

DEFINING ROLES

THE KEY TO ORGANISING A SUCCESSFUL MEETING

AS MANY OF US HAVE EXPERIENCED, ALL EVENTS AND CONFERENCES ARE DIFFERENT BUT ONE POINT REMAINS THE SAME, THERE ARE MANY PLAYERS INVOLVED. THIS WILL VARY DEPENDANT ON THE STRUCTURE OF THE HOST ORGANISATION BUT COMMONLY THERE WILL BE A BOARD, EXECUTIVE COMMITTEE, PROGRAMME COMMITTEE, CONFERENCE CHAIR, LOCAL ORGANISING COMMITTEE, SECRETARIAT OR HQ STAFF AND PCO.

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CONCORDE SERVICES AND AGS ARE CONGREX GROUP COMPANIES



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Ultimately all players have the same goal in sight - a well attended, high quality, financially successful event. It is realistic to expect that different players may place different weighting on certain elements of the event planning and structure and that each brings with them different areas of knowledge and expertise.

The key to success is building a team using the strengths of everyone to maximum effect. *It is easy to say but how is this achieved in practice?* In our opinion, it is to ensure from the outset that the roles and expectations of all parties are clearly defined, understood and agreed.

For the purposes of a short article, we can focus on two broad groups: the Association's Volunteer Leadership and Staff and their main roles when it comes to meeting organisation.

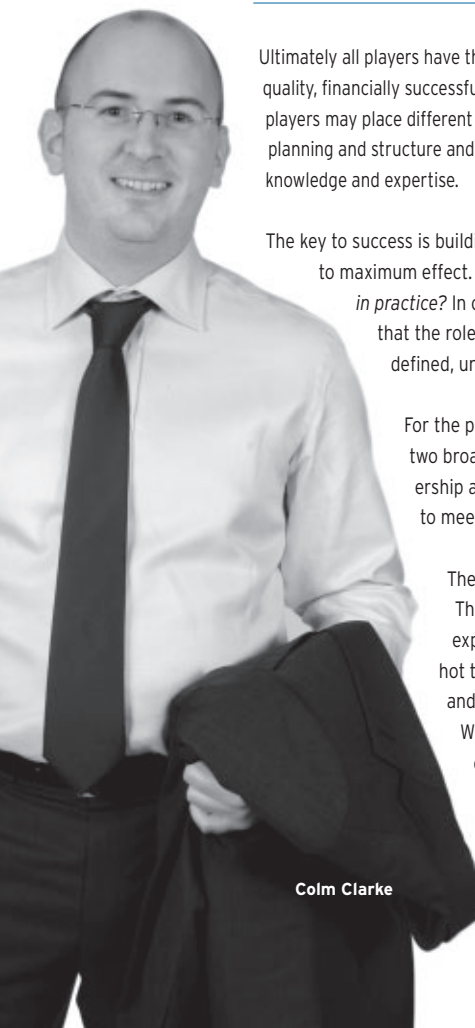
The Volunteers fulfill a range of essential roles. They are the association's subject matter experts who understand the current trends and hot topics that they want to see in a balanced and current educational/scientific programme. Within the Volunteer group may be the local organising committee, who bring expert knowledge on how best to present the destination, regional promotion and secure valuable support from the national and regional communities, as well as local

cultural awareness and protocol guidance, to enhance the image of the event both locally and to a wider audience.

The Staff group can consist of HQ staff/Secretariat and the PCO. The HQ staff/Secretariat have the most in depth knowledge of the Association, its governance, as well as its mission/objectives, the decision making process within committees and expectations from the event. The PCO brings the expertise in understanding congress logistical management inside and out including the expertise in managing venue requirements, supplier sourcing and negotiation, marketing and promotional knowledge, financial and budgetary management and general logistical coordination. The PCO fulfills the role of Project Manager, ensuring that timelines, financial parameters and specifications are met, as well as bringing the elements from the varying players together.

A successful way to bring all players together at the outset of the planning process and harness these diverse range of expertise is to create a framework. A framework can take various names; guidelines, planning handbooks, business plans, but whatever the name they should aim from the beginning to set out a number of criteria:

- + **Key Performance Indicators** - these must form the framework to guide all parties for the planning activities and define what constitutes a successful event. Define goals and activity categories; it should then be reasonably straight forward to assign owners, based on knowledge, experience and resources available.
- + **Clarification of Roles and Responsibilities** - who is responsible for doing what, when and understanding of financial considerations e.g.



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venue selection, programme content, social activities, budget and finance etc.

✦ **Communication plan** - it is essential that this is established at the outset to avoid the different players working in isolation on their element as a successful event is achieved through an integrated planning process.

It is a challenge for an organisation to ensure consistency from event to event when there can be many varying players involved. A way for an association to introduce continuity into the planning process is to appoint a core PCO. This brings continuum from one event the next when it is likely that player's such as Executive Committee, Programme Committee and Local Organising Committee will change from conference to conference. Having a core PCO enables the HQ staff and the PCO to develop a relationship over time that can be built on and avoids the wheel being reinvented for each event. A working partnership is formed that enables the PCO to gain a better understanding of the association, its needs and objectives and membership beyond simply the rudiments of the conference and its logistical planning, and the PCO can also be a valuable source of information transfer when new players join the team.

It is important to remember the conference, whatever its frequency, is often the main forum for existing members and new members to meet, network and exchange ideas, therefore ensuring consistency in branding and marketing of the event is important to promote that each event is being organised by the same association. The main attraction for attendees whether they are delegates or other supporting parties, irrespective of destination, is to have a clearly defined programme with content that is relevant, current and that fits with the strategic direction of the association and community it represents. The strength for an association comes from having a panel of real experts in the programme team.

It is essential for association to build and capitalise on the momentum that holding a conference brings and whilst having attendees attention to follow up either on site or post event and convert attendees into members.

Finally, it is important to acknowledge that holding an event is a major financial consideration for all associations. For many, the finances generated from a conference make a valuable contribution to the running costs of an association, and even if only

breakeven is the desired outcome, few associations want their events to make a loss. From the outset, we recommend setting out guidelines as to the financial expectations and make sure there is complete understanding of where the figures come from, especially where there is a profit split involved as this can be a thorny issue. It should be possible to make it a win-win for both the association and local organising committee. Give the budget management to the PCO and secretariat, as they are experts in this field and it can be useful to use the "independence" of the PCO to the advantage of the association.

In summary:

- ✦ Volunteers / Technical Experts - content focus and set KPIs
- ✦ Local Committee - destination "inside information", local support and awareness creating
- ✦ HQ / Secretariat - facilitator, strategic direction, provide communication and planning tools
- ✦ PCO - execute, organise, realize

Pulling the strengths from all players within a clearly defined framework and respecting each other's expertise is a sound approach to a successful and harmonious event.