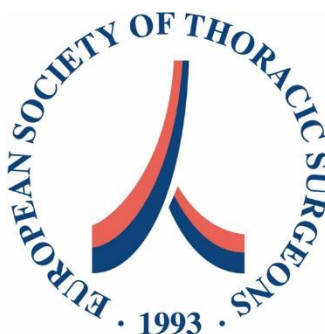


Call for Proposals for Provision of PCO Services for the ESTS 2024-2026



Please send all bids by email AND post to:

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Introduction to the European Society of Thoracic Surgeons (ESTS)

The mission of the ESTS is to improve quality in all aspects of General Thoracic Surgery: from clinical and surgical management of patients to education, training and credentialing of thoracic surgeons in Europe and worldwide. It is recognised as the only international organisation that is solely focused on General Thoracic Surgery.

The ESTS was founded in 1993 and is registered in UK. On 18th of November 1993 a European Consensus Meeting – Foundation Session was held in Heidelberg during a Combined Meeting: The 1st European Conference on General Thoracic Surgery and the 2nd Annual Meeting of the German Society of Thoracic Surgery. Ingolf Vogt-Moykopf, the major proponent of the new Society, was elected President and the first Executive Committee was composed of eleven members with Peter Goldstraw as Vice-President, Toni Lerut as Treasurer and Detlev Branscheid as Secretary General. It held annual Global Congresses since then. Recent congresses were in Naples (2016), Innsbruck (2017), Ljubljana (2018), Dublin (2019), the Hague (2022) and Milan (2023). We will have 2024 Annual Meeting in Barcelona on 26-28 May (<http://www.ests2024.com/ESTS2024>).

The **General Assembly** meets yearly during the Annual Meeting and is the sovereign body of the organisation, which elects the Board. The ESTS comprises of elected members and is the main body that is responsible for all the organization's decisions. It meets 6 times annually – 3 face to face meetings (one during the Annual meeting) and 3 teleconferences.

The **ESTS Board of Directors** consists of President, President-Elect, Past President, General Secretary, Treasurer, Director of Annual Meeting, Director of Education, Director of Database, Director of External Relations and other elected directors (https://www.ests.org/about_ests/board_of_directors.aspx).

Funding of the ESTS

The ESTS is largely funded by membership fees and sponsorship (by industry partners) of the annual Congresses. Historically, there are four to six large industry sponsors and a variable number of other supporters.

Sponsors may purchase/support various elements from the Congress package. They may have sponsored symposia in the congress, may purchase exhibition space and/or sponsor other Congress elements.

This Call for Proposals

ESTS is looking for a partnership with an experienced international organisation that can act as a professional congress organiser (PCO). This call is for the provision of these services from 30 May 2024, for a period of three years, renewable.

The ESTS Board is responsible for the scientific content of its Congresses, and other meetings and activities between Congresses, and will provide the PCO with all necessary information and materials to enable the necessary organisational support.

In the following you can find the most important issues that we would like to address in your proposal; the list should not be considered as exhaustive. Further clarification may be obtained from the President or General Secretary.

General requirements

Communication

PCO must pass all relevant information to ESTS leadership and Executive Director in good time. It must be easily available by email, phone, post-mail and web-systems, responding within a maximum of two working days. Upon request at any time, ESTS should have access to the PCO's documentation and correspondence pertaining to all the ESTS activity.

Copyright

ESTS owns the marks, copyright and intellectual property of ESTS, including the name European Society of Thoracic Surgeons and all other names and marks used to refer to the ESTS, its meetings, congresses and materials. ESTS will permit the PCO to use its trademarks, trade names and materials whenever relevant for the purposes of identifying the ESTS, on the basis that all use of them shall accrue to the sole benefit of the ESTS and be conducted in a manner consistent with the good reputation of ESTS.

Requested PCO functions

General

Please tell us how you propose to be reimbursed for the organisation of the annual ESTS meetings, for example by:

- Organising the congress for a fixed price
- Co-sharing the risk and have a profit share

All congress preparations should be made according to the time schedule in appendix 1.

The PCO should work very closely - including regular phone-meetings - with the ESTS Secretary General, Treasurer, Director of Annual Meeting and Executive Director. The PCO should make a full list of activities and take over the following tasks:

Selection of Congress venues

The congress sites for 2025-26-27 are determined (Budapest, Athens and Zurich respectively). The PCO should assist ESTS in the selection process for suitable meeting venues for 2028, 2029 and 2030, including detailed reports on:

- Availability and stage setting arrangements for plenary and parallel sessions, registration and office space
- AV planning and management
- Suitability of exhibition, catering and poster review areas
- Affordable nearby hotel accommodation for participants
- Arranging necessary site visits with ESTS leadership
- After the selection decision by the ESTS Board of Directors, the PCO should negotiate contracts, prices and conditions down to best market price and highest value with the venue, nearby hotels, catering providers and other relevant outside contractors.

Online content

Please tell us how would you propose to organise the online content for the Annual ESTS meeting, including details of the:

- Virtual meeting platform
- Virtual meeting functionality, to include plenary sessions, breakout rooms, live question and answer sessions, virtual poster displays etc
- Technical support available for both pre-recording of sessions and for live activities.
- Details of how the online content would be merged with the face-to-face activities, should face-to-face activities be possible.
- Post-meeting for access to online content for firstly delegates of the Congress and later all members of ESTS.

Financial Management

The PCO should:

- Prepare the budget of the Annual Meeting in consultation with the President, Treasurer and Director of Annual Meeting
 - Consult on contract format and structure
 - Regularly update and control the budget
- Open a Meeting account through which all finances are managed
 - Obtain all appropriate and approved donations, sponsorships, grants, loans, etc. for the meeting

- Administer all financial transactions of the congress
- Report regularly to the Board of Directors
- Produce a detailed final accounting and final balance
- Contract with suppliers in conformity with the overall agreed budget
 - Re-adjust or re-negotiate with all the suppliers if the number of participants changes

Marketing

The annual ESTS Meeting is the pivotal ESTS activity each year, serving the mission of our society and also are a benchmark of growth, in terms of both participants and sponsors/supporters. Successful marketing of the meetings to both these audiences is therefore the key function of the PCO. Furthermore, the Annual Meeting is the event around which sponsors, members and supporters fund the ESTS. Plans for digital marketing and social media activity should be provided.

Sponsors

The PCO should:

- Conduct continuous research for existing and potential new sponsors and supporters in cooperation with the Treasurer, Director of Annual Meeting and Program Committee, aiming to:
 - make exhibitors and sponsors long-term “strategic partners” of ESTS
 - maximise commercial revenues
 - maximise exhibitor and sponsor satisfaction
 - Discuss and agree with ESTS the best sponsoring prices and conditions for each Congress
 - Prepare contractual paperwork and ensure that sponsors and exhibitors are invoiced
 - Prepare exhibition floor plans, exhibitor manuals
 - Coordinate sponsor-related items on the congress website, printed announcements, final programme and other congress supplies
- Continuously review partner programme and update when necessary
 - Ensure that all sponsor activities are compliant and in agreement with the philosophy and vision of the ESTS
 - Maintain ongoing contract negotiations
 - Deliver all relevant information to sponsors/partners
- All year round, generate a monthly report to the Treasurer, Director of Annual meeting and Executive Director of all communication with existing and potential sponsors and supporters including: company and contact names and contact details, with a dated résumé of all communications
 - In the lead up to Annual Meeting, report sponsor statistics in relation to budget status and other financial issues, including insurance and VAT

Participants

The PCO should:

- Coordinate mailings (online and print) of announcements and programme (after delivery of programme drafts and proof-reads by ESTS), including the call for abstracts
- Provide Annual Meeting materials for the ESTS Website
- Maintain an online abstract management system in consultation with the Director of Annual Meeting
- Coordinate all print-, email-, web-, direct- marketing activities agreed upon
- Supply Board members with suitable slides and other promotional materials for the Congress
- Deliver registration statistics regularly to the Director of Annual Meeting from the opening of registration

Onsite/Online Management

The PCO will be responsible for:

- Management of the meeting site and the related services

- Coordination of the conference office, on-site registration, distribution of badges and conference documentation, hotel services, social events and general information
- Hiring, instruction and management of on-site staff
- Arrangement of signage + message centre
- Coordination of IT, Internet Café etc
- Arrangement and planning for security- and first aid measures (policy and plan) before and during the Annual meeting.
- Coordination of the slide preview centre
- Coordination of the poster exhibition, helpdesk, materials, etc.
- Staff timetable management
 - AV-technicians
 - IT-technicians
- Coordination of catering functions
- Handling of VIPs and speakers
- Handling of exhibitors and sponsors

Delegate handling

The PCO will:

- Establish registration fees by agreement with ESTS
- Prepare pre-meeting notices
- Provide on-line pre-registration
 - Apply pre-set registration periods (early, late and on-site etc.)
 - Apply pre-set registration types – if requested
 - Provide non-stop registration from the registration opening until the end of the congress/Regional Expert Meeting
 - Provide a link for the ESTS Website to on-line registration
 - Email relevant confirmations
 - Invoice and collect the registration fees
- Compile registration statistics and all required listings
- Produce badges to a standard, approved format (for all delegates including faculty, exhibitors, staff, etc.)
 - Enable group registration and group badge pick-up
- Perform book-keeping and transparent accounting of delegate fees (follow-ups and outstanding accounts for delegate fees)

Hotel Reservation Service

The PCO will:

- Evaluate a possible ESTS headquarter hotel
 - Negotiate best rates and conditions
 - Make all necessary hotel reservations for Board members and invited speakers and Chairs
- Administer hotel bookings for participants: booking of rooms, handling deposits, confirmations, changes etc.
 - Online handling of hotel reservation
 - Regular statistics on hotel bookings
 - Provide full hotel service on-site
 - Rental of meeting rooms if required
 - Onsite Hotel Management for last-minute requests

Social programme

The PCO will assist the Local Organising Committee to work within budget to:

- Research venues and suppliers
- Contract venues and suppliers
- Handle organisation pre-, on-site and post event for congress related events, such Board Dinner, Get-Together and Network Evening
- Coordinate the coffee-breaks and luncheons, among which the latter is paid by the attendees in site

Transportation

The PCO will:

- Coordinate a meet and greet service within the budget
- Coordinate signage at airport and train station within the budget
- Coordinate transport services within the budget
- Negotiate and coordinate official carrier agreements depending on size of congress

Exhibition Management

The PCO will:

- Establish an acceptable exhibition floor plan that gives easy access of delegates to all exhibitors, large and small and encourages the overall flow of delegates within the entire venue to areas of interest
 - If appropriate, investigate and plan catering areas within the exhibition plan
 - If appropriate, investigate and plan poster areas within the exhibition plan
 - Ascertain fire and building regulations and planning permits, necessary for the exhibition area
 - Negotiate an acceptable rental for the exhibition space
 - Agree arrangements for stands cleaning, general cleaning, garbage removal and security
 - Agree other matters pertaining to exhibition, e.g. water and waste
 - Agree setting-up and dismantling timetables
 - Prepare all the necessary signage
- Liaise with the Shell Scheme Company
 - Agree the floor plan and appropriate shell scheme requirements
 - Co-ordinate the set-up requirements of the shell scheme contractors with outside contractors employed by exhibiting companies
 - Monitor all electrical requirements and inform the appointed electrical contractor
 - Agree site management, set-up and dismantling schedules
- Exercise financial responsibility
 - Management of bank accounts, cash flow, taxes, preparation of accounts, etc.
 - Assist in arranging insurance coverage
 - Advise appropriate rental charges on a “per square meter” basis for the exhibiting companies
- Liaise with the Exhibiting Companies
 - Help with the design and printing of the exhibition brochure / manual, including terms and conditions of exhibiting, floor plan with stand costs, and reservation forms
 - Provide necessary information and appropriate booking forms concerning availability and setting of stands, shell scheme, electrical requirements, telephones,

hire of furniture, floral arrangements, photographers, etc. as well as any other special requirements

- Liaise with exhibiting companies' appointed interior contractors
- Agree access schedule with exhibiting companies
- Submit exhibition plans for approval in accordance with the appropriate licensing authority's fire and safety regulations
- Staffing and Security
 - Manage an exhibition office on-site throughout the exhibition
 - Appoint security staff and provide appropriate briefings
 - Manage ad hoc personnel
 - Issue exhibition passes and exhibitor badges

Lecturers' Service

The PCO will provide:

- Coordination of accommodation of invited speakers and chairs
- Coordination of AV/rehearsal/speakers ready room
- Coordination of dedicated on-site registration area
- Coordination of catering
- Technical coordination of poster session area

General Assembly

The PCO should provide:

- A dedicated member of staff present during the General Assembly, which normally lasts one hour. This will usually be face-to-face during the annual meeting.
- Assist the officers in creation of presentations, minute taking, vote counting and entrance controls

Program Committee meetings at the Congress

The PCO should:

- Have one dedicated staff member available for the (normally two) three-hour Program Committee meeting –on the day before the annual meeting.
- The ESTS will send agendas and provide the minutes.

After the Annual Meeting

Within 1 month of the Congress, the PCO should have:

- Collated the presentations from all speakers who have given their agreement, plus programme highlights ready for upload onto the ESTS Annual Meeting website.
- Provided the ESTS with contact information of all attendees and industry sponsors.
- Provided statistics on delegate participation for all conference events.
- Send evaluation questionnaires and attendance certificates to all attendees (face-to-face and online) and industry sponsors.
- Send thank-you letters to all speakers and chairs, in conjunction with the new President

Within 4 months of the Congress, the PCO should have:

- Paid all invoices, reimbursement claims and expenses, in close contact with ESTS.
- Prepared final accounts, based on the agreed budget.
- Assessed the marketing and promotion of the Annual Meeting.
- Analysed and summarised Annual Meeting attendees' and industry sponsors' evaluation questionnaires.

How to bid and the next stages

Deadline for proposals is 5th February 2024

All bids received will be examined by a selection panel, consisting of the ESTS Officers. Those considered appropriate will be asked to make a formal presentation (face to face preferred) to the selection panel on the morning of

25 May 2024 9:00 AM – 11:00 (Barcelona, Spain)

Please give the names and contact details of three organisations for whom you have worked previously, who we may contact for references.

Criteria for selection

There is no application form or fixed format for proposals; they must however be written in English. Please address the following issues, giving evidence of:

1. Previous successful PCO experience and ability to manage both in-person and virtual (online) medical conferences of a similar size and scope to the ESTS Annual Meeting:
 - a. Ability to manage sponsors
 - b. Expertise in successfully marketing conferences to achieve optimal delegate numbers and sponsors, with samples of promotional material
 - c. Managing and controlling budgets
 - d. List of current conference commitments
 - e. Approach to risk management, legal and insurance issues
2. Please provide an estimated budget for a three-day annual meeting with 1200-1500 participants and an exhibition with 4-6 large sponsors and 10-15 additional supporters having each a small exhibition. Total budget should include all online meetings costs plus estimated costs for a face-to-face element to each meeting. The estimated budgets should include an account of ALL estimated expenses that would be paid by the ESTS with the services described.
3. Effectiveness of organisational systems, e.g. staff experience, database capability and state of the art IT resources
4. How you might integrate future staff supported by ESTS, subject to funding.
5. Relationship 'fit' with the ESTS and ability to work jointly as needed on a day to day basis

Please give a general outline of your company, its history, philosophy, policies and industry accreditation, together with information on your:

1. Estimated fees and costs and breakdown of cost structure
2. Description of the proposed members of the team working for ESTS
 - a. CV of the person you would propose would be the project manager
 - b. Experience and proficiency in English of all involved
 - c. In-house technical team available (graphic design etc) and plans for any necessary out-sourcing
3. Insurance coverage
4. Policy on termination

The ESTS will be looking for financial stability in its PCO, so a copy of the latest published Report and Accounts should also be included, together with a copy of your latest terms and conditions of business.

We would be interested to hear any ideas you may have about how the ESTS can improve both its face-to-face and online meetings and increase its visibility and success in its mission, how we may attract more sponsors and how we may reduce our running costs.

Members of the selection panel are spread globally, so for this reason bids must be submitted electronically to the ESTS Secretary General. Bids received only by post will NOT be considered.

All bids received will be treated in the strictest confidence and no persons outside the ESTS Board of Directors will have access to them.

More information about the ESTS can be found on our website at:

<http://www.ests.org>

Alternatively, you are welcome to liaise with the ESTS President or Secretary General if you require clarification on any points prior to submitting a proposal.

President – Jozsef Furak jfurak@gmail.com

Secretary General – Hasan Batirel secretary.general@ests.org.uk

Appendix 1: Indicative time schedule for Annual Meeting/Educational Events Preparations

JANUARY PREVIOUS YEAR (at latest)		
Congress bidding round	ESTS	PCO
MARCH PREVIOUS YEAR		
First Announcement Printed	ESTS	PCO
Venue negotiation		PCO
Website announcement		PCO
SEPTEMBER PREVIOUS YEAR		
Agreement on sponsorship strategy, and PCO sending out sponsor invitations	ESTS	PCO
Meeting with Industry Partners	ESTS	PCO
Program Committee meeting	ESTS	PCo
OCTOBER PREVIOUS YEAR		
Minutes from Program Committee meeting		PCO
Accommodation booking system		PCO
Program at a Glance	ESTS	PCO
NOVEMBER PREVIOUS YEAR		
Arrangements for Program Committee February		PCO
Instructions for Authors	ESTS	PCO
Test Abstract Submission System	ESTS	PCO
DECEMBER PREVIOUS YEAR		
Abstract submission opens		PCO
Registration Platform opens		PCO
Draft 2nd announcement	ESTS	PCO
Scheduling of the scientific preliminary program, invitations of invited session Chairs	ESTS	PCO
Update on Industry		PCO
Invitations to reviewers for selection of topics	ESTS	PCO
Invitations to Postgraduate Course Captains and Experts	ESTS	PCO
JANUARY		
Abstract submission closes	ESTS	PCO
Allocation of reviewers to topics	ESTS	
Abstract reviewing opens		PCO
Update 2nd announcement		PCO
Application for Ethical MedTech		PCO
Application for CME		PCO
Graphics for app		PCO
Reminders deadline abstract reviewing		PCO
Invitations for Invited Guests	ESTS	PCO
Invitations for Society Representatives	ESTS	PCO
Update on Industry		PCO
	ESTS	
	ESTS	
FEBRUARY		
1st Budget agreement , incl reimbursement rules and possible invited	ESTS	PCO

speakers budget		
Final decision on venue for networking dinner	ESTS	
Kick off Meeting with App	ESTS	PCO
Pending confirmations from invited Chairs		PCO
Abstract submission closes		PCO
Export Scores of Abstract Reviewing		PCO
Preparation of February program committee meeting for selection of abstracts	ESTS	PCO
Update on budget		PCO
Update on industry contracts	ESTS	PCO
Notifying abstract authors accepted/not accepted		PCO
Abstract submission for Nurses/Allied Health Professionals closes		PCO
Export Nurses/Allied Health Professionals abstracts for reviewing		PCO
Minutes of February Program Committee meeting		PCO
Provide detailed contact details of all invited speakers (faculty list) to PCO	ESTS	
Design of invitation for Past President Dinner		PCO
Invitations for Past President Dinner	ESTS	PCO
MARCH		
Composition of preliminary scientific programme / delivery of the document to PCO	ESTS	
First draft of prelim. programme to be published on congress website		PCO
		PCO
Set-up details and calculation for social programme, incl. Networking dinner		PCO
Opening Ceremony details and organisation		PCO
	ESTS	
Emailing Early Bird Deadline		PCO
Registration invitations to be sent tspeakers/chairs of abstract sessions		PCO
Set-up room profile		PCO
2nd Budget agreement	ESTS	PCO
Update 2nd announcement	ESTS	PCO
Invitation Presidential Reception	ESTS	PCO
Further information for App	ESTS	PCO
Notifying Nurses/Allied Health Professionals abstract acceptance		PCO
Draft program for Nurses/Allied Health Professionals	ESTS	PCO
Finalise PGC Teams	ESTS	PCO
Design of Invitation for Presidential Cocktail		PCO
APRIL		
Update of preliminary scientific programme / delivery of the document to PCO	ESTS	
Upload of preliminary scientific programme on webpage		PCO
Export of Book of Abstracts		PCO
App review	ESTS	PCO
Invitations for Presidential Cocktail	ESTS	PCO
Update on industry contracts	ESTS	PCO

Follow-up with registration of chairs/speakers		PCO
	ESTS	PCO
		PCO
MAY		
Printing of pocket program		PCO
Book of Abstracts Final Version		PCO
App final review and launch	ESTS	PCO
Delivery of final program		PCO
E-mailing "Final Scientific Programme Online" to delegates (with disclosure for update)		PCO
Organise recoding of all specific sessions		PCO
Fine tuning of the social programme		PCO
Final tuning on technical equipment and online meeting platform		PCO
Final tuning for catering on-site		PCO
Final layout plan for poster exhibition		PCO
3rd Budget update emailed to accept by ESTS		PCO
Final design of small print items (speaker signs, certificates, name badges)		PCO
		PCO
Closure online pre-congress registration		PCO
Delivery speakers list to the speakers' hotel		PCO
Dispatch of sponsors flyers on-site		PCO
Dispatch of printed programme, bags, congress supplies etc. on-site		PCO

		PCO
ESTS CONFERENCE		PCO
JUNE		
Post-registration of participants on-site		PCO
Thank you letter to speakers and chairs		PCO
		PCO
E-mailing certificates of attendance incl. online survey to delegates		PCO
OCTOBER		
Evaluation results of online survey to ESTS		PCO
DECEMBER		
Submission of financial statement and report to ESTS		PCO

European Society of Thoracic Surgeons request for PCO services 2024-2026