.
- Operationally manage the scientific, educational and service led aspects of the meeting.

Event Management

£11,500

- Register delegates/speakers during the event and oversee the delegate experience.
- Liaison with all venues and suppliers during Congress for all logistics (scientific stage layout, catering, audio visual, set up of rooms, posters, marquee & any off-site venues etc).
- Co-ordinate events (scientific, social & Industry related) prior to & during the Congress, to include any troubleshooting.

- Identify, appoint, co-ordinate and supervise staff assisting with events during the Congress, meeting their travel, subsistence and accommodation costs within your budget.
- Manage post-Congress correspondence, evaluation, statistics, administration and updates
- Prepare reports for the OOC Trustees.

Option B: Industry Exhibition planning, sales and exhibition management £ 6,000 maximum

This includes the following:

- Sell the Industry Exhibition space, in a fair and clear process, to support the scientific content of the Congress, providing the very best in innovation and education to the attending delegates.
- To maximise the income of the OOC, in compliance with the ABPI Code of Conduct, sell advertising and marketing opportunities to the exhibiting Ophthalmic Industry.
- Liaise with the venue, on behalf of the Congress, regarding stand placement, catering and set-up.
- Manage the operational set-up (stand allocation) and on-site running of the Industry exhibition (and catering breaks) on behalf of the OOC.
- Liaise with the OOC Secretariat/Congress Manager regarding on-site, day-to-day, operational logistics.
- Staff the exhibition with relevantly experienced team members (who have an understanding & background in service, logistics and compliance).
- Provide a friendly, professional and efficient service to our Industry colleagues who are highly valued within Ophthalmology.
- Prepare reports for the OOC Trustees.

Expenses

There are no further expenses allocated to this role, unless pre-agreed and pre-authorised by the OOC Treasurer. Travel to and from the Congress and the two scheduled council meetings in May and December is at the cost of the Service Provider.

Tender Evaluation

We are looking for evidence of service capabilities as follows:

Essential

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|------------------------------------------------------------------------------------------------------|----------------|
| • Experience of conference organisation and event management (minimum 5 years). | A&B |
| • Experience in health or health related events & conferences. | A&B |
| • Strong organisational, communication (verbal and written) and customer service skills. | A&B |
| • High level of computer literacy (to include Microsoft office: spread sheets/databases). | A |
| • Working knowledge of website management and the use of social media. | A |
| • High aptitude for spelling and grammar with accuracy in data entry and proofreading. | A |
| • Ability and willingness to work both individually and as a member of a team. | A&B |
| • Ability to plan, multitask and act on own initiative, and adapt to changing business requirements. | A&B |

Desirable

- | | |
|---------------------------------------------------------------------------------------------------|----------------|
| • Experience relating to or within the Ophthalmic clinical or Industry sector | A&B |
| • Experience in marketing and sales. | A&B |
| • Experience in basic book-keeping, profit/loss reports/ creating financial statements | A |
| • Knowledge of influencing & negotiation skills | A&B |
| • Knowledge of medical and industry contractual compliance and business continuity | A&B |
| • Experience of Information Commissioners Office (ICO) and the General Data Protection Regulation | A&B |

Essential requirements of tenderers

- The tenderer must be registered with HM Revenue & Customs (HMRC) as a sole trader, partnership, limited company, or other format.
- The tenderer must be registered with the Information Commissioners Office (ICO).
- The tenderer must have adequate business insurance (as advised by our legal department).

A&B
A&B
A&B

Reporting and Accountability

The service provider(s) appointed will report and be accountable to the Trustees of the OOC and contact details of responsible persons in the service provider(s) should be provided upon appointment.

Overall the ideal tenderer(s) will have the relevant and required experience and be a positive strategic fit for the OOC. The Congress is in its 103rd year and we aim to continue the historical ethos and positive, professional appearance for many years to come. Our service providers are crucial in achieving this aim.

De-briefings for Unsuccessful Participants

The OOC intends to offer feedback to every respondent submitting an unsuccessful proposal. The OOC reserves the right to control the format and content of any such de-briefing, and to limit it in any way it believes to be appropriate (which includes, in exceptional circumstances, the right to refuse a de-briefing without giving any reason for doing so).