



## MedInfo2023 Bidding Documentation and Guidelines

*IMIA Standard Operating Procedure*

*Governing Policy: MedInfo*

*Revision: February 2019*

### **Goals and objectives:**

**Goal:** The goal of this document is to provide a standard operating procedure for bidding by IMIA Society Members to host a MedInfo congress and to collect meaningful information to aid in the selection of the winning bid.

### **Objectives include:**

- To facilitate a transparent selection process
- To ensure clarity as to expectations and requirements for both IMIA and the bidding society
- To establish understanding and trust between the successful bidding society and IMIA.

### **Important Note:**

*In order to enable comparison between the bids by different societies, it is necessary to have standardized data collection and bidding procedures. Societies are asked to use the following data collection structure.*

*Bidding Societies should note that IMIA has entered a long-term agreement with IOS Press on the publication of MedInfo proceedings that will affect societies hosting MedInfo.*

*The final arrangements in some areas will be subject to detailed discussions between IMIA and the Society with the successful bid prior to finalization of the contract between the society with the successful bid and IMIA.*

## Table of Contents

### Part I - Proposal and society profile

The purpose of Part I is to ascertain the experience and demonstrated capability of the bidding society to host an international congress and to assess any potential risk factors associated with the society's proposal.

- 1. Society's goals and objectives in bidding for MedInfo 2023**
- 2. Profile of the bidding Society or Association**
  - a. Membership and duration of existence
  - b. Financial stability
  - c. Society staffing
  - d. Society conference history and experience
- 3. Proposed dates and location for MedInfo**
  - a. Dates
  - b. City
  - c. Conference Facility
  - d. Accommodations
  - e. Travel Accessibility and Visa Requirements
- 4. National and Regional Support**
  - a. Government (national, regional, local) Support
  - b. Other Support
- 5. Proposed composition of Local Organizing Committee**
  - a. Membership
  - b. Committees
  - c. Chair

### PART II – Requirements & Obligations

The purpose of Part II is to identify and clarify IMIA's criteria and expectations for the bidding Society to avoid conflicts arising from potential misunderstandings or unrealistic expectations.

- 1. Financial Obligations**
  - a. Acknowledgement
  - b. Revenue Sharing
  - c. Funding of the Scientific Program and Editorial Committees
  - d. Congress Proceedings
  - e. Bursaries
- 2. Benefits to IMIA Institutional Members**
  - a. Congress Registration fees
  - b. Exhibit booth/stand space

### **3. Other Requirements**

- a. No conflict with other medical informatics meetings  
(If a society plans to use its own annual conference to host a MedInfo, the conference will be rebranded as MedInfo/Society's meeting (in this order))
- b. Congress theme
- c. Language
- d. Meeting Space
- e. Exhibit Space
- f. Congress Website
- g. On-line Registration
- h. Internet Access
- i. Academic Sponsorship Program
- j. Communication Strategy

### **4. IMIA Assistance**

- a. Publicity, Promotion, Marketing
- b. Electronic paper submission system

## **PART III – Tentative Budget Proposal**

The purpose of Part III is to identify the financial aspects of the proposal along with projected attendance estimates and to enable the review of the financial viability of the proposal.

1. Proposed Rates and Fees
  - a. Congress Registration Fees
  - b. Exhibit Booth Fees
2. Attendance/participation
  - a. Projected Number of Congress Participants
  - b. Projected Number of Exhibit Booths
3. Revenue Budget Proposal
  - a. Registration Revenue
  - b. Exhibit Revenue
  - c. Sponsorships/Patronage
  - d. Grants
  - e. Other
4. Expenses Budget Proposal
  - a. General Congress Expenses
  - b. Congress Program Expenses
  - c. Administrative Expenses
  - d. Exhibit Expenses
5. Proposed Net Congress Income
6. Social Programs

## **PART IV – Bid Summary**

### **PART I – Society Profile and Capabilities**

#### **1. Goals and objectives in successfully bidding for MedInfo 2023**

Please articulate why your Society desires to host MedInfo 2023 and how your successful bid will contribute to:

1. Your society's goals and objectives in respect to your country
2. Your country's neighbours and region
3. IMIA's goal to provide a venue for the promotion, assimilation, and dissemination of informatics knowledge to the international health informatics community.

#### **2. Profile of the bidding Society or Association**

##### **1. Membership and stability**

- a. Year that the society was founded
- b. Year that the society joined IMIA
- c. Number of current members
- d. Member composition (%)
  - i. Scientific and academic
  - ii. Health care professionals
  - iii. Other

##### **2. Financial stability**

- a. Provide current financial statements of the society
- b. Comment on the country's economic stability
  - i. Inflation rates
  - ii. Currency stability
  - iii. International currency transfer restrictions and taxes
  - iv. Presence of any international sanctions

##### **3. Society staffing**

- a. Does the society have a secretariat? If so, is the secretariat
  - Employed by the society?
  - Contracted by the society?
- b. How many full time equivalent staff?

##### **4. Society conference history and experience**

- a. Frequency of Society conferences/meetings
  - Annually
  - Twice Annually
  - Other (please specify)
- b. Conference profile (check as applicable)
  - Peer-reviewed scientific program
  - Presentations (not peer reviewed)
  - Workshops/tutorials
  - Conference Proceedings
  - Site Visits
  - Vendor exhibits

- Social Program
    - Accompanying Person's program
  - c. Participation and attendance (please indicate for the past three years)
    - i. Number of participants
    - ii. Number of exhibit booths/stands (where applicable)
    - iii. Total number of organized conference days per year
  - d. Conference Organization (please specify)
    - Organized by society staff
    - Contracted to professional organizers
  - e. Vendor exhibits (where applicable)
    - Organized by society staff
    - Contracted to professional organizers

### 3. Proposed dates and location for MedInfo

#### Notes:

- *As decided by the IMIA General Assembly at its 2009 meeting in Hiroshima, Japan, it is expected that MedInfo will be held in the last 10 days of August. IMIA will consider an alternative time frame in the bid, however any changes to this time frame will be at the approval of the IMIA General Assembly.*
- *Typically, a MedInfo is a 5-day event consisting of 2 days of pre-MedInfo workshops, meetings and tutorials followed by a 3 day MedInfo Congress.*
- *The proposed hosting city should (where possible) be a "gateway city" for international airlines to minimize travel inconvenience and costs for participants.*
- *Normal prevailing weather conditions should be taken into account in the selection of the host city and the proposed dates.*
- *The venue of the MedInfo congress should be within a reasonable distance from the accommodations booked for participants and should be accessible by safe and reliable public transportation.*
- *Provision for a variety of hotel accommodations including low-cost accommodation must be made.*

**1. Dates Proposed:** Indicate the dates proposed for the 2023 MedInfo Conference

#### 2. Location

- a. City proposed:
- b. Provide details as to:
  - i. Demographics, climate, public safety, and other like information
  - ii. Access via
    - 1. Air
    - 2. Trains and other public transport
    - 3. High speed roads
  - iii. The city's attractions and cultural attributes
- c. Conference Facility proposed:

- d. Provide details as to:
  - i. Number of concurrent “tracks” or sessions that can be accommodated along with meeting room capacities
  - ii. Availability of Plenary and semi-plenary session rooms and their capacities
  - iii. Availability of meeting rooms
  - iv. Availability of exhibit space indicating the number of booths or stands.
  - v. Provision for space for lunches, breaks etc.
  - vi. Proximity to accommodation for participants
- e. Accommodations
  - i. Do you propose (please specify)
    - A “conference hotel” associated with the convention center (please indicate room block and current rates).
    - A selection of hotels for participants  
If the latter, please provide a schedule of potential hotels, their room availability, and current and expected room rates.

#### 4. National and Regional Support

##### 1. Government Support

- a. Is your Society’s bid supported by (please specify as relevant):
  - The proposed host city’s Tourism & Economic Development Department or Chamber of Commerce
  - Your state/provincial Government
  - Your National Government or federal agencies
- b. If your bid is successful, what is the nature of this support (please provide supporting documentation)
  - Moral support
  - Contributions in kind (promotional material, etc.)
  - Grant funding assistance

##### 2. Other Support

- a. Is your Society’s bid supported by (please specify):
  - Your IMIA Region (where applicable)
  - Related health informatics associations
  - Computer, Wireless, Internet, and like industry associations.
  - National Information Technology trade associations
- b. If your bid is successful, what is the nature of this support (please provide supporting documentation)
  - Moral support
  - Contributions in kind (promotional material, etc.)
  - Funding Assistance

#### 5. Proposed composition of Local Organizing Committee

- 1. Provide a list of your proposed members of the Local Organizing Committee (LOC) including:
  - Name

- Organization by whom the individual is employed
  - Organizational title
  - Role within the committee
2. Where a committee structure is proposed, please identify:
- The names of the committees
  - Their role in the organization of MedInfo.
3. Please indicate the proposed Chair of the Organizing Committee and the vice-chair or alternate of the Organizing Committee.

*Please note that the proposed Chair will be expected to act as the official liaison with the MedInfo Steering Committee and the IMIA Board, and shall be deemed to be the official representative of the host Society in respect to all matters pertaining to the MedInfo Congress. The LOC chair must be fluent in English.*

## Part II - Requirements & Obligations

### 1. Financial Obligations

The bid proposal for MedInfo 2023 shall include the following:

**a. Acknowledgment** on the part of the bidding Society that IMIA has no financial, legal, contractual obligation, or liability with respect to organizing or conducting the Congress.

**b. Revenue Sharing**

*Note: in order to compare bids, bidding Societies are asked to structure this section on the basis of this traditional model. However, bidding Societies should note that, due to the transition in MedInfo arrangements, the precise revenue sharing model may be different, and will be subject to contractual discussions and agreement between IMIA the successful Society.*

Subject to a minimum guarantee of \$US 60,000.00 the bidding Society agrees to share revenues in accordance with the following. Revenues shared with IMIA are listed as net revenues not subject to any sales, value-added, or other taxes. This includes any charges in the transfer of money to IMIA.

**i. Congress Registration fees (see note below)**

Exclusive of pre or post congress workshops or tutorials, social programs, or accompanying person's programs:

1. 10% of registration fees for the first \$US 500,000 before expenses and taxes; plus
2. 12.5% of registration fees for the next \$US 250,000 before expenses and taxes; plus
3. 15% of any registration revenues exceeding \$US 750,000 before expenses and taxes

**ii. Exhibit Revenue**

Defined as the exhibit fees paid by exhibitors for booth space during the period of the Congress:

1. 10 % of gross revenue

**iii. Pre-congress and Congress Workshop and Tutorial Revenue**

Defined as fees for educational sessions which are not included in the Congress Registration Fee:

1. 10% of gross revenue

**c. Payment Schedule**

1. 80 % of the fees constituting the revenue sharing (including the guaranteed minimum) shall be paid to IMIA within 90 days of the conclusion of the congress.
2. The balance shall be paid by March 31, of the following calendar year.
3. The initial payment must be accompanied by a supporting schedule; the final payment must be accompanied by a schedule certified by the Society's auditors.

**d. Funding of the Scientific Program and Editorial Committees**

i. The hosting Society is obligated to provide funding for expenses incurred by the Scientific Program Committee (SPC) and the Editorial Committee (EC):

1. Meeting travel and associated expenses
2. Administration of the electronic paper submission system
3. Awards for the best papers, posters and the best students' papers
4. Editing of conference submissions

ii. The budget allocation of these funds will be determined by the Core Team of the SPC and shall be administered by the IMIA Secretariat.

iii. The amount of this funding is fixed at \$US 95,000.00 for MedInfo 2023.

iv. The transfer of these funds to IMIA will be timed in conjunction with the meeting schedules of the SPC and EC.

**e. Congress Proceedings**

*Note: MedInfo proceedings are now fully electronic and open access, and IMIA has an umbrella agreement with a publisher that includes future proceedings.*

*However, bidders must ensure that the costs of the proceedings are included in their budget.*

i. All MedInfo congresses are required to produce proceedings, through IOS Press, as mentioned earlier in this document, so to meet the standards to be indexed by the NLM's Medline process. Proceedings shall be made available in formats that meet this requirement no later than one week before the congress.

ii. The financial component of the contract between the publisher shall be borne by the hosting Society

iii. The copyright of the Proceedings shall be held jointly between the publisher, the host Society, and IMIA.

**f. Bursaries**

i. The hosting society shall make \$US 20,000.00 available for bursaries.

ii. The selection of recipients of the bursaries and the specific amounts for individuals shall be the responsibility of the SPC Core team, giving due regard to the recommendations and proposals of the OC.

**2. Benefits to IMIA Institutional Members**

In order to enhance the value proposition to the Institutional members of IMIA, a discount of 10% for IMIA Academic and Corporate members shall be applied to:

- a. Congress registration fees
- b. Exhibit Booth/Stand space
- c. This discount does not apply to:
  - i. Workshop and Tutorial fees
  - ii. Social events

### 3. Other requirements

#### a. No Meeting Conflict

- i. The bidding Society shall warrant that it will forfeit or co-locate its annual meeting (where applicable) during the year of the MedInfo Congress.

#### b. Congress Theme

- i. The hosting Society is entitled to establish the Congress theme.

#### c. Language

- i. The working language of a MedInfo Congress is English; accordingly, all documentation, websites, promotional literature must be available in English.
- ii. Likewise, staff at the congress interacting with participants must be reasonably fluent in the English language.
- iii. Any simultaneous translation requirements are the responsibility of the hosting society.

#### d. Meeting Space

The hosting society shall make meeting rooms available to IMIA at no charge as follows:

- i. Meetings of the IMIA Board, along with lunch and break facilities.
- ii. Meetings of the IMIA General Assembly, along with lunch and break facilities.
- iii. Meetings of IMIA Working and Special Interest Groups (*note all IMIA WG and SIG groups are listed on the IMIA website, for reference as to how many potential meetings rooms might be required*)
- iv. Meetings of the Editorial Boards of IMIA official journals
- v. Limited ad-hoc meetings

#### e. Exhibit Space

- i. One exhibit booth or stand will be made available to IMIA at no charge.

#### f. Congress Website

- i. The hosting society, in conjunction with IMIA, shall construct a website specific to the Congress.
- ii. The website must host all information relevant to the congress including;
  1. General Information including:
    - a. Call for participation
    - b. Call for papers
    - c. Timelines and schedules
    - d. Preliminary and final program
  2. Sponsorship and exhibit opportunities including;
    - a. Exhibit floor map
    - b. Exhibitor's application forms
    - c. Fee schedule
  3. On-line registration (see h. below)
    - a. Fee schedule
    - b. Timelines for special rates

4. Access to IMIA's paper submission system (see 4.b below) and Instructions to authors

**g. On-line registration**

- i. The hosting society, in conjunction with IMIA, shall arrange for access to an on-line registration system to accommodate the registration of participants for:
  1. The congress
  2. Workshops and tutorials
  3. Social events and other like opportunities
- ii. The registration system must be able to accommodate secure online processing of credit card payments as well as alternative payment options such as bank drafts, checks, and bank transfers.

**h. Internet access**

- i. Provision must be made for participants to have access to the Internet during the opening hours of the congress.

**i. Academic Sponsorship Program**

- i. The hosting society is encouraged to promote an Academic Sponsorship Program based on the model previously established at MedInfo 2004.

**j. Communication Strategy**

- i. The hosting society must have a clear strategy for the promotion of the conference, including use of media such as email, the Web, and outreach e.g. by a presence at major national and international conferences in the period leading up to MedInfo.
- ii. The hosting society's communication strategy must pay specific attention to communication of key announcements such as the call for papers by the Scientific Committee, calls for tutorials, and calls for participation.
- iii. The communication strategy should explain how it will target key organizations including potential sponsors e.g. industry or NGOs such as WHO and potential attendees e.g. health informatics organizations, related clinical organizations.

**4. IMIA Assistance**

**a. Publicity, Promotion, Marketing**

IMIA shall provide assistance to the successful bidding society by way of:

- i. Broad and focused publicity of the MedInfo Congress on its website and literature.
- ii. Extensive use of its distribution lists for announcements, updates, and marketing materials.
- iii. Active promotion of member-based activities and programs in conjunction with MedInfo.
- iv. IMIA shall not support or sponsor any programs or congresses other than those of its working and special interest groups during the year of the MedInfo.

**b. Electronic paper submission system**

- i. IMIA shall provide for an electronic paper submission system for the SPC and EC.
- ii. The funding for the administration of the system will be provided by IMIA from the SPC budget allocation identified in 1.c

*Note – Conference Registration Fees:*

**1. General Principle**

For the purposes of the agreement between IMIA and the hosting society, all congress participants must pay registration fees with the exception of members of the:

- a. Organizing Committee
- b. Scientific Program Chairs
- c. Editorial Committee
- d. Staff members of the Society and IMIA
- e. IMIA board members not included in any other category
- f. Invited and Keynote speakers
- g. A representative of the World Health Organization

**2. Discounts**

To recognize the benefit of membership, discounts may be provided to members of the hosting Society and IMIA Institutional Members as specified. Discounts should be provided also to the Scientific Program Committee Members.

## **PART III – Tentative Budget Proposal**

The tentative budget proposal should include the following:

### **1. Proposed Rates & Fees**

- a. Congress Registration Fees
  - i. Early Bird
  - ii. Regular
  - iii. On-site
  - iv. Student
- b. Exhibit Booth Fees

### **2. Attendance/Participation**

- a. Number of Congress Participants
  - i. Break–even
  - ii. Optimal
  - iii. Budget
- b. Number of Exhibit Booths/Stands
  - i. Break–even
  - ii. Optimal
  - iii. Budget

### **3. Revenue Budget Proposal**

- a. Congress Registration Revenue
- b. Exhibit Booth Revenue
- c. Congress Proceedings
- d. Sponsorships/Patronage
- e. Grants
- f. Other
- g. Total

### **4. Expense Budget Proposal**

- a. General Congress Expenses
  - i. Facility & Meeting Space
  - ii. Catering (breaks, Lunches)
  - iii. Congress Management
  - iv. Internet Access
  - v. Signage
  - vi. Registration system
  - vii. Badges, bags etc
  - viii. Other Congress expenses
- b. Congress Program Expenses
  - i. Keynote & invited Speakers
  - ii. SPC/EC Support
  - iii. Bursaries
  - iv. Audio Visual
  - v. Proceedings
  - vi. Preliminary & Final Program

- vii. Poster session expenses
- viii. Other Congress Program Expenses

- c. Administrative Expenses
  - i. OC expenses
  - ii. Promotional literature
  - iii. Marketing Expenses
  - iv. Website construction and maintenance
  - v. Staffing
  - vi. Telephone, Fax etc.
  - vii. Supplies
  - viii. Other Administrative Expenses
- b. Exhibit Expenses
  - i. Exhibit Management
  - ii. Exhibit Floor Space
  - iii. Booths, Carpeting, etc.
  - iv. Exhibitor's Guide
  - v. Other Exhibit Expenses
- c. Total Expenses

## 5. Proposed Net Congress Income

## 6. Social Programs

- a. Welcoming Reception
  - i. Revenue
  - ii. Expenses
  - iii. Net Income (loss)
- b. Gala Dinner
  - i. Revenue
  - ii. Expenses
  - iii. Net Income (loss)
- c. Other (specify)
  - i. Revenue
  - ii. Expenses
  - iii. Net Income (loss)

### **Notes:**

#### **Workshops & Tutorials**

*It is expected that insufficient information is available to budget for this item, normally these are planned to produce a small profit or break-even*

#### **Tours, Site Visits**

*These events are out of scope for consideration from a financial perspective*

## PART IV – Bid Summary

In a concise table, summarize the following details extracted from your bid:

<b>Part I: Society profile and capabilities</b>	<b>Society Name, URL</b>
President	Name, email
Membership and stability	When established and joined IMIA. Number members, % clinicians, % academic, % others. Period over which financially stable
Society conference history and experience	Which conferences organized, number of attendees
Proposed LOC chair	Name, email
Proposed MedInfo 2023 dates	
Location	
Conference facility	Name URL Plenary room size Parallel session rooms: number and size Exhibition space: in square meters Small meeting rooms: how many
Experience with large conferences	Largest conferences hosted – name and number attendees
Accommodations	Number hotel rooms in host city, rooms from US\$X (1*) to \$Y (5*)
Government support	Name of individual, Department. Nature of support in \$US
Other support	List other organizations supporting bid

<b>Part II: Requirements and obligations</b>	
Funds budgeted for SPC and EC (excluding printing costs)	US\$
Funds budgeted for Congress proceedings	US\$
Funds budgeted for Bursaries	US\$
Benefits to IMIA institutional members	% discount for registration fees and exhibit space.
No meeting conflict	Will you have an annual meeting as well as MedInfo in 2023?
Meeting space	What will be available at no charge for IMIA Board, GA, WG and SIG.
Communication strategy	Key elements.

<b>Part III: Budget proposal</b>	
Proposed rates & fees	Early bird: US\$ Regular: US\$ Student: US\$ Average: US\$
Attendance levels (number of participants needed)	Break-even: Budget: Optimal: .
Costs	Fixed costs: US\$ Cost/participant: US\$
Exhibition and other revenues	Break-even: X sq m 2'000 sq m: \$US
Revenue at 1600 participants, ~2000 sq m, (excl. VAT)	Revenue: \$US Expenses: \$US Profit: \$US
Profit per participant	\$US
Result - for 1000 participants - for 1200 participants - for 1400 participants - for 1600 participants - for 1800 participants - for 2000 participants	Profit/loss \$US Profit/loss \$US Profit/loss \$US Profit/loss \$US Profit/loss \$US Profit/loss \$US

<b>Part IV: The participant's perspective</b>	
Budget from New York (economy travel+6 days in 4* hotel+early registration)	\$fare+ \$accom+\$reg = \$total
Budget from Paris (economy travel+6 days in 4* hotel+early registration)	\$fare+ \$accom+\$reg = \$total
Budget from Tokyo (economy travel+6 days in 4* hotel+early registration)	\$fare+ \$accom+\$reg = \$total
Climate	X°C average, Season
Accompanying persons programmes	Brief Summary
Pre- and post-tours	Brief Summary