



# *International Primatological Society*

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RESEARCH   CAPTIVE CARE   EDUCATION   CONSERVATION

## **GUIDELINES FOR SUBMITTING A BID TO HOST A CONGRESS OF THE INTERNATIONAL PRIMATOLOGICAL SOCIETY**

The International Primatological Society (IPS) requires that you use the following guidelines for preparing a bid to host an IPS Congress. Remember, you are preparing a bid to host the Congress of the International Primatological Society; as such, all aspects of the Congress will be under the auspices of the IPS Council and their designees. These guidelines outline the minimal components that are required in an appropriate bid to host a Congress; the inclusion of additional information that will allow the IPS Council to make a more informed decision is strongly encouraged. This is a long and detailed document that was designed to facilitate the preparation of complete and successful bids. It is advantageous to all IPS members for all bid proposals to make use of our previous experience and to address as many important issues as early in the Congress-development process as is possible.

Bids must be submitted to the IPS Secretary General at least one month prior to the IPS Council meeting that occurs at the Congress four years prior to the bid year (e.g., August, 2010 for the 2014 Congress). Submitted bids will be discussed and the successful bid selected at the Council meeting that occurs immediately before the opening of the Congress. Representatives of the group that prepared the bid are expected to make a presentation in support of their bid at the Council meeting. The presentation package should include both audiovisual materials and handouts containing any information that was not included in the official bid document. The representative of the group that submitted the successful bid will be expected to make a brief presentation describing plans for the Congress to the IPS membership in the General Assembly on the last day of the Congresses at which the bid was accepted and that immediately precedes the Congress to be hosted.

Questions concerning the bid process and any information contained in this document should be directed to the:

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IPS Treasurer, Trudy Turner, PhD ([trudy@uwm.edu](mailto:trudy@uwm.edu))

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**I. Provide general information concerning the location and attractions of the Congress City and/or Country**

- A. Provide information about the general site of the meeting (e.g., capital city; regional city; self-contained conference facility, local history, etc.).
- B. Provide detailed information about access to the location of the Congress, including:
  - Name of the most convenient international airport
  - Names of airlines and numbers of flights that serve that airport
  - Distance, travel times, and available modes of transportation from the airport to the Congress venue
  - Alternative airports, train stations, bus stations, etc. that can be used to get to the Congress venue
  - Necessities and procedures for obtaining visas
  - Current health and/or safety risks associated with the host city/country
- C. Provide basic information concerning tourism opportunities for conference attendees and/or their guests

**II. Identify the Local Organizing Committee Chairperson**

- A. The Local Organizing Committee Chairperson is typically a long-time member in good standing of IPS who has previously attended multiple IPS Congresses. The organization of an international Congress that is likely to attract between 800 and 1600 participants is a time-consuming process that begins more than four years prior to the Congress and does not end until at least six months after the Congress. The Local Organizing Committee Chairperson must have the time available to commit to this demanding process.
- B. The Local Organizing Committee Chairperson will interact directly with at least two members of the IPS Council during all phases of Congress planning and implementation; the Treasurer, typically concerning financial matters, and the Secretary General. Other members of the IPS Council will also be involved in the planning and implementation of specific aspects of the Congress, including the Pre-Congress Training Program, the Scientific Program, and the Student Competition. Additional details concerning interactions with members of the IPS Council will be presented later in this document.
- C. The naming of two Co-Chairpersons is acceptable and may be preferable.
- D. If a Professional Conference Organizer (PCO) will be utilized, all relevant details concerning contracts with, payments to, and services provided by the PCO must be specified. The Local Organizing Committee Chairperson and at least one member of the IPS Council will represent IPS in dealings with the PCO. The names and contact information for at least two representatives of the PCO must be provided.

### III. Provide information concerning the Local Organizing Committee

- A. In addition to identifying the Local Organizing Committee Chairperson, the bid must identify other members of the Local Organizing Committee, discuss the division of responsibilities within the Local Organizing Committee, and identify the chairpersons of any subcommittees.
- B. IPS Council members must be integrated into all components of the Local Organizing Committee to take advantage of their expertise and to ensure that the Congress adheres to the goals and missions of IPS. At a minimum, the following IPS officers would be involved with the following functions:
- The IPS Secretary General and VP for Communications would be involved in the overall organization of the Congress.
  - The IPS Treasurer would be involved in all aspects of the financial management of the Congress.
  - All members of the IPS Council would be involved in the organization of the scientific program, including the selection of plenary speakers.
  - The IPS VPs for Education and/or Research would be involved in the student competition.
  - The IPS VPs for Conservation, Education, Research, and/or Captive Care would be involved in the official IPS Pre-Congress Training Program.

### IV. Identify the proposed dates for the Congress

- A. Normally, dates in June, July, or August are preferred, as these times coincide with the longest break in the academic teaching calendar in most countries in the northern hemisphere. Other dates are possible. IPS has met twice (1979, 2001) in early January in the southern hemisphere (also in Ecuador 2022) and we met in September, 2010 in Japan. January conferences have been smaller than July/August conferences.
- B. The dates for the Congress should facilitate easy and inexpensive travel to the Congress venue (as well as can be predicted four years in advance). Scheduling Congresses in temporal proximity to major national or international events (World Cup, Olympics, elections, etc.) should be avoided.
- C. The typical IPS Congress lasts six to seven days as described below:
- Day One: Registration, Council meeting, Opening Reception
  - Day Two: Scientific Sessions, Exhibits, and Silent Auction
  - Day Three: Scientific Sessions, Exhibits, and Silent Auction
  - Day Four: Scientific Sessions, Exhibits, and Silent Auction
  - Day Five: Scientific Sessions, Exhibits, and Silent Auction
  - Day Six: Scientific Sessions, Exhibits, Silent Auction, General Assembly, and Closing Banquet
  - Day Seven: Council meeting (for Council members and their invitees only)
- D. Social components of the program (field trips, receptions, tours, etc.) can, and should, be included on Days two through five.

**V. Provide a description of the venue and the physical facilities****A. Provide the following:**

1. Name, address, and website of the venue(s) and detailed information concerning the facilities available for:
  - Scientific sessions (IPS typically requires space for 6-7 concurrent sessions)
    - Plenaries (the room used for plenary addresses and the General Assembly should be large enough to accommodate ALL Congress registrants, >800)
    - Symposia
    - Smaller sessions
    - Poster sessions
  - Exhibits
  - Silent auction
  - Receptions
  - Meeting rooms for committees, the Council of IPS, and other groups
  - Space and equipment to check presentations
  - Audio Visual and technical support
2. Services available at the Congress venue(s):
  - Registration and Setup, including on-site registration
  - Internet access
  - Business center
  - Security
  - Transportation
  - Guides/Docents/Ushers
  - Drinking water
  - Storage of materials
  - Tourist activities
  - Accommodations booking
3. Catering Services
  - Opening reception
  - Morning breaks
  - Lunches (optional or included)
  - Afternoon breaks
  - Evening receptions
  - Closing banquet

**VI. Provide basic information concerning the scientific program, and the abstract submission and review process**

- A. The Local Organizing Committee Chairperson must present a concise statement/phrase/theme that will serve as the scientific focus of the Congress. This statement or theme should emphasize the primatological strengths of the host country/institution.
- B. The Scientific Committee should be of appropriate size, experience, and diversity to provide all attendees with a scientific program that is intellectually stimulating and enriching. While it is not necessary to name the members of this committee four years in advance, it will be valuable to be able to provide the name of the Chairperson of the Scientific Committee and to briefly describe the selection criteria that will be used to ensure diversity in the geographic and academic representation of committee members. In an effort to present the most up-to-date findings at an IPS Congress, the abstract submission deadline must be no sooner than 9 months prior to the Congress. It is important to note that a large number of abstracts are likely to be submitted and the Scientific Committee must be large enough to thoroughly review these abstracts in a very timely fashion (less than 3 months will be available to review abstracts and construct the scientific program).
- C. The Local Organizing Committee Chairperson must present a basic description of the system(s) that will be employed to facilitate abstract submission and participant registration. At recent IPS Congresses, these functions have been internet-based and linked together. Descriptive information and/or customer reviews must be provided if a commercial 'system' (through the Professional Conference Organizer or another entity) will be utilized. The 2006 IPS Congress in Uganda successfully utilized the Conference Management Technology of the American Society of Primatologists and the 2012 Congress in Mexico was planned to as well. **It is unlikely that a bid that proposed to utilize a non-internet-based abstract submission/registration system would be accepted.**

**VII. Present ideas for the official IPS Pre-Congress Training Program, with a captive care, conservation, research, and/or education theme**

- A. The Society is committed to conducting a Pre-Congress Training Program (between 3 and 5 days long) at each Congress. The Pre-Congress Training Program (PCTP) should enroll 12-30 young primatologists, primarily from under-resourced habitat countries. The Local Organizing Committee's role in this effort can range from complete\* organization of the PCTP (as occurred in Indonesia, the USA, and Madagascar, in 1994, 1996, and 1998, respectively) to aiding with limited aspects of the organization and logistics of the Training Program (as occurred in China in 2002, Italy in 2004, Uganda in 2006, and Scotland in 2008). The bidding group is responsible for organizing the Pre-Congress Training Program, but is not responsible for funding or guaranteeing the expenses associated with conducting the Pre-Congress Training Program. Ideas from the bidding group concerning the special opportunities that exist for a small group of exceptional and highly-motivated primatologists in the country of the Congress are encouraged. The expenses associated with participation in the PCTP are paid for all participants, including travel, registration, accommodations, and per diem, during both the PCTP and the actual Congress. Participants are chosen from the pool of applicants and logistical arrangements must be made well in advance of the PCTP.

\* At least one person on the Local Organizing Committee was, and will be, intimately involved in the organization of the Pre-Congress Training Program, in close collaboration with the relevant IPS Vice President(s) mentioned above.

### VIII. Provide comprehensive budget information

A. Construct a budget for the Congress, based on a specified total number of attendees (paying and non-paying) that includes estimates of all revenues and all expenses for the Congress. This specified number of attendees should represent both 1) a realistic estimate of the number of attendees and 2) the approximate number of attendees that will generate a balanced budget. **Bids that include budgets in which total expenses exceed total revenues will not be considered.**

B. Estimated revenues should include:

- Registration fees for paying participants and guests
- Exhibitor fees
- Donations
- Sponsorships
- Credit card payment supplements
- Optional item sales
  - Banquet tickets
  - T-shirts
  - CDs
  - Extra tote bags
  - Shuttle service
  - Tours
  - Other food and beverage (lunches (if optional), dinner at the zoo, etc.)

C. Estimated expenses should include:

- Venue rental fees
  - Facilities (rooms, exhibit halls, etc.)
  - Audio Visual equipment and services
  - Administrative support
  - Support services (security, ushers, etc.)
- Congress catering costs
  - Drinking water
  - Opening reception
  - Morning breaks
  - Lunches (optional or included)
  - Afternoon breaks
  - Evening receptions
  - Banquet
  - Other social functions
- Congress organizer costs (Professional Congress Organizer or Volunteer Organizer)
  - Office staff
  - Office supplies (Nametags, CDs, etc.)
  - Communication (equipment and services)
  - Website establishment and maintenance (including registration and abstract submission)
  - Advertisement

- Support for Local Organizers during the Congress (travel, accommodations, meals)
- Tote bags and other commemorative items
- T-shirts
- Administrative fees
  - Banking fees
  - Credit card fees
- Transportation costs
  - Airport shuttles
  - Hotel to Congress shuttles
- Subsidies for volunteers
- Plenary speakers’ travel and honoraria
- Abstract publishing
- Contingencies
  - 10% of estimated expenses

D. Registration fees for participants and guests should be calculated according to the following matrices:

- Divide the total sum of all expenses by the targeted number of paying attendees. This will give you a number (X) that you will set as the Early Bird fee for Full Members (the **Base Registration Fee**). The rest of the registration fees will be determined according to the formulas in the table below:

**Registration Fee Matrix**

	Registration Time	Early Bird	On-Time	Late	On-site
Participant type					
Full member		<b>X = Base Registration Fee</b>	1.1X	1.25X	1.4X
Student/Range country member		0.6X	0.66X	0.75X	0.85X
Non-member		1.25X	1.4X	1.55X	1.7X
Guest		0.4X	0.45X	0.5X	0.6X

- This table on the next page contains the approximate proportions of **total** participants that are likely to register in each of the categories, at each of the time points. Use this table to make certain that your proposed **Base Registration Fee** will allow you to cover all expenses. You must identify and justify all adjustments that you make to any of the parameters in either table (You are advised to discuss any adjustments with the IPS Treasurer during the early phases of the bid development process).

**Registration Proportion Matrix**

	Registration Time	Early Bird	On-Time	Late	On-site
Participant type					
Full member		28%	16%	1%	1%
Student/Range country member		25%	13%	1%	1%
Non-member		2%	5%	1%	1%
Guest		2%	1%	1%	1%

**IX. Provide a timeline for when income and expenses are going to occur**

- A. The Local Organizing Committee Chairperson must prepare a timeline that shows when income is going to be generated and when expenses will have to be paid. For example, if the Early Bird registration deadline is 12 months prior to the Congress, an estimate of income at that time point must be provided. Additionally, if venue and catering deposits are due at the time of contract signing and/or nine months prior to the event, then the due dates for these payments must also be specified.
- B. The Early Bird registration deadline can precede the abstract submission deadline. In the past, these two events have coincided with one another, but they are not required to do so.
- C. This timeline should include the dates upon which financial reports will be submitted to the IPS Treasurer. Preliminary financial reports must be submitted 24, 18, 12, 6, and 3 months prior to the Congress. Financial activity reports must be submitted 3, 6, and 9 months after the Congress. A final financial report must be submitted no later than 12 months after the Congress.

**X. Provide evidence of financial and legal sponsorship**

- A. Financial and legal sponsorship or backing from a legal entity (e.g., municipal government, university, agency of national government, legally registered organization) with adequate financial assets to act as a financial guarantor for the Local Organizing Committee’s activities is required. A signed, original letter on official letterhead from these entities, indicating their sponsorship, must be provided.

**XI. Provide a plan that includes innovative techniques to encourage participation by IPS members with limited financial means**

- A. The Local Organizing Committee Chairperson must present several innovative ideas that are focused on increasing participation at the Congress by IPS members that have limited financial resources. This may include applying for grants, identifying individual supporters, or other creative ways to fund such participants.

**XII. Provide information concerning options for accommodations**

- A. The Local Organizing Committee Chairperson must provide information concerning the range of accommodations available for Congress participants and the mechanisms that will be used to facilitate Congress attendees finding and renting appropriate accommodations. Where possible, special ‘Congress rates’ should be negotiated, especially if a ‘Congress Headquarters Hotel’ is to be utilized. These rates should be valid for the period from at least two days prior to the Congress until two days after the Congress.



- B. Accommodation options should include a full range of inexpensive, moderately-priced, and expensive choices (from camping sites to youth hostels to guest houses to five-star hotels). Since approximately 40% of Congress attendees are students and range country members, at least 40% of the available housing should fall into the inexpensive price category.
- C. There are a number of mechanisms that can be used to match Congress attendees with their desired accommodations. Professional Conference Organizers typically include arrangements for accommodations in their portfolio of services. Housing services or tourism services currently operating in the Congress city are often convenient, efficient, and relatively inexpensive ways for the Local Organizing Committee Chairperson to handle accommodations. In special circumstances, the Local Organizing Committee can attempt to handle the booking of accommodations, but note that this is typically an extremely time-consuming process that requires considerable patience and outstanding problem-solving skills.
- D. Describe transportation systems that will be available to get Congress attendees between their accommodations and the Congress venue.

### **XIII. Provide information concerning the cost of food**

- A. A general estimate of the cost of budget dining for the length of the Congress must be included. If continental breakfasts and/or lunches are included in the registration fee, then this should be noted.

### **XIV. Additional information that may be useful as you are developing your bid**

- A. IPS will provide funding to the Local Organizing Committee to assist with the start-up expenses associated with the IPS Congress. The Local Organizing Committee must request these funds from the IPS Treasurer in writing. A formal agreement will be signed that a) acknowledges receipt of the funds from IPS and b) clearly defines the terms of the financial relationship between IPS and the Local Organizing Committee. IPS is willing to undertake some of the financial risks associated with the organization of the Congress; as such, IPS is entitled to the profits that may result from the Congress. In the event of a Congress that is extremely financially successful, sharing of profits between IPS and the Local Organizing Committee is likely.
- B. A pre-printed "evaluation and comments" form must be included with the conference registration materials so that participants can comment on the organization of the Congress. IPS will supply the template for this form. Receptacles for collection of these forms must be available for the duration of the Congress at the Congress venue.
- C. It is important to state explicitly that the IPS Council considers each bid in great detail. Two of the most important criteria used to evaluate bids are the COSTS to the attendees to participate in the Congress and the probability that an efficient, comfortable, safe, and professional meeting can be organized. These two criteria will sometimes be in conflict with one another. It is impossible to say which of these two criteria is the most important. A Congress that is inexpensive for attendees, but also fraught with organizational difficulties, is unlikely to be a 'good deal' for participants. Congresses that involve the services of a Professional Conference Organizer are typically more expensive than Congresses that do not involve the services of such a group, but they also may be better organized. Slightly higher registration fees that translate into significantly better services may be a good value for Congress participants. Carefully evaluate the relative costs and benefits of paying for such services.

Questions concerning the bid process and any information contained in this document should be directed to the:

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