

Appendix I: Roles and Responsibilities

To fully understand the management structure the E-AHPBA Congress, a schedule of roles and responsibilities has been created and are detailed below. The roles and responsibilities clearly map the ownership for each process, identifying the parties responsible and the level of involvement.

The parties included are:

- LOC – Local Organising Committee
- SPC – Scientific Programme Committee
- E-AHPBA– The Association
- EA-AM – E-AHPBA Management Office
- EA-PM – E-AHPBA Project Manager and Congress Team

Schedule of Responsibilities for a face-to-face Congress:

Please note that **X** denotes primary responsibility for an action, while **x** is a secondary partner in a shared role. All the services below should be included in the respective contracts.

LOC	SPC	E-AHPBA	EA-AM	EA-PM	1 CONGRESS INFRASTRUCTURE
X				x	Organise the congress in accordance with the bid manual and congress guidelines document and appendices
		X		x	Arrange legal set-up of event
x		X		x	Register event for VAT
x		X		x	Agree financial set up and requirements
x		X		x	Open bank accounts (local country and UK)
X		X			Appoint and contract destination management company or professional conference organiser to assist in the local logistics (local DMC)
X					Confirm Local Organising Committee (LOC) members
X					Agree roles of LOC members
X					Identify other available resources and confirm
x		x		X	Preparation of event budget and cash flow
x		x		X	Agree communication and reporting plan
x				X	Draft time schedule to include all aspects of organisation of the Congress – to be submitted to the E-AHPBA for approval
x				X	Produce event timeline
				X	Provide administrative support to LOC

LOC	SPC	EAHPBA	EA-AM	EA-PM	2 FINANCIAL MANAGEMENT
		X		x	Provide budget template
x				X	Draft budget
x		x		X	Discuss budget with E-AHPBA – E-AHPBA Executive to approve
X			x	X	Consider financial set-up and local tax
			x	X	Set up UK Euro bank account
x				X	Set up Local currency bank account (f required)
x				X	Conduct contract negotiations with suppliers
		X		x	Approve contracts with main suppliers
		x	x	X	Agree working process for all financial transactions
X				x	Arrange for E-AHPBA Treasurer and Executive Director to have online access to local bank account information (if required) and not for transactions

LOC	SPC	EAHPBA	EA-AM	EA-PM	2 FINANCIAL MANAGEMENT Continued
		x		X	Set up request for payment procedure
		x		X	Maintain request for payment procedure
		X		x	Authorise payment transactions over a specified limit from both accounts
		x	x	X	Prepare schedule of meetings with LOC Treasurer and E-AHPBA Treasurer
x		x		X	Meetings with LOC Treasurer and E-AHPBA Treasurer as required
				X	Revision, control and updating of budgets
				X	Cash flow management
X			x	X	Collection of industry income and government support
				X	Liaison with LOC regarding seed funding
x		x		X	VAT management (VAT)
x				X	Preparation of financial statements at agreed regular intervals
x				X	Management of bank accounts (LOC + E-AHPBA)
x		X		x	Funding of bank account to meet all required expenditure
		x		X	Bookkeeping and accounting
				X	Processing credit/debit card payments for registration fees
x		x		X	Event insurance
x				X	Draft accounts and final accounts
			x	X	Arrange external audit of Biennial Congress accounts

LOC	SPC	EAHPBA	EA-AM	EA-PM	3 SPONSORSHIP & EXHIBITION SALES
x		x		X	Preparation of potential exhibitor & sponsorship database
x		x		X	Preparation of sales strategy and timeline

LOC	SPC	EAHPBA	EA-AM	EA-PM	4 MARKETING STRATEGY
X	x			x	Identification of event theme and objectives
X				x	Identification of unique selling points
x				X	Create and establish brand profile
x		x		X	Identification of available resources (database, journals, website, social media platforms)
x				X	Identification of related organisations
x				X	Identification related events
x				X	Identification of target market
x				X	Identification of marketing media to be used
x				X	Identification of principal marketing stages and timeline (marketing plan)

LOC	SPC	EAHPBA	EA-AM	EA-PM	5 VENUE MANAGEMENT
x				X	Negotiation, agreement of contracts
x		X		x	Signing of contracts
				X	Preparation and administration of tenders for goods and services
x				X	Allocation of facilities to sessions, exhibition,
				X	Preparation of venue schedules
				X	Build-up and break-down of all sets and
				X	Organisation of essential security
				X	Administration of health and safety regulations

LOC	SPC	EAHPBA	EA-AM	EA-PM	6 SCIENTIFIC PROGRAMME - General
x	x	x		X	Produce a timeline and critical dates schedule
x				X	Circulate template and collaborate on venue overview
	X	x		X	Attend scientific programme/congress committee meetings/teleconference calls as appropriate *
	X	x		x	Attend programme topic meetings while the programme structure and content are being decided
	X	x		x	Attendance at programme allocation meeting
				X	Administer abstract submission software *
				X	Provide programme information for CME Application
x				X	Prepare and submit application for CME
				X	Prepare all information for the website / online planner
				X	Distribute online confirmation to every presenter attending
	x			X	Liaison with companies for industry sponsored symposia

LOC	SPC	EAHPBA	EA-AM	EA-PM	7 SCIENTIFIC PROGRAMME - Invited Speakers and Chairs
	X			x	Prepare schedule of invited speakers

	X			x	Allocate sessions to programme grid
				X	Arrange for circulation of invitations and confirmations
				X	Handle all correspondence
				X	Liaise with invited speakers
				X	Collect abstracts for invited speakers (if
				X	Distribute online confirmation to all keynote and invited speakers
				X	Collection of conflict-of-interest forms from invited speakers
				X	Produce and circulate presenter notes
				X	Manage invited speaker honoraria
				X	Manage invited speaker expense
				X	On-site invited speaker management

LOC	SPC	EAHPBA	EA-AM	EA-PM	7 SCIENTIFIC PROGRAMME - Invited Speakers and Chairs Continued
				X	Invitations, confirmation, and liaison with session chairmen
				X	Arrange preparation of indices by author/topic for book of abstracts (invited speakers only)
				X	Arrange speaker presentation room onsite

LOC	SPC	EAHPBA	EA-AM	EA-PM	8 SCIENTIFIC PROGRAMME – Abstracts
				X	Prepare abstract timetable (in liaison with publishers)
	x			X	Prepare call for abstract text for website or printed materials
				X	Liaison with abstract submission software
				X	Arrange preparation of call for papers online submission form
				X	Receive online abstract forms
				X	Monitor abstract submission
				X	Clean abstract titles, authors, format text for consistency
				X	Arrange preparation and circulation of acknowledgements
				X	Produce monthly abstract statistics for scientific programme committee
				X	Liaise with abstract submission software company to set up online reviewing form
				X	Arrange preparation for online review by topics/reviewer
				X	Co-ordinate review of abstracts
				X	Input review results and prepare reports
				X	Organisation of scientific programme allocation meeting
				X	Prepare session allocation charts/summary outline programme sheets for review meeting
	X			X	Attend scientific review meeting
				X	Computer inputting at scientific review meeting and production of programme details

				X	Compilation of programme
				X	Arrange preparation and circulation of acceptance/rejection letters
				X	Cross-check abstract submitters 'v' registered delegates - chase non-registered
				X	Remove abstracts of unregistered presenters from book of abstracts
				X	Send accepted abstracts to HPB publisher
				X	Produce presenter notes
				X	Circulate presenter notes

LOC	SPC	EAHPBA	EA-AM	EA-PM	8 SCIENTIFIC PROGRAMME – Abstracts Continued
				X	Produce general information for book of abstracts and final programme
				X	Prepare scientific programme element of final programme
x	x			X	Proof final programme (scientific programme elements)
				X	Arrange preparation of indices by author/topic for book of abstracts (abstract presenters only)
	x			X	Prepare digital book of abstracts (within the HPB) for production
				X	Proof book of abstracts
				X	Abstract presenter registration
				X	Liaise with accepted abstract presenters
				X	On-site abstract presenter management

LOC	SPC	EAHPBA	EA-AM	EA-PM	9 SCIENTIFIC PROGRAMME – Posters/e-posters
				X	Arrange preparation of posterboard layouts/e-poster terminals
				X	arrange health and safety approval of poster layouts
				X	obtain quotations from poster board / e-poster supplier
				X	Arrange poster presentation hardware
				X	Arrange for installation and break-down of poster stations
				X	Allocation of poster themes to poster sites
				X	Scheduling of poster header panels
				X	Arrange for installation and change-over of header panels
				X	Arrange for and supervise poster check-in desk
				X	Arrange preparation and circulation of poster presenter
				X	Arrange preparation of poster confirmations
	X			x	Judging and awarding of prizes for best poster

LOC	SPC	EAHPBA	EA-AM	EA-PM	10 AUDIO-VISUAL
				X	Specification of audio-visual facilities
				X	Obtain quotations for audio-visual including technical support

				X	Arrange preparation and circulation of audio-visual guidelines
				X	Scheduling of audio-visual requirements
				X	Arrange for installation of required audio-visual equipment
				X	Liaison with technicians
				X	Management of speaker room

LOC	SPC	EAHPBA	EA-AM	EA-PM	11 EXHIBITION MANAGEMENT
x		x		X	Fulfilment of exhibition and sponsorship sales strategy
				X	Preparation of exhibition administration
				X	Arrange preparation and approval of floor plans
				X	Arrange preparation and distribution of exhibition prospectus
				X	Stand allocation and confirmation
				X	Exhibitor invoicing and management of staged payments
				X	Appointment and liaison with contractors for shell scheme and other services
				X	Venue and sub-contractor management
				X	Arrange preparation, production, and circulation of a technical exhibition manual
				X	Arrange preparation of exhibition catalogue or provision of copy for inclusion in the programme
				X	Arrange preparation of exhibitor badges
				X	Arrange preparation and circulation of exhibitor joining instructions
				X	Liaison with police and local authorities as
				X	Appointment and scheduling of security and installation
				X	On-site management

LOC	SPC	EAHPBA	EA-AM	EA-PM	12 SPONSORSHIP MANAGEMENT
x		x		X	Fulfilment of exhibition and sponsorship sales strategy
				X	Arrange the preparation, production, and circulation of sponsorship information
		x	X	x	Liaison with E-AHPBA Corporate Partner companies
x		x		X	Raising, negotiation and agreement of sponsorship
				X	Invoicing of sponsors
				X	Management of sponsor group registration and housing
				X	Preparation and production of industry participation manual

x		x		X	Sponsor liaison regarding requirements which relate to or involve the event
				X	Sale of hospitality suites and sponsor enhancements
x		x		X	Agreement of advertising opportunities for sponsors and sale of agreed advertising space
				X	On-site management of sponsors

LOC	SPC	EAHPBA	EA-AM	EA-PM	13 CONSTRUCTION
				X	Arrange preparation of layout plans for all construction items
				X	Arrange for health and safety approval
		x		X	Appoint contractors
				X	Preparation of signposting schedule (internal & external)
				X	Arrange production of all signposting
				X	Supervise build-up and break-down

LOC	SPC	EAHPBA	EA-AM	EA-PM	14 REGISTRATION
				X	Provide registration information for Congress website
				X	Design of online registration forms
				X	Provide group registration booking system
				X	Process registrations (online booking form only)
				X	Circulate acknowledgements, invoices, and VAT receipts
				X	Provide client reports at agreed intervals
				X	Check that abstract presenters have registered
				X	Monitor delegate payments
				X	Maintain delegate database
				X	Circulate letters of invitation to delegates as required
				X	Circulate welcome letters/joining instructions
				X	Answer delegate queries as required
				X	Arrange preparation of badge card, badges, and tickets
				X	Arrange supply of badge card, badges, lanyard/clips, delegate hand-out materials
				X	Arrange production of participant lists (if
	x			X	Prepare and circulate questionnaires for CME accreditation (if required)
				X	Arrange preparation of certificate of attendance
				X	Offer group registration pre-pickup on site
				X	Supervise staffing* for group registration area
				X	Arrange the preparation and packing of delegate briefcases
				X	Preparation of layout plans for registration area and onsite offices
				X	Arrange health and safety approval of registration area

				X	Obtain quotations from stand builders
				X	Appoint contractors

LOC	SPC	EAHPBA	EA-AM	EA-PM	14 REGISTRATION Continued
				X	Provide communication, furniture, header panel schedule
				X	Supervise registration area build-up and break-down
				X	Planning and oversight of on-site registration
				X	Arrange staffing and control of on-site registration area including a new registration service – additional staff required
				X	Prepare staff briefs for circulation to temporary
				X	Arrange briefing of on-site staff and control of on-site registration area including a new registration service
				X	Facilitate all registration related finances onsite (EURO)

LOC	SPC	EAHPBA	EA-AM	EA-PM	15 PRINT & PROMOTION
x				X	Arrange preparation and production of design theme in line with marketing strategy
				X	Set up and maintain website
x				X	Arrange preparation and drafting of the non-scientific content of all print (hardcopy or
	x			X	Arrange preparation and drafting of the scientific content of all print
x		x		X	Arrange proofing and production of non-scientific print
				X	Arrange inclusion of design theme on all event materials
				X	Maintenance of delegate database
			x	X	Arrange production of promotional material
			x	X	Arrange co-ordination and production of
x		x		X	Arrange for attendance at related events as appropriate
x		x	x	X	Co-ordination and management of advertising at other related events as appropriate
				X	Arrange preparation of information for online media including website and major social
x		x		X	Fulfilment of the marketing strategy and plan

LOC	SPC	EAHPBA	EA-AM	EA-PM	16 CATERING
				X	Arrange delegate catering: coffee/tea/water fountains
				X	Arrange delegate lunches as appropriate
				X	Arrange hospitality catering e.g. that required by sponsors, exhibitors, committee members etc
				X	Arrange staff catering

LOC	SPC	EAHPBA	EA-AM	EA-PM	17 SOCIAL PROGRAMME
X				x	Put forward a suggested social programme
X		X		x	Agree social programme
				X	Venue management
				X	Arrange all catering
				X	Arrange production of all print, including menus, tickets, seating plans, place cards and
				X	Invite VIPs, patrons etc
				X	Handle protocol and guest lists
				X	Administration of arrangements relating to VIPs
				X	Co-ordination of all entertainment, staging, theming, and décor
				X	Organisation of build-up and break-down arrangements as appropriate
				X	Arrange all transport as appropriate
				X	Oversee each event

LOC	SPC	EAHPBA	EA-AM	EA-PM	18 LOCAL TRANSPORTATION
				X	Negotiation and agreement of contracts with transport operators
				X	Preparation of transport schedules
				X	Arrange recruitment and briefing of traffic
				X	Arrange coach stops as necessary including obtaining permission from police and local authorities where necessary
				X	Arrange signposting of coaches and coach
				X	Arrange preparation of tickets for use on

LOC	SPC	EAHPBA	EA-AM	EA-PM	19 STAFFING
x				X	Recruitment of staff and students
				X	Undertaking of full staff briefings, both written and verbal
				X	Provision of health and safety briefings on-site
				X	Organisation of uniforms/T-shirts for staff and students
				X	Arrange staff catering and organisation of rest areas on site
				X	Arrange staff accommodation (ACS team)
				X	Arrange payment of all staff including provision

LOC	SPC	EAHPBA	EA-AM	EA-PM	20 DELEGATE HOUSING MANAGEMENT
				X	Site inspection and selection of hotels
				X	Arrange takeover of accommodation already booked
				X	Block booking of accommodation
				X	Negotiation and agreement of room rates
				X	Arrange preparation of copy for print work, to incorporate all necessary information on an accommodation booking form

				X	Room allocation and confirmation for individuals, groups, speakers, guests etc.
				X	Amendments to bookings as required
				X	Forwarding prepayments/deposits and rooming lists to the hotels
				X	On-site accommodation service
				X	Liaison with hotels

<i>LOC</i>	<i>SPC</i>	<i>EAHPBA</i>	<i>EA-AM</i>	<i>EA-PM</i>	<i>21 FLIGHTS</i>
				X	Set-up of flight booking engine
				X	Inclusion of flight booking engine in all correspondence and promotion
				X	Management of flight bookings

* denotes provision should be allowed for item in Congress budget

denotes primary responsibility for an activity

is a secondary involvement

