ICLAM

International Committee for Insurance Medicine

founded in 1901

ICLAM CONGRESS GUIDELINES

www.iclam.org

ICLAM Congress Guidelines
ICLAM Board
Local Organizing Committee
Professional Congress Organizer

Version: July, 2013

ICLAM CONGRESS GUIDELINES

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1   INTRODUCTION

The objective of these guidelines is to provide ICLAM with a document which will:
- Assist national organizations in making the decision whether to invite ICLAM to hold a congress in their country;
- Establish a checklist of the organizational tasks connected with the preparation and realisation of an ICLAM Congress;
- Help to ensure effective communication and understanding between ICLAM and the responsible National Organizing Committee (NOC)
- Ensure continuity of traditions and ambience of the ICLAM congresses;
- Indicate some of the benefits to be gained from taking the advice of a Professional Congress Organizer (PCO), which is mandatory for every NOC;
- Define the roles of the representatives of ICLAM and the NOC in the organizing process.

The organization of the ICLAM Congresses every three years in different countries is an essential feature of the work of the ICLAM Board.

The arrangements are complex and lengthy, especially as over the years the ICLAM Congresses have assumed a distinct format of events which the participants have become used to, and which has proved to be in the best interest of delegates. This knowledge and experience should be shared with the host committee in the country where the ICLAM Congress is to be held.

Under these circumstances ICLAM has issued guidelines for the use of the NOC who wants to organize an ICLAM congress. These guidelines are intended to cover not only the organization of the ICLAM congress in general, but also the respective responsibilities of the ICLAM Board and the local committee with regard to such matters as finance, professional content, printing, pre-congress meetings, treatment of VIPs, etc. They also define matters on which consultation and co-operation between the ICLAM Board and the local committee is essential.

The ICLAM Board will not give detailed advice to host committees on matters on which Professional Congress Organizers (PCOs) are experienced and expert. The NOC is obliged to use the services of a PCO in order to meet the guidelines requirements of the ICLAM Board, and also to give to the congress the special national flavour which they obviously seek. The ICLAM Board strongly believes that the professional advice available from PCOs is a near-essential element in the organization of a successful ICLAM Congress.

2   GENERAL INFORMATION ABOUT ICLAM

2.1   ICLAM Board members

Fabrice Chouty, president@iclam.org
Pieter Coetzer, general-secretary@iclam.org
Detloff Rump, president-elect@iclam.org
Urs Widmer, treasurer@iclam.org
Robert Kneepkens, admin@iclam.org
Achim Regenauer, aregenauer@munichre.com
Zuzanna Guzel, zuzanna.guzel@allianz.pl
Gabriele Teichmann, Gabriele.teichmann@hannover-re.com
Website; https://www.iclam.org

2.2   ICLAM Congress presidents

Sydney 2001 : Detloff Rump
Venice 2004 : Arnoldo Capurro
Berlin 2007: Siegfried Akermann
Cape Town 2010: Pieter coetzer
Madríd 2013: Javier Aparicio
Maastricht 2016: Robert Kneepkens, kneepkens@iclam.org

2.3   History of ICLAM

The history of ICLAM started in 1899, when Dr.vE. Poëls, Chief Medical Director of Compagnie Belge d´Assurances Generales, organized the first International Congress in Brussels. At the congress, the attendees agreed to establish an international association. Thanks to Dr. Poëls, ICLAM was founded on September 24th 1901 in Amsterdam as the Association Internationale de Médecins Experts des Compangies d'Assurances (AIMECA). The founding meeting took place in the Aula of the University of Amsterdam, at the end of the Tuesday afternoon sessions of the second congress. AIMECA was an international association with national committees. Some of these committees still exist today, like the Dutch committee, now called GAV.

Since Brussels in 1899 the congresses were held every 2-3 years: 1901 in Amsterdam, 1903 Paris and 1906 Berlin; but 1909 Vienna had to be cancelled, as did the alternative 1910 Stockholm. The revitalisation of AIMECA after the Great War took a very long time, till 1931. ICLAM restarted in 1931 in Geneva under the title of Permanent International

Committee for the study of Life Assurance Medicine, with an International Committee of members. This committee in turn, appointed a Bureau in 1932 in Brussels to coordinate the activities of the Organization.

The congresses restarted in London in 1935. Under the direction of Dr. F. Kaufman in Zurich the acronym ICLAM, International Committee for Life Assurance Medicine, was brought into existence and the current structure of the organization was established. The next Congress was held in 1939 in Paris. The name of ICLAM later changed to International Committee for Life, Disability and Heath Assurance Medicine and eventually to International Committee for Insurance Medicine, but the acronym ICLAM still stands.

Over the years ICLAM, which started out as an European organization, has expanded to hold congresses outside Europe in keeping with its title. After America, Asia, and Australia, Africa was the last continent missing on the list. We have enjoyed the African hospitality at the ICLAM 2010, which was held in Cape Town.

At the congress in Scheveningen 1958 the Congress Logo was introduced and at the congress in Tokyo 1986 the Congress Flag and Banner. Since that year, every congress has its own banner. For the congress in The Hague 1989, the wives of the members of the ICLAM Bureau reconstructed all former banners, to present them in a parade during the congress. For the congresses before 1958, banners were designed. Since 1989, all banners are shown in the Auditorium at each ICLAM Congress. In 2012 the deteriorating Banners and flags were professionally photographed, and in 2013 the original flags were stored in Switzerland.

2.4 Objectives of ICLAM

The aim of ICLAM, previously known as the Permanent International Committee for the Study of Insurance Medicine founded in 1932 in Brussels, and later named International Committee for Life, Disability and Assurance Medicine, is the promotion of medical science in relation to Insurance Medicine.

ICLAM seeks to achieve this aim by:
- Organizing International Congresses for Insurance Medicine, with a focus on:
  - Life Insurances: Mortality risks; risk assessment and underwriting
  - Critical Illness: Underwriting; claims assessment, product design
  - Disability, Permanent Health Insurance: Claims assessment; underwriting, product design
  - Social Security & Income Protection: Claims assessment
  - Liability & Indemnity, Personal damage, Medical professional liability: Claims assessment.

- Establishing societies of Insurance Medicine in countries where none as yet exist.
- Promoting the teaching of Insurance Medicine and encouraging the scientific research into problems related thereto.
- Fostering the personal relations of its members.
- Assisting in any international problem concerning Insurance Medicine and, at the request of its members, in regional problems.

2.5   Structure of ICLAM

The management of ICLAM is vested in an executive committee, called the Board since 2013. Between 1932 and 2013 it was called the Bureau. The Board is made up of 6 to 9 Members; chosen by the Board on the basis of proven effort, of expertise and of resources. Each Board member is responsible for a Portfolio and can appoint a Portfolio Committee for support. The Bureau has an advisory role to the Board. No country may be represented on the Bureau by more than one member. The Members of the Bureau are elected by the National insurance organizations of each country that wishes to belong to ICLAM.

ICLAM also has an international general membership base that is open for any medical advisor, underwriter, claims assessor, new business manager, actuary, legal advisor, or any person actively involved in individual or group risk business, to join. Membership needs to be approved by a Board member.

The task of the Bureau member is:
- To maintain the contact with the national society of his county, where there is such a society;
- To get in touch with his colleagues interested in Insurance Medicine with a view to establishing a national society, where no such society exists;
- To be the contact between the Insurance Medicine interests of his country and the Board;
- To be spokesperson of his country in Insurance Medicine connections.

Members of ICLAM are Insurance professionals. Members of ICLAM are under no financial obligation, i.e. no membership fees apply. To cover the expenses of the Secretariat a minimal amount shall be charged to the NOC of each ICLAM Congress.

3   GENERAL INFORMATION ABOUT THE CONGRESS

Last ICLAM Congresses	Brussels 1982, Tokyo 1986, The Hague 1989, London 1992, Washington 1995, Budapest 1998, Sydney 2001, Venice 2004, Berlin 2007, Cape Town 2010, Madrid 2013
Future destinations and dates	Maastricht 2016
Objectives of the Congress	Presenting and discussing the advances of medical science in relation to Insurance Medicine
Official language for programme, papers, slides, abstracts, and all documents	**English**
Other languages	The NOC may provide simultaneous translation in the native language, but all presentations must be presented in the official language
Submission of invitation	At the ICLAM Board meeting at the beginning of an ICLAM Congress, at least six years before the Congress
First announcement to the Congress Delegates	At least three years before the Congress, with presentation, film, stand and flyers: at an ICLAM Congress
Financial responsibilities	*See chapter 4*
Eligibility of attendance	ICLAM Congresses are open meetings
Precedent for holding a trade or technical exhibition, or book displays	None
Other space requirements	Future host countries (see paragraph 3.4)
ICLAM Flags	All former ICLAM Flags must be displayed in any sizeable format deemed fit for the location according to the NOC.
Site visit	Exactly one year before the conference the ICLAM Board will visit the site (see paragraph 3.4)

3.1   Congress Format

From 1899 to 2004 it was a four day congress. Since 2007 it is a three day congress. ICLAM Congresses have a fixed framework. Within this framework the format should be regarded as flexible.

Four day congress : 3 day scientific programme

Day 1: Sunday
- **Morning**: Meeting ICLAM Board (6-9 persons) + lunch
- **Afternoon**: Meeting ICLAM Board and Bureau (16-50 persons) 13.00 – 14.00
  - Registration desk open in the afternoon
  - Optional: One-Day Seminar (separate registration) 9.00 – 17.00
- **Evening**: Opening Reception = Reception by National or local Authority (Mayor, State Secretary of Health, ...)

Day 2: Monday
- **Morning**: Opening Ceremony, Scientific programme starting with plenary sessions
- **Morning**: Complementary Tours for accompanying persons
- **Afternoon**: Scientific programme for participants
- **Afternoon**: Complementary Tours for accompanying persons
- **Evening**: Reinsurers night, sponsors are free to entertain their customers

Day 3: Tuesday
- **Morning**: Scientific programme for participants
- **Morning**: Complementary Tours for accompanying persons
- **Afternoon**: Complementary Tours for participants and accompanying persons
- **Evening**: Congress Banquet or Gala Dinner

Day 4: Wednesday
- **Morning**: Scientific programme for participants
- **Morning**: Complementary Tours for accompanying persons
- **Afternoon**: Scientific programme for participants, ending with plenary sessions
- **Afternoon**: Complementary Tours for accompanying persons
- **Afternoon**: Key note lecture and Closing Ceremony (plenary)

Day 5: Thursday
- ICLAM Board Tour – only open for ICLAM Board members

Satellite sessions
- Sponsors: in the Satellite programme on Day 2 in the afternoon, Day 3 morning and afternoon, and Day 4 in the morning.
- Optional: One-Day Seminar on Sunday

Scientific Programme
- Free format, a wide choice: plenary sessions, plenary symposia, concurrent sessions, concurrent symposia, workshops, round tables.

Exhibition
- The exhibition is being held during Days 2, 3 and 4.

3.2 Accompanying Persons' Programme

In the past approximately 15% of the participants have brought an accompanying person, officially attending the congress. **Many accompanying persons do not register**, but buy separate vouchers for social events.

A selection of tours should be organized, provided on a self-financing basis at the risk of the appointed PCO, to run during the congress during days 2, 3 and 4, as an inclusive package and to be sold as optional extras for accompanying persons.
At least two different Half Day Tours should be made available each time. If a tour is overbooked or severely under-booked, the Organization has the right to register the accompanying persons to other tours.

Opening Reception, Open en Closing Ceremony, all Half Day Tours and Reception by Authority (if separate from Opening Reception) will be included in the fees of the accompanying persons.

3.3 Pre & Post Congress Tours

There is no information about the use of the pre- and post-congress tours offers at previous congresses.

A selection of Pre- and Post-Congress Tours of a touristic nature should be organized, provided on a self-financing basis at the risk of the appointed PCO, to be sold as optional extras for accompanying persons and/or delegates.

The day after the Closing Ceremony, an ICLAM Board Tour of a touristic nature should be available for ICLAM Board members and their accompanying persons. Typically, this tour starts at 9.00, ends at 15 or 16.00, has a destination otherwise unavailable to the public and includes free drinks and a lunch of high quality. This tour can be made partially self-funded, and is used by members of the Board to evaluate and discuss the ICLAM congress just attended.

3.4 General requirements regarding selected topics

In this paragraph a number of rules are collected, that could otherwise be overseen.

Sponsors	Three main sponsor packages – Gold, Silver, Bronze – and a number of specific items for sponsoring.

Satellite providers	Gold, Silver, and Bronze sponsors will receive time slots in the Satellite programme, with a ratio (between each other) equal to the sums sponsored.
Satellite programme topics	Topics to be requested by the sponsors, but to be decided upon by the National Organizing Committee, to ensure a good link between the main programme (science, statistics and theory) and the satellite programme (practical application).
Presentation requirements	Speakers will use an ICLAM Congress template for their Powerpoint slides, and are not allowed to advertise in any way, except within the Satellite programme.
	Speakers are obliged to test their presentation on visual accessibility (colour blindness). ICLAM has tools for testing.
	Speakers must ensure that none of their material presented is protected by copyrights.
	Each presentation must contain: Potential conflicts; Learning objectives; Take home messages; References.
Publication of proceedings	All presentations must be made available to each registered delegate during the conference.
Tours	If lunch time is included in a complementary tour, the lunch should be included in the programme and the fee.
Site visit	The ICLAM Board (and partners) will vist the site exactly one year before the conference.
	Wednesday arrival, Thursday ICLAM business meeting, Friday joint meeting ICLAM and NOC (if necessary this will start Thursday afternoon), Saturday social events. No dinners at Wednesday and Saturday.
	Lunches open for ICLAM and NOC, dinners for ICLAM, NOC and partners. One dinner should be a test of the gala dinner at the location of the gala dinner.
	Travel and hotel costs are paid by ICLAM Board members personally. Meeting rooms, lunches and dinners on Thursday and Friday paid for by NOC. NOC may attract sponsors specially for the site visit.
	Discounts or free access to any of the services above must be equal to all of the ICLAM Board and the NOC, with the same special discount for low income countries.

4   DIVISION OF RESPONSIBILITIES BETWEEN ICLAM BOARD AND NOC

A clear definition of the respective responsibilities of the ICLAM Board and the NOC is essential and, once they are defined, it is essential that each party accepts its responsibilities. In broad terms the roles of the ICLAM Board are to co-ordinate policy and manage quality, whilst that of the National Organizing Committee is the logistical delivery of the congress.

The ICLAM and its members of the ICLAM Board and ICLAM Bureau are not liable in any way for financial losses or any other undesired results of the organized ICLAM

Congresses. The National Organizing Committee must accept all liability and is obliged to insure its members against liability.

Regular meetings should be held between the responsible bodies to review arrangements.

4.1 The ICLAM Board needs to approve the following issues, which should be organized and tabled by the NOC:

1. Local Legal Entity and Congress Presidency
2. Time-planning and meetings schedule
3. Proposals on programme policy and professional content
4. Financial policy and proposed budget
5. Trade or technical exhibition policy
6. Publications and mailings policy
7. Publicity policy & Marketing

4.1.1 Local Legal Entity and Congress Presidency

The ICLAM Board should approve the Local Legal Entity that will bear the financial and organizational risks of the Congress. The ICLAM Board needs to approve the President of the Legal Entity and NOC, who should be, in order of preference, the following:

- An ICLAM Board member
- An ICLAM Bureau Member
- Someone nominated by the local industry.

If the ICLAM Board agrees, the nominee will be appointed temporary member of the ICLAM Board for the three year period leading up to the conference in planning.

It is recommended that the structure of the NOC be organized as follows:

- The president should ideally be a medical advisor in the insurance industry, in full time employment of a direct insurer or reinsurer.
- The NOC should be managed by an Organizing Committee (OC), which would oversee and delegate functions to various sub-committees, and a Professional Congress Organizer.
- The OC should have representation for each of the top-level sponsoring companies, but care should be given to ensure that the OC has fair representation of medical

advisors, underwriters and actuaries.
- The following sub-committees are proposed:
  o <u>Scientific Programme Committee</u>. The chairman should be a full-time medical advisor, who should also be a member of the OC. This committee will finalise the scientific programme in co-operation with the ICLAM Board, arrange for speakers, and session chairmen. They will handle all communication with the speakers, obtaining presentations, the congress CD or flashdisk, printing of programs, etc.
  o <u>Social Events Committee</u>. The chairman should also be a member of the OC. This committee typically looks at accommodation, congress social events, transport and tours.
  o <u>Financial Committee</u>. It is recommended that the chairman should be an actuary or accountant. This committee will be responsible for obtaining sponsorship, drafting the budget and managing all accounts.

The NOC should decide on the final structure of their committees and keep the ICLAM Board informed.

4.1.2 Time-planning and meetings schedule

The ICLAM Board should be kept updated by the NOC with quarterly progress reports in terms of time-planning, progress to date, future meeting- and implementation schedules.

The ICLAM Board will, in the best interest of the success of the congress, approve and or advise the NOC on these matters.

4.1.3 Decisions on programme policy and professional content

- The ICLAM Board typically provides the NOC with a proposed list of topics and international speakers.
- The NOC then needs to obtain speakers for the proposed topics, and draft a provisional scientific programme.
- Up to 50% of the speakers may be allocated to local speakers.
- Changes to the proposed topics are allowed with approval from the Board.
- The NOC can decide which topics to assign to plenary sessions, and which ones to concurrent workshops.
- A list of standby topics with presenters should be arranged for late cancellations of confirmed speakers.

The NOC needs to decide on the following:

- Honoraria, expenses for hotels and travel reimbursements may be negotiable for speakers from outside the insurance industry, and these fees should be paid by the NOC, or by sponsors if agreed upon. The same principle applies to registration fees.
- The NOC should consider if speakers and moderators from within the insurance industry may qualify for a discount or free registration.
- The NOC should consider if ICLAM Board members and members of the NOC and sub-committees may qualify for a discount of the registration fee. This discount should be the same for all those concerned, and must take into account the special discount for low income countries. Free registration for those officials is not permitted.

The following responsibilities are allocated to the NOC:

- Invitation of speakers
- Invitation of chairmen and moderators
- All correspondence with speakers, chairmen
- Meeting delivery timelines for speakers' presentations.
- Briefing of speakers & chairmen
- Obtaining written consent from speakers to publish PDF-files of the presentations.
- Organizing abstracts, pre-prints, programme brochures
- Collating all presentations on flash-disk or CD or other digital medium to be handed to delegates during or immediately after the congress.
- Ascertain on-line availability of presentations after congress: directly for participants, after 6 to 12 months for ICLAM members, after 1 to 2 years for non-members. Typically this will be at the first of January if the conference was held in the first half of the year, and at the first of July if the conference was held in the second half of the year.
- Ensuring that speakers do not contravene copyright issues.
- Ensuring that speakers include: Potential conflicts; Learning objectives; Take home messages, to enable the participants and certifying agencies to evaluate the presentation afterwards.

4.1.4 Financial policy and approval of budget

Clear guidelines are essential. Questions of financial policy are best agreed at the earliest possible date.

The ICLAM Board will advise the NOC on the following policy matters

Responsibility for compiling	NOC

the budget	
Responsibility for approving the budget	ICLAM Board, and NOC
Responsibility for approving the budget inclusions/exclusions/changes	ICLAM Board, and NOC
Who approves the accounts?	NOC
Responsibility for a financial deficit	NOC
Who benefits from a surplus?	The National Association(s) or the body that underwrites the finances. Thirty percent of the surplus (if any) must be paid to ICLAM.
Is there a per capita or other levy to the ICLAM Board and when is it due?	The current per capita fee is **€ 50**, but will be discussed for every congress, payable after the congress.
Approval of the registration fees (in euro)	ICLAM Board
Extent of insurance required, and responsibility	*See the document on Security*; NOC
Availability of funding for early cash flow needs	NOC is responsible for the funding and the liquidity budget
Signatories of congress contracts (PCO, venue, caterers, hotels, interpreters)	Local Legal Entity, founded by the NOC for the specific congress
Regularity of budget up-dating	Quarterly
Auditing requirements	The ICLAM Board will audit the NOC and the Financial Committee every year, starting five years before the congress; Two years before the Congress all committees will be audited; One year before the Congress the ICLAM Board will meet at the Congress Venue for a Site-Inspection.
Special category guests whose expenses need to be included in the budget	**None**
Special category delegates with lower registration fees	Delegates from Eastern Europe, Africa, South-America, according to the IMF World Economic Outlook at http://www.imf.org/external/pubs/ft/weo/2012/02/index.htm.
	Honoraria, expenses for hotels and travel reimbursements may be negotiable for speakers from outside the insurance industry, and these fees should be paid by the NOC, or by sponsors if agreed upon. The same principle applies to registration fees.
	The NOC should consider if speakers and moderators from

	within the insurance industry may qualify for a discount or free registration.
	The NOC should consider if ICLAM Board members and members of the NOC and sub-committees may qualify for a discount of the registration fee. This discount should be the same for all those concerned, and must take into account the special discount for low income countries. Free registration for those officials is not permitted.
Is the spouse fee set at "break-even" or increased to support congress funds, or is it subsidised	Break-even
Responsibility for the cost of the ICLAM meetings: Board, Board plus NOC, Board plus Bureau	NOC will see to the costs of the meeting rooms, audiovisual equipment, technical support, refreshments and lunch for ICLAM Board and NOC.
Responsibility for the cost of visits to the host country by representatives of the ICLAM Board	NOC will see to every site-Inspection, except for the travel costs. Travel costs will be paid by the ICLAM Board members or their employers. See detailed description in paragraph 3.4 for the site visit one year before the conference.
Responsibility for the cost of the tour of the ICLAM Board and partners after the conference	The Board members will pay for their own costs.
Acceptability of commercial sponsorship; overall responsibility for it	Acceptable and the responsibility of the NOC
Financial responsibility for technical tours	NOC; no precedent yet
Appeals Fund to be launched, national and/or international	No
Established list of people to be approached	Each National Association has it's own list; the ICLAM Board will assist with a web-based international list
Overall responsibility for the Appeals Fund	If and when applicable, the ICLAM Board

4.1.5 Trade or technical exhibition policy

Trade or technical exhibition	Yes

Should it be a source of income to the congress	Yes
Responsibility of the National Organizing Committee or delegated to a Professional Exhibition Organizer (who may well be the appointed PCO)	NOC, which may delegate the responsibility to the PCO
Should this be for a fee with the risk undertaken by the congress, or should the financial risk be taken by the PCO/PEO?	Depending on the conditions, to be decided by the NOC
Who arranges for a customs clearance office?	NOC
Which sponsors will be offered an area as part of the package?	All main sponsors: Gold, Silver, Bronze, with the size and location of the area depending on the level of sponsorship.
To whom will be offered a free area?	The NOC of the next ICLAM, at the best location, near the Gold sponsor(s).
Are there requirements regarding the location of the exhibition area?	Yes: an area where all participants pass when entering or leaving the premises, where the coffee breaks are held and (the network) lunch is served (standing/walking lunch).
Are there requirements regarding the number and duration of the periods the exhibition area can be accessed?	Yes, the area should be open (and coffee or refreshments served) at all breaks and during the scientific programme. Breaks should be held very regularly and must last long enough. On Day 2 and 4 the total break time must be between 30 and 40% of the total duration of the Scientific Programme. On Day 3 the total break time will not include lunch and must be between 20 and 30% of the total duration of the Scientific Programme.

4.1.6 Publication and mailings policy

It is in the best interest of the NOC to ensure an effective publications and mailing strategy to maximise attendance figures.

The NOC must keep the ICLAM Board informed on:
- Timetable of deadlines for printed material
- Mailing lists to be used for each publication, e.g. via national associations or individual mailings

- Possible method of distribution
- Checklist of publications :
  - First Announcement
  - Preliminary Announcement
  - Registration papers with Final Announcement and Abstract Form
  - Final Programme
  - Book ,CD-Rom or other storage device with Abstracts
  - Book, CD-Rom or other storage device with Proceedings
- Internet homepage:
  - The NOC can make use of a special ICLAM-website at https://congress.iclam.org starting one month after the previouw congress.
- The webmaster of the NOC will get all administration rights needed to set up the local congress website.
- The Services Portfolio Committee of ICLAM will assist the webmaster and expand the technical possibilities if needed by the NOC, within the boundaries set by ICLAM. All delegates should register online via the ICLAM website. Registration must include permission by each delegate to send a post-conference electronic survey to their e-mail addresses, for purposes of obtaining feedback on the conference. This database will remain the property of ICLAM.

4.1.7 Publicity policy & marketing

The publicity policy resides with the NOC. They need to consider using the local press, local insurance industry, e-mail databases and/or other forms of advertising.

The ICLAM Board will assist as much as possible in this regard, e.g. using the existing ICLAM e-mail database and the ICLAM website. ICLAM Bureau and Board members will actively promote the conference in their own countries and industries, and ICLAM will use their contacts with other insurance bodies to the same effect, e.g AAIM, AMCAP, DVFVW, AIMAV, AIMA, CEECLAM, etc.

4.2 Responsibilities of the NOC / Local Legal Entity, and Conference checklist

In most cases, the Legal Entity will have the same members as the NOC. It is however the Legal Entity that is responsible for contracts etcetera, and not the NOC. The following checklists reflect normal procedures and need to be reviewed by each Legal Entity and by the NOC:

1. Financial control, budget and keeping of accounts
2. The venue - meeting halls, equipment, contracts, logistics and use of space
3. Staffing on site, supervisors, technicians, registration and information staff, interpreters and translators
4. Registration of delegates
5. Social programme events and tours
6. Hotel (and university/college) accommodation schemes
7. Organization of technical exhibition, book displays and raising of sponsorship
8. Security
9. Processing, production and distribution of documentation both pre- and during congress
10. Technical tours programme
11. Language services management - translation and translators
12. Promotion and publicity, setting up of a website for promotion, programme and receiving registrations and abstracts

4.2.1 Financial control, budget and keeping of accounts

- Drafting a budget
- Opening bank accounts
- Checking compliance with local or government tax law commitments
- VAT (or similar tax) implications
- Keeping books of accounts
- Monitoring cash flow and funding accounts
- Checking bank statements, invoices and paying accounts
- Monitoring expenditure within the approved budget
- Control of financial contributions fund, and sponsorship funds
- Receiving registration fees and other income
- Monitoring non-payments
- Advice on insurance needs (Public Liability and Abandonment)
- Advice on transfer of funds (country to country)
- Investment of surplus funds for revenue

4.2.2 The venue

- Recommendations of appropriate venue(s)
    - Venue contract, negotiation and agreement
    - Allocation of space
    - Scientific programme (spoken and poster)

- Social events
- Desks for registration, enquiries, travel, speakers, social events, recordings,
- Proceedings, tours, bank, theatre, congress "shop", post office
- Seating areas
- Catering needs
- Secretariats - international, national, scientific
- Press liaison
- Speakers preview room
- Publisher's office
- President / chairman's hospitality office
- Pre- and post-congress storage
- Trade and/or technical exhibition
- Book displays
- Scientific programme/technical back-up
- CME accreditation procedures and guidelines
- Acceptable presentation electronic formats for speakers
- Distribution system of presentations at venue
- Projection, video, microphones, public address, electronic voting
- Technicians
- Speakers' briefings
- Presentation preview system
- Notes for speakers
- Poster sessions
- Support, format, and notes for poster presenters
- Venue support, directional signs, stage sets
  - Directional signs
  - Electronic message system
  - Stage sets, lecterns and screens
  - Flowers and plants
  - Setting-up and breaking down
  - Internal TV circuit
- Equipment and furniture
  - Equipment: PCs, monitors and printers
  - Secretariat needs, supplies of stationery, photocopiers
  - Office furniture, refrigerators, lockable cupboards
  - Setting-up and breaking-down
  - Communication lines, voice and data transmission
  - Fax- and photocopying facilities

- Wi-Fi facilities for delegates, or Business lounge, or Internet Cafe
- Catering
  - Space requirements
  - Choice of menus and wines
  - Costs and contracts
  - Catering schedules and timetables
- Liaison with organizers of satellite meetings

4.2.3 Staffing on site

- Registration and information staff: uniforms, timetables, contracts and tax
- Secretariat, timetables and contracts
- Catering supervisors
- Ushers
- Security staff
- Porters, electricians
- Pre-congress briefing for all staff
- Provision of timetables, schedules, instructions for all staff
- Staff refreshments

4.2.4 Registration of delegates

- Advance registrations
  - Receipt and monitoring of registration fees
  - Facilities to do online registrations
  - Facilities to receive registration fees by bank transfers or credit card payments
  - Facilities to issue invoices to companies sending delegates
  - Group registration requirements
  - Maintenance of registration fee bank account
  - Issuing of confirmations and receipts
  - Handling cancellations and refunds
  - Collecting unpaid fees
  - Repayment of overpayments received
- Onsite registration procedure
  - Setting up computerised systems
  - Organization and supervision of delegate kit packing, badge production, pre-ordered tickets

- Language allocation for tickets and print
- Delegate bags should contain at least printed scientific and social programmes, flash disk with all presentations, delegate list
- On-site registrations
  - Setting up desk registration system
  - Cashier arrangements
  - Payment of expenses to speakers
  - On-site ticketing, name badges, distribution of delegate material/kits
  - Addendum to participant list

4.2.5 Social programme

- Overall responsibility for programme choices: welcome reception, concert, dinners, gala
- Financial responsibility
- Procedures for opening and closing ceremonies
- Guests and VIP lists (local and international)
- Official functions: open or closed events
- Other official functions: President's lunch or dinner, government hospitality, executive or speakers' events
- Accompanying guests' programme
- Pre- or post-congress tours
- Related social events: hospitality by Embassies, exhibitors, and sponsors
- Transportation

4.2.6 Accommodation scheme - hotels and colleges

- Range of hotels to be offered in different price categories
- Agreement/contract with hotels and universities/colleges
- Liaison with hotels, etc., notification, rooming lists, deposits, cancellations
- Advance hotel accommodation booking
  - Speakers and VIPS requirements
  - Industry requirements
  - Receipt and monitoring of payments fees
  - Issuing of confirmations and receipts
  - Handling cancellations and refunds
  - Collecting unpaid fees
  - Repayment of overpayments received

4.2.7 Security

- On site
- Offices
- Security police, guards
- Security scanning, arches
- First Aid

4.2.8 Production and distribution of documentation pre- and during congress

- Creation of logo and choice of colour scheme and image for print
- Design of layout
- Standard and extent of each print item
- Collation and production of "copy" for each print item
- Translation of "copy" for each print item into the agreed official languages
- Establishing and maintaining print deadlines
- Proof-reading in all languages
- Liaison with printer on deliveries
- Liaison with printer and packers on distribution both pre-congress and for congress
- Production and distribution of proceedings
- Production of participant list

4.2.9 Technical tours programme

- Choice of visits and hosts
- Invitations and ticketing
- Liaison with hosts
- Arrangements, buses, guides, meals

4.2.10 Language services management (Optional)

- Appointment of professional translation company
- Progress of language print: proof-reading and deadlines
- Appointment of professional simultaneous interpretation team

- On-site arrangements for interpreters

4.2.11 Promotion and publicity

- Agreement on mailing lists
- Choice of advertising media
- Liaison with journal editors re editorial
- Management of mailings and postal rebate system
- Research on related associations and congresses for additional distribution of publicity material
- Attendance and promotion at related congresses

4.2.12 Press

- Accreditation
- Advance newsletters
- Press releases
- Press briefings
- Press officer
- Post-congress press releases
- On-site arrangements

5   IMPRINT

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