
Scope of Works (SOW) ADB PCO Requirements - Sample

Appendix 14



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Below is an outline of the Scope of Works (SOW) required to be delivered by the PCO appointed to manage the Asian Development Bank Annual meeting.

The SOW includes but is not limited to:

Annual meeting Management

1. In consultation with the Asian Development Bank and the host country, prepare a planning schedule for the annual meeting, with action items and deadlines for all parties involved.
2. Update and present this plan to the Asian Development Bank and the host country monthly or as agreed with all stakeholders.
3. Meet via video or telephone with the Asian Development Bank and the host country fortnightly during the period of 6- 12 months from the annual meeting and then weekly during the period within 6 months of the annual meeting, or as agreed with the Asian Development Bank and the host country. If located in the same city, WIP's may be face-to-face.
4. Provide relevant insurances and certificates.

Venues

1. Investigate potential annual meeting venues based on requirements specified in the Green Book including preferred dates, expected numbers, size of exhibition space, number of stream, budget, catering, accommodation options, etc.
2. Provide advice to the Asian Development Bank and host country on the selection of annual meeting venues, including a cost breakdown in Excel format of the venues for the meeting, delegate accommodation and social events.
3. Negotiate best rates for accommodation, manage block bookings and cater for special requirements.
4. Once venues are selected, contact the venues and act as the primary point of communication with them.

Sponsorship

1. Work with the Asian Development Bank and host country to develop a list of prospective sponsors and exhibitors.
2. Work with the Asian Development Bank and host country to develop and execute a sponsorship strategy for the annual meeting, including sponsorship levels.
3. Provide regular estimates and updates on anticipated sponsorship in Excel format to the Asian Development Bank and host country.



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4. Prepare the sponsorship prospectus in consultation with the Asian Development Bank and host country.
5. Contact prospective sponsors to achieve sponsorship goals of the annual meeting.
6. Contract with sponsors on behalf of the annual meeting.
7. Manage sponsor requirements, in accordance with the sponsorship prospectus and in consultation with the Asian Development Bank and host country, for exhibition space, speaking opportunities, collateral, sponsored events, sponsored services and delegates.
8. Canvas feedback about the annual meeting and exhibition from sponsors, compile results and provide these to the Asian Development Bank and host country.
9. Ensure all meeting communications, including the annual meeting website, contain up-to- date sponsor information with consistent formatting of sponsorship details (for example in alphabetical order grouped by sponsorship level or similar).
10. Collect high resolution sponsor logos for print materials and web-ready versions for upload to the annual meeting website. Provide to the Asian Development Bank and host country as required.
11. Provide sponsor contact details in Excel format to the Asian Development Bank and host country upon request.
12. Collect full contact details for contact persons for any government sponsors, including press contact, and provide to Asian Development Bank and host country. Immediately notify the Asian Development Bank and host country of any prospective government sponsor and provide an electronic copy of any government sponsorship agreement to the Asian Development Bank and host country.
13. Provide any required post annual meeting reports to government sponsors by the date specified, after prior approval of the draft by the Asian Development Bank and host country. Provide an electronic copy of the report to the Asian Development Bank and host country by the report due date as specified in the sponsorship agreement.

Delegate Registration

1. Is managed and executed by The Asian Development Bank and host country

Speakers

1. Once speakers are selected by the annual meeting committee, make contact with speakers, provide registration information, collect additional contact details, collect their biographies and collect the titles and abstracts for their talks. Provide these details to the Asian Development Bank and host country if requested.



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2. For speakers such as keynotes for whom the annual meeting provides travel assistance, provide a travel bursary or organise the speaker's travel arrangements, as agreed with the Asian Development Bank and host country.
3. Collect information on speaker requirements, including audio visual requirements and ensure these are in place for the event
4. Purchase and prepare speaker gifts if required, in consultation with the Asian Development Bank and host country.
5. Coordinate the collection of speaker presentations and ensure these are uploaded to the AV system prior to the speaker's scheduled talk.
6. Manage speaker consent for publishing their presentation slides and a video recording of their presentation.
7. Collect presentation slides and video recordings of sessions (subject to speaker consent). Assist in publishing these on the annual meeting website if required.
8. Ensure rooms are setup correctly for each session, including tools to assist chairs with timing, and any speaker AV requirements
9. Prepare and distribute instructions to session chairs, including the bios of speakers in their session and step-by-step instructions of what they need to do as chairs.
10. Coordinate rostering of session chairs and provide a schedule to the Asian Development Bank and host country if required
11. Collect attendance number in each session and provide in Excel format to the Asian Development Bank and host country.

Technology Coordination

1. In consultation with the Asian Development Bank and host country, negotiate, book and coordinate the supply and delivery of audio-visual requirements and other underlying technology required by the annual meeting. Be willing to work with preferred providers if directed by the Asian Development Bank and host country. Examples of other underlying technology include network installations, wireless network, power boards, video recordings, mobile application and annual meeting streaming.
2. Act as the point of contact between the annual meeting venue and any external providers including audio visual, network and technology providers to ensure these aspects of the annual meeting experience run smoothly.



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Social Events

1. Make arrangements for annual meeting social events, including, but not limited to venue, catering, entertainment and transport of delegates, in consultation with the Asian Development Bank and host country.
2. Advise on the food and beverage menus for the various activities (taking into account any special dietary requirements)
3. Contract with third parties involved in social event arrangements and act as the primary point of contact with them.
4. Ensure sponsors of social events are recognised as outlined in the sponsorship prospectus and as agreed with the Asian Development Bank and host country.
5. Ensure that annual meeting social events run smoothly including that food and beverage service is on time and as requested

Communications and Marketing

1. Work with the Asian Development Bank and host country to develop and execute a marketing / communications strategy and execution plan for the annual meeting.
2. Create a channel and media marketing plan for the event if public awareness/branding is required in terms of consumer-facing collateral.
3. Develop a wayfinding strategy and execution plan if the meeting is held across multiple locations.
4. Assist in adding content to and managing content on the annual meeting website, including program and sponsor detail.
5. All graphic design and mock ups of branding is the responsibility of the PCO.
6. Negotiate prices and arrange for design, printing and distribution of the annual meeting electronic and printed material such as announcements, brochures, sponsorship prospectus, delegate handbook and promotional materials. Work with a preferred supplier if directed by the Asian Development Bank and host country.
7. Send electronic and printed communications to delegates and prospectus. delegates, sponsors and prospective sponsors, and other parties as agreed with the Asian Development Bank and host country.
8. Provide a draft of all electronic or printed materials for the Asian Development Bank and host country 's approval prior to publishing.
9. Ensure the personal information of all individuals who interact with the annual meeting is protected in accordance with applicable privacy laws.

Exhibition

1. Manage the design of the exhibition space, including size and placement of booths and custom stands, in consultation with the Asian Development Bank and host



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country. Be willing to work with preferred suppliers if directed by the Asian Development Bank and host country.

2. Provide all necessary information to exhibitors to assist them in planning and preparation.
3. Manage the exhibition logistics directly with all the exhibition sub-contractors including floor plan management, booth construction and dismantling, furniture hire, internet provision and power requirements. Be willing to work with preferred providers if directed by the Asian Development Bank and host country.

Annual meeting Collateral

1. Prepare and print the delegate handbook for the annual meeting, containing program and sponsor information and other information as agreed with the Asian Development Bank and host country.
2. Collect collateral from sponsors and others to be distributed to delegates. Collate material for delegates.
3. In consultation with the Asian Development Bank and host country and in accordance with the sponsorship prospectus, arrange for the production, design and distribution for the annual meeting satchels, shirts and other branded collateral.
4. If required, prepare and include a final printed delegate list with the annual meeting collateral to be distributed to delegates (consistent with privacy requirements).
5. Organise the collection and distribution of annual meeting electronic collateral. Test any media for viruses before distributing.
6. Distribute satchel and annual meeting collateral to delegates at the annual meeting (usually upon registration).

Tours and Tourist Information

1. Liaise with the Asian Development Bank and host country on requirements for any professional tours offered in association with each annual meeting.
2. Ensure that information and booking facilities for commercial tours and other tourist information is available online and in information packages.
3. Liaise with tour operators and other tourist venues and services, for example to arrange for concession rates for group theatre bookings and other events.

Onsite Services

1. Act as the main liaison with the venue management and all sub-contractors including caterers, audio visual and exhibition hire companies, to ensure the smooth running of all aspects of the annual meeting and exhibition



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2. Operate a desk throughout the event for delegate in-person registration and for responding to queries
3. Provide facilities for delegates, for example, phone, fax, e-mail, internet cafe, copying, bookings and tourist information
4. Make announcements, such as notifications when sessions are about to begin
5. Ensure all onsite staff are fully briefed and trained
6. Assist speakers and VIPs with their onsite requirements
7. Assist sponsors and exhibitors with their onsite requirements

Transport and Logistics Management

1. Transportation and traffic management across the venues
2. Transfers and chauffer driven cars coordination and management
3. Organisation of all shuttle busses across the annual meeting and all related venues and hotels.
4. Management of schedules and itineraries to and from the airport, the hotels and all venue(s).

Personnel Requirements (Volunteers)

1. Sourcing of volunteers from within the local community to assist with event operations and across all venues, hotels and conference centres
2. Briefing, management, scheduling and coordination of the volunteers across the project
3. Ensuring volunteers are paid, if a stipend is agreed to between the PCO and the Asian Development Bank and host country
4. Provision of food, water and sunscreen for all volunteers
5. Ensuring volunteers are covered by relevant insurances
6. Provision of uniforms for all personnel

Sustainability

1. Ensuring that the sustainability priorities listed in the green book are adhered to throughout the annual meeting
2. Ensuring all event materials are recyclable and that recycle bins are provided onsite at the annual meeting
3. Going paperless where feasible
4. Sourcing suppliers and gifts that are compliant with sustainable practices where possible



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Post Annual meeting

1. Within three months of the end of the annual meeting provide reports to the Asian Development Bank and host country included but not limited to:
2. Statistical information relating to annual meeting delegates attendance numbers, including a percentage breakdown by delegate categories
3. Statistics on the number of delegates attending each session, workshop and social functions
4. Booked accommodation statistical information
5. Assessment of the marketing and promotion of the annual meeting
6. Details of all sponsors and exhibitors in Excel format, including company, primary contact name, contact details and level of sponsorship
7. Sponsorship and exhibition summary and analysis
8. Financial details for income, expenses, sponsorship income, exhibition income
9. Copies of all promotional material, graphic design elements and announcements produced for the annual meeting
10. Information collected from delegate evaluation survey
11. Information collected from sponsor/exhibitor evaluation survey
12. A report giving details of surplus/loss compared with budget from the annual meeting and all financial records

Financial Management

1. Prepare an itemised annual meeting budget in Excel format, including how figures are calculated, for approval by The Asian Development Bank and the host country and provide regular updates on expenses and income tracked against this budget
2. Manage the annual meeting within budget or to a surplus target agreed with the Asian Development Bank and host country
3. Obtain quotes for budgeted items and negotiate purchases as agreed with the Asian Development Bank and host country
4. Remit payment for annual meeting outgoings on behalf of the annual meeting
5. Provide a complete and accurate list in Excel format of all outgoings and incomings to the Asian Development Bank and host country
6. Provide all bookkeeping and accounting services to the annual meeting
7. If requested, cooperate and assist with an audit of the annual meeting account by the Asian Development Bank and the host country or by a third party nominated
8. Follow up all outstanding debts within three months after the annual meeting
9. Provide a final reconciliation of income and expenditure and transfer any surplus to the Asian Development Bank or the host country nominated account within three months after the annual meeting
10. Manage issues related to international currencies and taxation requirements



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In addition:

1. Finalise all banking and credit card accounting and produce a final budget and account reconciliation report
2. In consultation with the Asian Development Bank and host country, prepare thank you letters for all key individuals