

**SLEP tender for PCO services 2018**

5 proposals were recieved. One proposal did not include Adminisitrative service, so it was not considered.

The other 4 proposaals are summarised below

		ESA	Eventual	Fase 20	MCI
	<b>2.1.4. General Information and Experience</b>				
a)	Describe your Company's structure and organizational composition, as well as staff experience	<ul style="list-style-type: none"> <li>•Description of structure OK.</li> <li>•Staff partially described.</li> <li>•Presence in Argentina, Brasil, Chile, Colombia, México, Panamá, Perú and Uruguay.</li> <li>•Experience in meeting organizing OK.</li> <li>•Experience in administrative management not described.</li> </ul>	<ul style="list-style-type: none"> <li>•Description of structure OK.</li> <li>•Staff fully described.</li> <li>•Presence in Chile.</li> <li>•Experience in meeting organizing OK.</li> <li>•Experience in administrative management OK.</li> </ul>	<ul style="list-style-type: none"> <li>•Description of structure OK.</li> <li>•Staff partially described.</li> <li>•Presence in Argentina and Spain.</li> <li>•Experience in meeting organizing OK.</li> <li>•Experience in administrative management Ok.</li> </ul>	<ul style="list-style-type: none"> <li>•Description of structure OK.</li> <li>•Staff fully described.</li> <li>•Presence in Argentina, Brasil, Chile, Colombia, and worldwide.</li> <li>•Experience in meeting organizing OK.</li> <li>•Experience in administrative management not described.</li> </ul>
b)	Provide details as to membership of conference or	ICCA, World PCO alliance and SITE	ICCA, MARITZ	ICCA, local Bureau Buenos Aires and Spain	ICCA, and several worldwide
c)	Describe your company's experience in organising medical/scientific international congresses of similar scope and size to SLEP in Latin America; please provide the list of International associations where you serve as PCO	<ul style="list-style-type: none"> <li>•Melanoma World Society, Brasil 2018, 500 delegates.</li> <li>•Upcoming: International Pediatric Association, Panamá 2019, 3500 delegates. International Conference on Oral and Maxilofacial surgery, Río 2019, 2000 delegates.</li> </ul>	<ul style="list-style-type: none"> <li>•Asociación Latinoamericana de Diabetes, Santiago de Chile 2010, 1600 delegates.</li> <li>•Latin American Society of inmunodeficiencias, Santiago de Chile 2013, 700 delegates.</li> <li>•Asociación Latinoamericana de Nefrología e Hipertensión Arterial, Santiago de Chile 2014, 800 delegates.</li> <li>•Asociación Latinoamericana para el estudio del hígado, Santiago de Chile 2016, 700 delegates and 2018 Punta Cana, 800 delegates.</li> <li>•Upcoming: Hepatología México 2019 and Brasil 2020, Nefrología Mexico 2020.</li> </ul>	<ul style="list-style-type: none"> <li>•2as. Jornadas de la Sociedad Argentina de Endodoncia, 2018 – Buenos Aires</li> <li>•Congreso Wista, Buenos Aires, 2018</li> <li>•IUNS-ICN 2017 Congress, Buenos Aires, 2017</li> <li>•FAO-IFDC 2017 Conference, Buenos Aires, 2017</li> <li>•Conferencia Temática IMC, Lima (Perú), 2016</li> <li>•ISIN Toluca (México), 2016</li> <li>•ISIN Rio Janeiro, (Brasil) 2015</li> <li>•Cong. Sociedad Argentina de Nutrición, Mar del Plata, 2015.</li> <li>Upcoming: Congreso Soc. Paraguaya de Médicos de Atención Primaria, Asunción, 2019; Congreso Mundial Endodoncia (IFEA WEC), Buenos Aires 2022</li> </ul>	<ul style="list-style-type: none"> <li>•16th World Congress of Cardiology, Buenos Aires 2008, 17,000 delegates.</li> <li>•Latin American Congress on Vulvovaginal Pathology, Buenos Aires, 2013, 400 delegates.</li> <li>•Sociedad Chilena de Hematología &amp; American Society of Hematology, Santiago 2013, 600 delegates.</li> <li>•International Association for the Study of Pain, Buenos Aires 2014, 5000 delegates.</li> <li>•Latin American Association of Coloproctology, Asunción 2017, 1000 delegates</li> <li>• Upcoming: World Muscle Society, Mendoza; International Federation of Head and Neck Oncology Societies, Buenos Aires; Interational Society for Infectious Diseases, Buenos Aires, etc.</li> </ul>
d)	Describe your company's system of working around Latin America in different countries	Partial description	OK, cooperation with local PCO	Not described	Partial description
e)	Describe your experience in increasing congress attendance. How was this goal achieved?	Not described	Partial description	Partial description	Full description Ok
f)	Describe your experience in increasing congress sponsorship. How was this goal achieved?	Not described	Partial description	Partial description	Full description Ok
g)	Describe your modus operandi and proven experience in emergency management, e.g. in times of strikes, world events or natural disasters?	Not described	OK	Not described	Full description Ok
h)	Describe the new technologies you have used (apps etc.) in program organization and the general evolution of their use at the meeting you organize	OK	OK	OK	OK

	<b>3.2.1. Information concerning the situation of the service provider and information and formalities necessary for the evaluation of the minimum economic, financial and technical capacity required</b>				
a)	Companies submitting tenders will need to demonstrate previous experience in the following areas:				
a.1)	• secretariat services to biomedical societies	Not described	Core PCO of Asociación Latinoamericana para el estudio del hígado from 2014; Asociación latinoamericana de nefrología pediátrica; Sociedad chilena de cirugía de cabeza y cuello	Core PCO of: SEMERGEN Nacional ; Sociedad Española de Fertilidad; International Society for Immunonutrition, Sociedad Española de Rehabilitación y Medicina Física, Sociedad Española de Urgencias Psiquiátricas, Federación Española de Sociedades de Nutrición, Dietética y Alimentación, Sociedad Andaluza de Hipertensión, Sociedad Andaluza de Cardiología, Sociedad Andaluza de Médicos de Atención Primaria, Asociación Madrileña de Cuidados Paliativos	Partial description: ISPE China, ILCA Europe, ICSA, SLA, ISC2
a.2)	• management of web sites and publication of newsletters	Not described	OK	Ok	Ok
a.3)	• development of commercial input into biomedical societies	Not described	Partial description	Partial description	Ok
a.4)	• provision of advice on legal, governance good-practice and financial issues	Not described	Partial description	Partial description	Ok
b)	Legal position	Not provided	Fully described	Provided before signature of contract if selected	Fully described
c)	Economic and financial capacity	partially described: 2,5-7,5 million USD revenue 2013 to 2017	Fully described: Assets approx 650.000 USD	Provided before signature of contract if selected	Fully described
d)	Technical capacity	OK for meetings, not described for administrative management	Ok for meetings and administrative management	Ok for meetings and administrative management	Ok for meetings and administrative management
	<b>Financial Proposal</b>	•Administrative management approx 56.000 USD/year. •Meeting organization approx 130.000 USD each.	•Administrative management approx 22.000 USD/year. •Meeting organization approx 30.000 USD each + 10% of all income.	•Administrative management no cost. •Meeting organization 10% of all income	•Administrative management approx 45.000 USD/year. •Meeting organization approx 30.000 USD each + 10% of all income.



# SOCIEDAD LATINOAMERICA DE ENDOCRINOLOGÍA PEDIÁTRICA

July 2018

## TENDER FOR CORE PCO SERVICES

The Sociedad Latinoamericana de Endocrinología Pediátrica (SLEP) is conducting a tender process for Core Professional Congress Organization (PCO) services for 2019-2021.

### 1. CONTRACTING AUTHORITY

#### 1.1 OFFICIAL NAME AND ADDRESS OF THE CONTRACTING AUTHORITY:

Sociedad Latinoamericana de Endocrinología Pediátrica (SLEP)  
Att: Prof. Dr. Rodolfo Rey  
Centro de Investigaciones Endocrinológicas “Dr. César Bergadá” (CEDIE)  
Hospital de Niños Ricardo Gutiérrez,  
Gallo 1330 - C1425EFD Buenos Aires - ARGENTINA  
Tel.: +54-11-4963-5931  
E-mail: [secretary.general@slep.com.br](mailto:secretary.general@slep.com.br)

### 2. OBJECT OF THE CONTRACT

#### 2.1. DESCRIPTION

##### 2.1.1. Title attributed to the contract:

Core PCO services, including Association Management and Strategic Development services.

SLEP, the Latin American Society for Paediatric Endocrinology, was founded in 1986. The society's main goal is to integrate scientists of Latin America involved in basic and clinical research related to the field of paediatric endocrinology.

SLEP currently has ≈ 250 members and 700 attendants to the annual meeting.

##### 2.1.2. Description/object of the contract:

###### a. Administrative Management:

###### a.1. *Secretariat Services:*

- a) Part-time single named Operating Officer should provide association management services, taking care of all day-to-day issues, including handling enquiries from SLEP members. The Operating Officer should report to the SLEP Secretary General and Treasurer not less frequently than on a weekly basis;
- b) Prepare agendas, attend and take minutes at Council Meetings (2 per year) and the Annual Business Meeting (1 per year);
- c) Circulate agendas and minutes;
- d) Make local arrangements for Council meetings,
- e) Organize election procedures for Secretary General, Treasurer and Committee chairs;
- f) Management of grants and prizes;
- g) Provide dedicated telephone number and e-mail address.



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- h) Support Committee chairs (8 Committees) in the preparation of Committee reports (2 per Committee per year).

## ***a.2. Membership Handling:***

- a) Send out membership renewal notices and reminders (x 2 if needed);
- b) Manage and collect SLEP subscriptions in US dollars. Pay into SLEP bank account (presently in Chile);
- c) Deal with members queries including change of details, addresses, e-mail changes, new membership applications;
- d) Manage electronic SLEP membership directory;
- e) Manage membership portal, logon and authentication.

## ***a.3. Communication:***

- a) Update SLEP web site;
- b) Arrange electronic SLEP Newsletter (2 issues/year, 2-4 pages/issue) and email alerts (12 alerts/year) and send electronically to SLEP membership.

## ***a.4. Strategic Development:***

- a) Provide advice for organising and managing Committees;
- b) Establish with Secretary General and Council: strategic aims and priorities of SLEP, plan for increasing membership, plan for marketing of the Society, plan for increasing sponsorship.

## **b. Annual Meeting:**

### ***b.1. General Coordination and interaction with SLEP***

- a) Interacting with - and reporting to - SLEP council, SLEP POC and SLEP Finance Committee; staff and resources to be available throughout the annual meeting and year-round; whether designated persons will be in charge of the interaction and how they will be selected.
- b) Setting up an overall plan for the meeting, including all timelines.
- c) Reporting on progress and on deviations from the plan, especially where there are budget implications.
- d) Signing all contracts and agreements on behalf of SLEP, after approval by the society.
- e) Interacting with the Secretariat Service company appointed by SLEP or serving as both PCO and Secretariat Service company for SLEP.

### ***b.2. Meeting budget***

- a) Evaluating candidate cities and meeting venues and formulating an estimate of the budget at the time of the meeting planning (i.e. 2 years ahead of time).
- b) Ensuring that risk analysis is undertaken and continuously revised for each meeting and that the meeting is adequately insured before any financial commitment is made.



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- c) Monitoring and revising the budget at least yearly before any major financial commitments are made and presenting the budget to SLEP for approval.
- d) Receiving and recording all income for the meeting.
- e) Making and recording all payments for the meeting.
- f) Producing interim and final accounts as soon as possible after the meeting and remitting the interim and final payment to SLEP.

### ***b.3. Establishment of the Scientific Program including abstract handling services***

- a) Providing assistance to the POC at all steps of the establishment of the scientific program including call for suggestion by SLEP members, processing of the suggestions, preparation and organization of POC meetings, interaction with POC members for the establishment of the scientific program.
- b) Handling all correspondence with invited speakers, including call for abstract under the direction of the POC.
- c) Handling all reimbursement of speaker expenses based on established rules by POC and Finance Committee.
- d) Handling the call for abstract, including instructions and providing an online abstract processing system with the facility for online submission, review, marking and management
- e) Managing the evaluation of abstracts and assignment of abstracts to the various categories of presentation, in liaison with the POC.
- f) Advising authors of outcome of abstract submission and providing instructions for presentation.
- g) Supplying the abstracts in an appropriate form (either paper, electronic or online) in collaboration with the POC.
- h) Handling all correspondence with moderators, under the direction of the POC.
- i) Interacting with the POC for room allocation, based on expected attendance to meeting sessions.
- j) Continuously updating the program for online dissemination and closely interacting with POC on any last-minute changes before the meeting.
- k) Providing feedback on session attendance and delegate satisfaction promptly after the meeting, under the guidance of POC.

### ***b.4. IT activities***

- a) Designing and setting up a web site for the meeting with full information on the programme, location, venue, online registration and abstract submission pages.
- b) Updating the site promptly and regularly.
- c) Ensuring that there are links from the SLEP website to all relevant parts of the annual meeting site.
- d) Keeping the site available for at least one year after the meeting.
- e) Providing online poster-viewing (should include discussion of copyright issues, options for access and monitoring of use).
- f) Providing internet access to delegates during the meeting.



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g) Providing online or app-type facilities for meeting delegates to navigate through the program, view abstracts and establish their preferences for attending sessions, at least two weeks before the meeting.

### ***b.5. Registration services***

- a) Providing online registrations for all categories of delegate.
- b) Sending out acknowledgements of registrations, dealing with delegate enquiries.
- c) Managing all aspects of registration on-site, including handling late registrations.
- d) Providing and distributing tickets, badges, congress bags at registration and ensuring that this process is fluid when the meeting opens.
- e) Provide certificates of attendance as needed.
- f) Providing feedback on progress before the meeting and reporting final numbers to SLEP promptly after the meeting, including statistical analyses as per SLEP requirements.

### ***b.6. Exhibition and Sponsorship Services***

- a) Evaluating candidate cities and meeting venues and reporting to the POC and to Council on suitability at the time of the meeting planning (i.e. 2 years ahead of time).
- b) Managing all liaisons with the venue and local suppliers (including catering, transport, etc.).
- c) Reporting promptly on any changes, especially if they have budget implications.
- d) Managing all aspects of the meeting on site, including the exhibition.
- e) Managing arrangements for ancillary meetings, e.g. board meetings, special interest group meetings etc., as per SLEP council instructions.
- f) Establishing a list and pricing of sponsored items, in collaboration with SLEP.
- g) Producing a prospectus and all documents needed (floor plans, prices etc.) for liaising with exhibitors and Finance Committee in due time to ensure early commitment to exhibition space, satellites slots and all sponsored items. Organizing regular meetings with Finance Committee and sponsors to review and distribute sponsored items. Promoting the use of all sponsored items.
- h) Promoting the identification of new commercial partners and taking responsibility for the sponsorship effort with these companies, in collaboration with the Finance Committee.

### ***b.7. Delegate accommodation***

- a) Setting up arrangements with hotels at a range of prices and managing all accommodation bookings and enquiries for delegates, speakers and officers.
- b) Negotiating favourable prices at hotels, for approval by SLEP.
- c) Taking full responsibility for costs and risks associated with accommodation management.
- d) Ensuring easy-to-use, secure online booking.
- e) Sharing with SLEP a proportion of the commission received on accommodation.

### ***b.8. Catering and Social Events***



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- a) Arranging catering for delegates at the meeting including coffee breaks and lunch boxes.
- b) Organizing an annual "President's dinner" for invited speakers.
- c) Organizing a welcome reception.
- d) Organizing child care during the annual meeting.
- e) Promoting an environmentally friendly meeting.

### ***b.9. Sponsorship regulations***

- a) Reviewing all activities and sponsored items in the light of pharmaceutical industry regulations in all Latin American countries.
- b) Evaluating the meeting by delegates through feedback forms. Reporting back promptly to SLEP for its internal evaluation.

### ***b.10. Ensuring and actively promoting a prominent profile for SLEP and its annual meeting***

- a) Developing a meeting image and managing design and publication of publicity materials.
- b) Developing a publicity plan to ensure a wide coverage to the appropriate communities in Latin America.
- c) Promoting the meeting actively by all means, monitoring response and taking further action as needed.

### **2.1.3. Tender for PCO – Financial services**

SLEP expects candidate PCOs to address specific aspects of financial services in their application – proposals and policies, as well as traceable records should be provided when appropriate. A list of items, grouped by topics is listed below.

- a) Providing full financial transparency regarding all financial transactions.
- b) Describing the procedures for budget development and collaboration with the SLEP Finance Committee.
- d) Guaranteeing income to SLEP from the annual meeting.
- e) Providing detailed policies and fees for all described services including, if applicable:
  - Overall management, commissions
  - Communication costs
  - Onsite congress management and supervision
  - Registration processing
  - Abstract handling
  - Exhibition management
  - Sponsorship solicitation
  - Any additional fees Council travel to Annual Meeting
  - Participation in Finance Committee and Council meetings
  - Traveling and meeting site visits
- f) Describing the candidate PCO professional insurance coverage or any similar legal/financial protection system used



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## **2.1.4. General Information and Experience**

The company submitting the information should answer briefly and specifically the following questions and/or requests:

- a) Describe your Company's structure and organizational composition, as well as staff experience.
- b) Provide details as to membership of conference organisation bodies.
- c) Describe your company's experience in organising medical/scientific international congresses of similar scope and size to SLEP in Latin America; please provide the list of International associations where you serve as PCO. Reference checks will be handled in strict confidence.
- d) Describe your company's system of working around Latin America in different countries.
- e) Describe your experience in increasing congress attendance. How was this goal achieved?
- f) Describe your experience in increasing congress sponsorship. How was this goal achieved?
- g) Describe your modus operandi and proven experience in emergency management, e.g. in times of strikes, world events or natural disasters?
- h) Describe the new technologies you have used (apps etc.) in program organization and the general evolution of their use at the meeting you organize.

## **2.2. DURATION OF THE CONTRACT:**

36 months from the award of the contract, with possibility to extend for 36 further months.

## **3. LEGAL, ECONOMIC, FINANCIAL AND TECHNICAL INFORMATION**

### **3.1. CONDITIONS RELATING TO THE CONTRACT**

State legal form of the contract proposed (e.g. supply a model).

### **3.2. CONDITIONS FOR PARTICIPATION**

#### **3.2.1. Information concerning the situation of the service provider and information and formalities necessary for the evaluation of the minimum economic, financial and technical capacity required:**

##### **a. Companies submitting tenders will need to demonstrate previous experience in the following areas:**

- membership processing for biomedical societies,
- secretariat services to biomedical societies,
- management of web sites and publication of newsletters,
- development of commercial input into biomedical societies,
- provision of advice on legal, governance good-practice and financial issues.

Experience in these areas will need to be stated together with a client list under each heading. Materials, web site addresses etc. must be supplied with evidence that these services were provided by the tendering company and not by a sub-contracted company.





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## **b. Legal position – means of proof required:**

(1) An extract from the 'judicial record' or equivalent issued by the legal or administrative authority of the country of origin, by a declaration on oath or by a solemn declaration made before a competent judicial or administrative authority, a notary or a competent professional or trade body, demonstrating that the bidder:

- is not bankrupt or being wound up, its affairs are not being administered by the court, it has not entered into an arrangement with creditors, it has not suspended business activities or is not in any analogous situation arising from a similar procedure under national laws and regulations;
- is not the subject of proceedings for a declaration of bankruptcy, or for an order for compulsory winding up or administration by the court or for an arrangement with creditors or of any other similar proceedings under national laws and regulations;
- has not been convicted of an offence concerning his professional conduct by a judgment which has the force of res judicata (i.e. a matter which has already been conclusively decided by a court).

(2) A certificate issued by the competent authority in the Member State concerned, or a declaration on oath or by a solemn declaration made before a competent authority, a notary or a competent professional or trade body, to the effect that the bidder has fulfilled its obligations relating to the payment of taxes and social security contributions in accordance with the legal provisions of the country in which the bidder is established.

(3) A certificate, declaration under oath, or solemn declaration providing proof that the bidder is enrolled on the professional or trade registers of his country of establishment, or where no such register exists a declaration under oath or solemn declaration that he exercises the particular profession or trade.

## **c. Economic and financial capacity – means of proof required:**

(1) Presentation of the bidder's balance sheets or extracts from the balance sheets, where publication of the balance sheet is required under the law of the country in which the bidder is established.

(2) A statement of the bidder's overall turnover and the turnover related to similar activities covered by this contract, for the three previous financial years.

## **d. Technical capacity – means of proof required:**

(1) A statement of the educational and professional qualifications of the bidder's managerial staff and of those persons who will be responsible for carrying out the contract requirements.

(2) A list of the principal deliveries of supplies or services effected by the bidder in the past three years, with the sums, dates and recipients, public or private, involved.

(3) A statement of the bidder's average annual manpower and the number of managerial staff for the past three years.

## **3.3. CONDITIONS SPECIFIC TO SERVICES CONTRACTS**

### **3.3.1. Provision of the service is reserved to a specific profession: No.**



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**3.3.2. Legal entities required to state the names and professional qualifications of the personnel responsible for execution of the contract:** Yes.

## **4. PROCEDURE**

**4.1. TYPE OF PROCEDURE:** Open.

**4.1.1. Candidates already selected:** No.

**4.1.2. Envisaged number of suppliers which will be invited to tender:** 5 to 10.

### **4.2. AWARD CRITERIA:**

The most economically advantageous tender in terms of criteria as stated in the object of the contract.

### **4.3. ADMINISTRATIVE INFORMATION**

**4.3.1. Reference attributed by SLEP:** CPCO-2018

**4.3.2. Conditions for obtaining contract document and additional documents:** As in 1.1

**4.3.3. Time-limit for receipt of tender (applications should be sent electronically to [secretary.general@slep.com.br](mailto:secretary.general@slep.com.br) and [treasurer@slep.com.br](mailto:treasurer@slep.com.br)):** August 31, 2018. Time: 12:00 in Buenos Aires.

**4.3.4. Language or languages in which tenders or requests to participate can be drawn up:** English or Spanish or Portuguese.

**4.3.5. Minimum time frame during which the tenderer must maintain its tender:** 4 months from the deadline stated for receipt of tenders.

**4.3.6. Conditions for opening tenders:** 3 people appointed by SLEP Council will open all tenders.

**4.3.7 Date, time and place for opening tenders:** September 3, 2018 at 11:00 in Buenos Aires.

**4.3.8. Date for communication of tender result:** December 3, 2018.

**4.3.9. Date to assume responsibilities for the above services:** January 2, 2019.