

THE WORLD ORCHID CONFERENCE

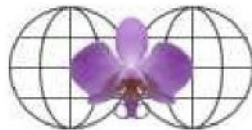
Guidelines

For

Prospective Hosts and Organizers

Of

World Orchid Conferences



The World Orchid Conference Trust
Revised 20 February 2017

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1. The WOC Trust and History of the WOC

1.1 The WOC Trust

The World Orchid Conference Trust (WOC Trust) was established with its headquarters in Bermuda in 1988. The Trustees are two representatives nominated by the American Orchid Society (AOS), two nominated by the Royal Horticultural Society (RHS) plus the Appleby Trust (Bermuda) Limited, Bermuda. The Trust meets at least annually and the Trustees stay in contact electronically between meetings.

Website: www.woctrust.org

The Trustees are:

AOS	Dr. Alec Pridgeon Ms. Sandra Tillisch Svoboda	apridg1@gmail.com stillisch@cox.net
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1.2 History of the WOC

The Conference takes place once every three years. The first Conference was held in St. Louis, Missouri, USA, in 1954. The 20th Conference was held Singapore in 2011 as was the 4th in 1963. The other Conferences have been held in Honolulu, London, Singapore, Long Beach, Sydney, Medellin, Frankfurt, Bangkok, Durban, Tokyo, Auckland, Glasgow, Rio de Janeiro, Vancouver, Shah Alam, Dijon and twice in Miami. The 21st was held in Sandton, Johannesburg, South Africa, in 2014. The

22nd has been awarded to Guayaquil, Ecuador. The 23rd has been provisionally awarded to Taipei, Taiwan.

In the Northern Hemisphere, the Conference usually takes place in March-May, in the Southern Hemisphere usually in September-November.

Inquiries about hosting the 23rd WOC in 2020 are now welcome and should be addressed to the President of the Trust, Ms. Sandra Tillisch Svoboda with contact information found on page 3. Bids are due no later than 15 September, 2017.

1.3 Role of WOC Trustees

The primary role of the WOC Trustees is to ensure continuity of this long-running series of international events. The Trustees are responsible for the choice of sites for future conferences, and for making sure that each event happens, follows an agreed format, and is enjoyed by all participants. They are each committed to the task, at no little personal expense, and may also be involved as registrants, lecturers, judges or exhibitors in their own right.

To ensure continuity they usually arrive early, before the Conference as a whole begins, and stay until after the closure. They need to have access to the whole venue throughout this period, especially to monitor various aspects during set-up and judging. During the Conference and Show they will have access as registrants. During the break down they may also wish to be present. Organizing Committees are requested to make sure that Trustees are kept up to date with any last-minute changes so that they can be useful and helpful to all concerned.

The Trustees are often highly respected judges and may well have been selected to participate in Show and Plant judging, but if this is not the case it is essential that they are invited as observers to the judging of higher medals and trophies and to any other *ad hoc* deliberations regarding judging.

The WOC Trustees are invariably experienced participants and deeply concerned about the success of each Conference. In addition to maintaining the Trust Fund and making sure the limited resources are wisely used, they are prepared to offer advice and share the knowledge acquired from the many conferences they have attended. Their wish and need to help is repeated in several places throughout these Guidelines. It cannot be over-emphasized that they have the responsibility, the know-how, and the desire to make sure everything goes smoothly.

These are Guidelines, not rules or regulations, and it is hoped that they will be used in the spirit in which they are offered to all those involved in inviting and staging a WOC.

Please do consult the President and WOC Trustees at any time.

2. World Orchid Conference Details

2.1 Schedule of Events

The Conference has three main parts: The Conference itself (centrally a program of lectures), the show, and the social program. This framework is a constant feature of all Conferences, whatever local variations may occur. It lasts approximately a week, but organizers will need to allow for time before and after for the setting up and taking down of the show. A typical schedule in outline is as follows:

tba	Commence Setting Up (See Monday)
Sunday/Monday	Registrants arrive
Monday	Completion of setting up
Tuesday	Judges' breakfast followed by judging Opening Reception in the evening
Wednesday	Lecture program, 0900-1700
Thursday	Lecture program, 0900-1700 Main social event in the evening
Friday	Lecture program, 0900-1700
Saturday	Lecture program, 0900-1600 Closing Ceremony, 1600-1645 Normally Closing Dinner or Banquet
Sunday	Registrants depart Post-Conference tours begin

At a World Orchid Conference there are a number of international committees which meet and for which space in the time-table must be found: the **WOC Trust, the Trust-invited Site Selection Committee, the International Orchid Committee (IOC), and some committees of the Orchid Specialist Group (OSG) of the IUCN Species Survival Commission.** International Alliances of interest in certain genera, e.g., *Phalaenopsis*, *Pleurothallid*, and others sometimes wish to meet. The size and set up of rooms for these meetings vary and it is suggested that the Organizers coordinate the requirements with representatives of the groups. WOC Trustees will be able to give you current contact information for the various groups. As the membership of these key international committees has a lot of overlaps, they must be scheduled at different times, preferably immediately after the lecture program each day except for the Site Selection Committee which needs to meet the morning of the Closing Ceremony day. The organizers and the President of the Trust will need to coordinate who will be included on the Site Selection Committee so there will not be any conflicts between that meeting and the lecture schedule. There may also be an informal meeting of the Trust to introduce the members of the Site Selection Committee to the WOC bidders.

2.2 The Lecture Program

The Conference proper—the lecture program—typically runs for 3.5 days, Wednesday to Saturday. Details have varied, but typically there are three simultaneous series of lectures: one scientific, one slanted towards the orchid hobbyist, and one covering the large number of specialist interests and groups which are a feature of the orchid world internationally. It is important to keep a balance between these different parts of the program.

Some organizing groups might not have a great deal of experience in handling multi-day, simultaneous lecture programs so the Trust is happy to offer assistance. A panel of advisors with at least one of the Trustees on it is suggested. This panel needs to be formed at least 2.5 years prior to the Conference so it is important that organizers request help approximately 3 years before the event is to take place.

It is vital that no scheduled presentation starts prior to the time set aside for it as well as ensuring that all lectures not be allowed to go over the scheduled time. Many registrants plan their days around the published schedule and are unhappy if it is not followed.

Typically, the first morning of lectures does not have simultaneous presentations and is held in the largest of the lecture facilities. This allows opening remarks by the Organizers and two or three Keynote addresses by well-known and popular orchid speakers.

If a host organization is agreeable, the Trust will sponsor, up to \$1,000.00, one or more speakers at the conference as long as the following criteria are met: 1) the organizers agree to publicize the speaker(s) as World Orchid Conference Trust sponsored from the time the speaker(s) is(are) selected; 2) the speaker(s) have not made presentations to any previous World Orchid Conference and might not be able to attend without sponsorship; and 3) the Trustees of the Trust are provided with the name(s) and agree with the organizers choice(s) prior to any notification to the selected speaker(s). It is anticipated that the President of the Trust will act as Chairman of the session(s) when the sponsored person(s) appears.

Organizers are responsible for ensuring that the lecture hall capacities are adequate to accommodate all registrants interested in attending. While some WOCs have been able to get by with rooms that held some 150 to 250 seats, others, and certain speakers, have needed far more.

Developments in audio visual techniques change constantly. The Organizers should communicate frequently with the speakers to determine what technical format each would like to use during their lectures. Properly-lit lecterns, good projection and sound equipment, remote controls, and back-up facilities should be available.

In planning the third ("special interests") series, consultation with the appropriate groups (e.g., the International *Phalaenopsis* Alliance, the *Pleurothallid* Alliance, etc.) is important; and, in practice, much of the detailed planning might in some cases be left to the groups themselves to decide. However, the choice of speakers in the "scientific" and "hobbyist" series requires very careful selection by the Conference organizers and is one of their main responsibilities.

Speakers should be chosen because they are good speakers and because they have something valuable or important to contribute, not because (for example) they volunteer to speak or because they have spoken in previous Conferences. The highest standards are required with a good international range of speakers. Wide consultation internationally is recommended well in advance before any invitations to speak are issued. This is one area in which the Trust's advice will, in many cases, be invaluable, and organizers are recommended to ask for it. **Speakers, particularly academicians, should be invited no later than 18 months prior to the Conference in order that they may accommodate the Conference in their busy schedules.**

Students and young scientists can play an important role in a Conference. They are often keen, dedicated, and are the future for orchid science and horticulture. The World Orchid Conference Trust strongly encourages organizers to include this group in their plans. To get permission from their institutions to attend a conference and to apply for funding these young scientists normally need an invitation from the Conference organizing committee to participate either as a lecturer or to present a 'Poster' (see below).

In addition, organizers may wish to provide a session in the lecture program set aside for people early in their career. These presentations could be short and varied but will add an extra dimension to the conference program. It is important that these papers are published in the Proceedings.

The Trustees can offer advice on developing this link with scientists, and organizers are also urged to liaise with the OSG Early Career Committee (www.orchidconservation.org/osg/).

Invitations to speak should be accompanied by details of the technical aids (projectors, etc.) that will be available, or speakers may be invited to state their requests. Neither facilities nor requests should be changed after invitations have been accepted.

The aim in the scientific series should be to bring forward people doing new work. This does not mean that there is no room for other speakers who may give lectures reviewing a topic: a balance is desirable, especially to attract the interest of registrants who are not scientists. The aim in the hobbyist series should be to cover as wide a range of the main hobbyist interests as possible.

It is natural that the balance in the program should reflect the special orchid interests of the host country or region. Indeed, that is expected by international registrants and will be welcomed by them.

It has been traditional for the language of the Conference to be English and for all lectures to be given in that language. It is quite possible that in some countries lectures should be given in other languages, but then simultaneous translation at least into English should be provided. The same, of course, applies to the general proceedings of the Conference. English the language best understood by most participants in World Orchid Conferences, it is the policy of the Trust that this should not prevent the Conference from taking place in suitable locations where English is not widely spoken.

2.3 Scientific Posters

Recent WOC's have included very successful poster displays presenting a fascinating variety of research, covering scientific, horticultural, and conservation topics. It is recommended that this be an integral part of the Conference to help accommodate young researchers and groups of workers, as well as offering an opportunity for others, since not everyone can be invited to speak in the lecture program. There are always a number of scientists and others who have something interesting to present and would welcome the chance to participate in this way. In Dijon a panel of senior scientists judged more than 50 posters for their presentation, scientific content, and the innovation of their work. Book prizes were presented by the Trust for the best posters. No judging took place in Miami while Singapore had an extensive poster display and the Trust awarded a trophy for the best poster. It is up to the organizers to decide how posters, if any, should be presented and managed, but the Trustees hope that this valuable component of the Conference program will be continued.

2.4 The World Orchid Show

The show should be a large one and needs to be carefully designed. Because of expense, customs and phytosanitary restrictions, and other factors, overseas exhibits will commonly be limited in number and in size. That depends a great deal on the regional location, but in most cases a majority of the show may be expected to come from the host country.

The show has had to be staged in a separate facility from the lecture program, however, it is obviously best if the show and the lectures can be as close together as possible. If the main hotel can be close to the show and to the lectures as well, that is better still. But if the hotel accommodation can only be close to one or the other, then it is more important to have it close to the lectures than to the show.

Often there is a "Conference Hotel" which provides a location for the lecture program and other meetings.

It is essential that the organizers make clear and reliable arrangements with their Customs, plant health and CITES authorities to facilitate both the bringing in of plants for exhibition and/or sale and their subsequent export (*or re-export*) by both exhibitors and other registrant. Such arrangements should be both made and publicized internationally a long time—say a year—in advance. Organizers must realize that exhibitors from abroad will not commit themselves to bringing in plants until they know that proper and reliable arrangements have been made. This is not something that can be left to the last minute.

Practice on charging has varied a good deal, but in Glasgow, for instance, no charge was made for space in the show, while a charge was made for space in a (separate) sales area, with exhibitors being given free or discounted sales space in proportion to the size of their exhibit in the show.

The sales area is an important part of the show as it is of great interest to registrants and visitors. While plants predominate, other orchid-related lines of merchandise, sundries, pictures, ceramics, books, textiles, etc., can be included. Indeed, Conference organizers have a wide discretion in what they admit to the sales area. ***Because it is undesirable for security reasons for registrants or members of the public to take purchased plants into the show, it is good to have a "crèche" room or plant hotel, where things which people have purchased can be left for temporary safekeeping.***

The show should be designed to appeal not only to the registrants, but also to the public of the host location. The opening of the show to the public, usually for a fee, is an important element in the overall Conference budget. In the three most recent Conferences, locally publicizing locally of a World Orchid Show has been important.

It has been the practice to allow registrants who are photographers to enter the Show before the opening, one or two hours each morning, for photographic purposes. It is usually impossible to set up tripods, use flash, etc., when the Show is open to the public.

2.5 Judging

There is an important competitive element to the show: the business of judging is traditionally one of the main features of the Conference and judges often make up an important proportion of registrants. Details vary, but both Medal and Ribbon judging of individual plants is done and there is judging of exhibits. World Orchid Conference prizes shall be limited to medals, ribbons and trophies; and while they, along with judging handbooks are a major expense for hosts, they are also very suitable candidates for sponsorship. Outside financial assistance could help ensure the high quality of the respective awards. Remember that many individuals will travel great distances so trophies, or the like, should not be overly fragile or heavy. It might be helpful, if organizers want to have elaborate trophies, for them to have a way to safely ship them to recipients following the WOC.

The organization of judging is a major task for the organizers; it is also a sensitive one. One problem: although large numbers of overseas registrants expect to be involved in the judging, not all those who apply have the right qualifications and experience. It is the responsibility of the organizers to decide who should be accepted, however, they need to take account of the fact that different countries use different systems for qualifying judges. Trustees can put organizers in touch with those responsible for the various international judging groups. It is strongly recommended that clear guidance is given on the qualifications required to judge and that an appeal procedure is in place. It is also wise to check accreditation well before judging starts.

Judges from different countries will be used to differing judging systems, and the system used at World Orchid Conferences must reflect that. The design of the schedule and the rules are a matter for the organizers and they bear the responsibility for choosing the method to be employed. If the host country has a well-known, established judging system, it may be used "as is" or with slight modifications. In other countries, it will be necessary to "borrow" a system or a combination of systems. WOC judging is a case on its own, and there is now quite a lot of experience about how it is best done. It could prove beneficial to seek the assistance of experienced people to help formulate the judging system and show schedule and to ask them for their advice and counsel throughout the planning and execution of the WOC. Recent conferences have benefited from the advice of a designated group of international advisers. This is one area where assistance is available from the Trust.

It is important that the method of judging be formalized by the host and publicized well before the actual conference. A comprehensive show schedule is available from the Trust. There is very little chance that all the classes listed in it will be needed for any individual show. Location of the WOC, the time of year it is to be held, and the quantity of plants that might be entered in various classes must be considered when determining which classes should be listed, grouped together, or excluded.

Conference registration packages should include: 1) a judge's form that asks for a prospective judge's qualifications; 2) which judging organization they belong to; 3) area of expertise the judge possesses; 4) any conflicts of interest that would preclude that judge from participating in certain classes; and 5) the level of conference registration that is needed to be able to judge. The privilege of judging at a WOC is expected to be matched by an appropriate contribution to its organization, and, up to now, judges have always been happy to pay the full registration fee. If there is to be a deadline for registering as a judge, that must be clearly stated.

A judging and entry manual should be provided for each judge and exhibitor. Judges often like to read the judging manual well before they arrive at the show.

The manual should cover as many details about exhibition and judging as possible such as: 1) how many classes a plant, flower, or exhibit may be entered in; 2) a clear definition of such terms as "miniature," "novelty," and "standard;" 3) whether plants and cut flowers may be combined in an exhibit; 4) whether an entry must be placed in the first applicable class; and 5) if there is any limit as to the number of entries an individual exhibitor can have in a class.

There are several show rules and regulations produced by different groups around the world. They are readily available and it is recommended that the hosts get copies to help them when they are developing their own.

The host determines whether individual plant and flower entries will be segregated from exhibits. Shows in Japan have been particularly successful with this approach, but there are other areas of the world where this will not work. Many of the commercial exhibitors would like to ensure that their best plants are in their exhibit, particularly those that travel long distances. When they have to spread many of their best entries amongst the individual entry areas, they feel they lose the impact they could create from having everything in their exhibit. This fragmentation could also affect the overall aesthetic impact of the show.

It is strongly urged that every plant in the show be eligible for competition. Although actual judging may take somewhat longer, it is felt the best plants should be recognized by the judges without regard to their location in the show.

It is important to consider judging all aspects of the show, including educational, art or craft exhibits, scientific posters, and any off-site displays; a recent conference even held a Website competition.

Hosts are encouraged to have exhibitors register plants and cut inflorescences that they feel warrant serious consideration for judging. Such registrations should be computerized, sorted by exhibit and judging team assignment, and made available by judging team so the team may easily locate entries of special interest. While this does not relieve the judging teams from review of all plants that fall within their area of responsibility, it ensures each exhibitor that his/her entries have not been inadvertently overlooked.

Exhibitors should be cautioned that they should not enter every plant they display, because it would seriously hamper the conduct of judging. Most exhibitors are experienced and know which plants/flowers are worthy of medal consideration.

Organization of judging involves a considerable amount of administration, and it is important to appoint a committed team of administrators to input data, produce lists, answer questions, and keep track of paperwork. A dedicated Judging Secretariat with appropriate data links and equipment is almost essential.

Lists of judging teams and their assignments should be conspicuously posted at several key locations as soon as possible and no later than one day before judging, preferably on separate lists sorted by judging teams and alphabetically by name. The lists should also indicate team leaders and clerks/stewards.

Hosts normally provide breakfast and/or lunch for the judges and clerks. It is convenient to have the judges' briefing during the breakfast period. Any last minute items can be passed along at this time. People can be reminded of important issues and deadlines, questions can be answered, and teams can formally meet. At this stage, judging teams can be given their assignment sheets, which should contain detailed information on groups to be judged, genera included, restrictions etc.

Some judges like the ability to reclassify entries if the team feels it necessary, and often they want to be able to expand a class when the quality and quantity dictate. It is nice to be able to accommodate these wishes but it is up to organizers to stipulate if this is allowable. If allowed, extra ribbons should be available.

Best in Show trophies for species, hybrid, exhibit, etc., are very prestigious and it is important that the awarding process is seen to be fair. **Most judges want to participate in the selection of the best exhibit and plant and organizers should adapt their judging procedures to allow all judges to do so. Some major shows have judges select winning plants from amongst groups and then have all the judges fill out a ballot to select the champion. The top exhibits could also be judged in a similar way.**

Adjustment of judging results can be useful. The organizers have a certain number of medals, ribbons, and other awards that are available, and they may feel it is important to award them all (or most of them). On the other hand, it is possible that the various judging teams may give more medals and awards than are available, so some group needs to review the situation and make additions or reductions as necessary. It also provides an opportunity to rectify possible oversights, to even-out results, and/or reward exhibits that were overlooked. If a ratification panel is used, it is essential to publicize this and carefully select the team. It is best if this team **adds** to the awards recommended by judging teams and does not reduce or take them away unless there are not enough awards available.

Award judging by the host organization in addition to World Orchid Conference judging (Dual system) is not recommended. A World Orchid Conference award, medal, or trophy should be the highest distinction available.

Exhibitors, judges, registrants, and the public want to be able to see a list of winning entries. The lists should be prepared and posted around the show site as soon as possible after judging. This is easier to do when a computerized entry program has been utilized. Several of these have been used quite successfully at major shows around the world. A listing on the conference website is useful and appreciated.

Ribbons for medals, class, and trophy winners can be placed by the winning plant or exhibit. It is also customary to issue metal medals for the winners which are given to the individuals as a permanent memento of their achievement. Trophies are often sponsored by individuals, companies, or Orchid Societies and are treasured by recipients. It is important to consider that trophies may have to be transported long distances and so should not be excessively heavy or fragile.

Organizers should determine how and when they want to present the major awards that arise from the judging. There are three very opportune times to do so—the opening social event that normally takes place the evening of judging day, the conference closing ceremony that follows the last lecture(s), and dinner or banquet. While it is up to the organizing group to determine when they want to make the various presentations, it is important that the recipients be present to accept if possible. It might be necessary to invite winners to a function that they have not signed up for or to present certain awards at the opening ceremony if the recipients are not going to remain at the WOC until the final day.

2.6 The Social Program

The social program is important. For many registrants, this is the occasion for a holiday, and they bring partners with them. It is an occasion for meeting up with old friends—an international get-together, with orchids as the focus, and the excuse. There is an established pattern of events during the week of the Conference, and there is also scope for associated tourism before and after the Conference.

It is usual to have three main social events for Registrants during the week of the Conference—1) an Opening Reception (in the show) on the evening of the day of judging, 2) a Closing Dinner or Banquet, and 3) on one of the intervening nights: a "local," i.e., Japanese, Scottish, etc., night. The Opening Reception should be free of charge for registrants and has often been hosted by the local public authorities of the host city. Depending upon the capacity of the site, organizers may allow non-registrants to attend (free or for an appropriate fee). It is good to have other kinds of social events arranged on the other nights as well, but these need not be on the same scale.

Many registrants and their accompanying partners will not want to spend all their time at the show or at lectures. It is important that arrangements for the Conference should be varied and provide interesting opportunities for doing other things during the week. In some cases, all that the organizers need to do is provide information about local attractions or events which are available in the locality. But they should also arrange a program of tours, both whole or half-day, tailored specifically to the interest of people attending the Conference. These may or may not be orchid-centered. Obviously, such things as nursery visits might be featured, but visits to such local attractions as historical sites or landscape features of general tourist interest are in order. The important thing is that these should be "Conference Tours" shared by and confined to those attending the Conference.

It is usual for the organizers to offer Registrants some pre-Conference and/or post-Conference tours, with the latter being the more important. These have ranged from two-day to two-week tours, and it is a matter for local judgment as to what is appropriate. There need not be too many tours offered, as many individuals and groups attending the Conference will in practice make their tourist arrangements in the country in other ways and through other tour operators. Most tours should include orchid related itineraries.

It is customary to provide facilities and a space in the program for the hosts of the following Conference to entertain interested registrants and to promote their event. It is, of course, up to the following hosts to arrange this, but the cooperation of the current hosts is welcomed.

2.7 The Closing Ceremony

A very important part of the Conference is the Closing Ceremony which should be scheduled as the last session on the afternoon of the lecture program's closing day. This time allows the organizers to "wrap up" the Conference portion of the WOC as well as offering the opportunity to present any principal prizes and awards that have not been scheduled to be given at some other function.

Reports will also be given by the Resolutions Committee (which will have been appointed by the WOC Trust), the International Orchid Committee, and the announcement of the choice of the prospective venue for the WOC to be held six years hence if a site was decided.

Lastly, this is an excellent time for the organizers of the WOC immediately following to formally invite everyone to attend their WOC and offer any details they care to share.

2.8 Proceedings of the Conference

A volume of Proceedings should be published as soon as possible after the Conference. It has become customary for this to be a substantial and high-quality publication, well-illustrated, and covering the full content of the lecture program, together with a record of other Conference proceedings, the show, and the social events. Organizers are advised to insist that Speakers provide the text of their lecture, in the form in which they wish it to appear in the Proceedings, **at the time of the Conference at the latest.**

The report of the Resolutions Committee and IOC must be included in the Proceedings. Additionally, the Trust would like to have a page in the book for promotion of future Conferences as well as offering historical information.

A separate charge, based on publication costs, is made, and registrants are usually offered a reduced charge if they subscribe for it before the end of the Conference. This is something that needs good publicity at the Conference. Experience shows that it is possible to finance the Proceedings on this basis, since there is considerable demand, even at a price, for a well-produced Conference souvenir.

3. Organization and Finance

3.1 Working Committee Organization

It is impossible to give specific advice about how best to structure the organization of the Conference, either in its preparatory stages or at the time when it takes place. Local circumstances differ. Experience shows that it is by no means unusual for the organization to change quite considerably over the 6-7 years that elapse between the initial decision to apply and the actual day of the Conference's opening.

Individuals may move in or out of the organization during that time, but the nature of the Conference is sufficiently well-established for certain key tasks to be readily identifiable, and the sooner the right people can be found to fill those key places in the organization, with a long-term commitment, the better. One of the first tasks of any organizing committee should be to identify those key posts, define their functions and allocate clear responsibilities to those chosen to fill them.

It is quite a long haul to bring a World Orchid Conference to a successful conclusion. Experience shows that the sustained commitment of what will probably be quite a small number of individuals, with appropriate interests and contacts, is the one of the most central requirements. Success cannot be achieved bureaucratically, by organizations alone.

3.2 Health and Safety

Organizers shall establish procedures for the observance of local health and safety regulations to ensure the safety of workers and visitors. It is recommended that a Health and Safety assessment is undertaken and that a Health and Safety Guide is produced and published and made available to all exhibitors and registrants before the event.

3.3 Insurance

It is very important to make clear where responsibility for insurance lies. This should be carefully included in all printed matter sent out to registrants. Arrangements for insurance for the registrants and exhibitors and for any losses by the organizers due to cancellation must also be carefully considered. The WOC Trust bears no responsibility for any kind of insurance or refunds under any circumstances whatsoever.

3.4 Planning and Publicizing the Conference

Organizers should not start the publicity for their Conference until the Conference immediately preceding, but they should plan a major drive since the registrants in attendance at this Conference are the most likely to want to attend the next one. They should have a well-manned and well-staged publicity booth, at which information can be given, and it is customary to arrange some sort of evening or early-evening hospitality event as well.

To get to that point, a great deal of work will need to be done, and not something that can happen at the last minute. Experience shows that once the bid has been successful and the Conference awarded to a prospective venue, it will take a sustained effort by the organizing committee and its members to be ready for their publicity debut at the following Conference.

While by this stage all the pivotal decisions must have been completed and all the critical arrangements put in place, many other matters remain still to be decided.

The most important tool for publicity and communication is probably the use of a unique **website**, linked to the WOC Trust website and others. But the printed word is also of vital importance for many.

While it might be assumed that word about an upcoming WOC would be universally known through websites, publicity in various orchid journals, or displays at different shows around the world, this is not always the case. It is important that each host keep an accurate database* of registrants with their e-mails and/or physical addresses. The final version should be sent to the President of the WOC Trust to be forwarded to the next organizing committee who then will be able to contact all those listed and invite them to attend their Conference. People that have attended a recent WOC are excellent candidates for future ones.**

******Because Data Protection regulations vary country to country, organizers should conform to the data protection legislation of their own country and should ask permission at the time of registration, usually in the form of a box to tick on the registration form.***

Much information can only be given in outline, and at this stage that is all that is required. But the general attractions of the host city and country as places to visit can be emphasized, because this is a key point in selling the Conference internationally. Posters should have been prepared and a "first circular" should be available either there on the spot or for mailing later. The opportunity should be taken to recruit a mailing list of such people, including e-mail addresses.

The final Conference brochure should be available for worldwide distribution about two years (and not less than 18 months) before the date of the Conference. The Trust would like to have a page in the brochure. The organizers should contact the President of the Trust with details of who should be contacted to submit the information. It

should contain detailed information that a prospective registrant or exhibitor will want to know about every aspect of the Conference, including accommodation, full social program, tours, all prices, and much else. (Organizers are encouraged to consult brochures from previous Conferences.) It should contain the registration form, reservation form for exhibitors, and vendors and full payment instructions. It is also important that on-line registration is available on the Conference web site as early as possible.

The publication of this brochure and the decisions that should go into its preparation mark the important first stage in the work of organizing the Conference. From this time, onwards, the plans for the Conference are set, and the work up to the Conference itself will be the work of completing the implementation of what the brochure promises.

Once the brochure is available, publicizing the Conference should accelerate. Individual mailings should be made to people on the mailing list. Journals should be approached with offers of articles and advertisements. Orchid organizations around the world should be asked to help. Publicity booths should be staged at important orchid events internationally, manned where possible by people from the host country. This is an area in which the Trustees of the WOC Trust can provide assistance.

Local publicity is a separate matter with an importance of its own, because paid attendance at the show plays a vital part in the success of every Conference.

The brochure does not need to contain the details of the lecture program, nor of the judging schedule. General indications and their timetable should be given. But the lecture program should already be well advanced by this stage, and its completion is a major item of work. It cannot be left to the last minute. Invitations to speakers should go out not less than one year ahead of the Conference and preferably 18 months. This is especially important in the case of orchid scientists, who usually need at least that length of time to arrange a leave of absence and funding.

It is important to continually update the website. Items such as the judging manual and the lecture program schedule with speakers indicated need to be online well before the conference takes place.

Some organizers have engaged conference/convention planning companies to assist in brochure preparation, other publicity and registration with limited success. **It should be emphasized that organizers should extensively review the credentials and record of such firms before taking such a decision.** This company is usually the only contact overseas visitors will have with the Conference planners prior to and during the event. If the company does not have a clear understanding of the operation and purpose of the Conference and sufficient, competent staff to handle all advance inquiries promptly and accurately, an additional burden of confusion and frustration will be thrust upon the volunteer committee. Some staff members should speak and write English, and adequate fax and e-mail facilities should be available to expedite communication. This company may also man the information and registration booths during the Conference, so service-oriented personnel, preferably English-speaking, should be available.

3.5 Finance and Budget

The financial responsibility for the Conference rests entirely with the host organizers. It is impossible to give general advice about how this responsibility is to be handled. Local circumstances, the pattern of local costs, and local resources vary widely. The 1984 Miami Conference was run on strictly commercial lines. Tokyo was effectively underwritten by a single large business enterprise. The main burden in Auckland had to be borne by the many local orchid societies. Glasgow relied heavily on the support of the local public authorities. Shah Alam was largely financed by the state and federal governments. There is no one pattern.

But there must be a budget, and there must be an organizing committee that is responsible for making the bid to host the Conference in the first place. The structure and the composition of that committee will, in addition to orchid interests, no doubt reflects the sources of the necessary financial backing. That same committee is, of course, responsible to the Trust for the international success of the Conference.

The Trust has very limited funds, but small loans may be provided to help local hosts with startup expenses. These are usually given on an interest-free basis, but Conference organizers who avail themselves of such loans are expected to repay the loan to the Trust after the completion of the Conference. This payment is separate from the Capitation fees described below.

Some general guidelines based on past experience can be given about what the main items of expenditure and income might be and about how the Conference budget might be constructed.

Registrants to the Conference are expected to pay their own way; they expect to do so. Looked at from their point of view, there are three main costs: transportation to and from the Conference (airfares mainly), accommodation during the Conference and Conference expenses. Many people coming from overseas will no doubt make a holiday out of it, but that is strictly their affair. However, it is the overall cost that matters to them. It is not the responsibility of the Conference organizers to bear the cost either of transportation or of accommodation, but they may be able to help with this by negotiating favorable rates with airlines or hotels. That would be very welcome to the prospective registrants, but it has nothing to do with the Conference budget itself.

Conference expenses are another matter. There is a well-established pattern that divides these into two. There are certain Conference expenses which are effectively independent of registrant choice: administrative costs, hire of facilities, publicity, printing, etc., and there are expenses in connection with the more peripheral activities and events (e.g., social events, tours) which from the registrant's point of view are optional extras. It has generally been the practice to cost these optional items separately and to set additional charges for them, so that each event is (more or less) self-financing. But here again local circumstances differ. There is no reason in principle why such events should not be priced in a way that will contribute to the overall Conference budget. This has been done at one recent Conference. It is a matter for the judgment of the organizers.

On the revenue side, there is, first, a **Conference Registration Fee**. It is usual to set this fee at a basic rate for early registrants and then to increase it by pre-announced steps as the date of the Conference approaches. The registration fee should be reasonable and affordable in order to attract the maximum number of full registrations and to make it an inclusive event. The registrant's fee allows: 1) entry at all times to lectures and to the show; 2) it provides a full set of Conference documentation; 3) it enables suitably qualified registrants to take part in the judging; 4) it entitles registrants to attend the opening reception and to buy tickets to attend other social events (e.g., such as dinners, banquets or the like) and to take part in tours.

Conference organizers are also required to provide, in their financial planning, a **Capitation Fee** based on full-time registrant numbers, and an appropriate percentage of "companion registrant" fees if less than "full registrant's," to be paid directly to the Trust as scheduled by the Trust. The capitation fee for full registrants at the 23rd Conference in 2020 will be thirty-five US dollars (\$35.00).

It may prove easier to get invited speakers to accept if some type of financial assistance is offered. Several Conferences have offered free registration.

Recent Conferences have introduced "day registration." This has been successful to allow people (especially local people) to join in for one or more days. If such registration is carefully priced, it has proved a useful innovation.

Registration fees alone will obviously not cover all the central Conference and show costs. Other sources of income include fees paid at the door by members of the public who visit the show, rental charges in the sales area, commercial sponsorship, donations and public subsidies. Exactly which mixture of these is right is a matter of judgment for the organizers in the light of local conditions.

3.6 Hospitality and Assistance to Registrants

For many registrants, attending the Conference will be their first visit to the host country and something of an adventure. Much of the success and subsequent reputation of the Conference depends on how welcome they are made to feel and on how easy and stress-free they find the arrangements during their stay in the country. This should be a prime concern of the organizers. A few tips follow.

- A Welcome Desk provided and manned at the local airport during appropriate arrival times.
- Registration should be smoothly administered and easy.
- An Assistance/Inquiry Desk should be provided in an accessible place throughout the Conference, manned at all reasonable hours. If the lectures and the show are in separate locations, it is helpful to have such an information point in each. There should be somewhere that registrants can go to for help with information about tours and other extra-Conference activities.

Registrants expect to be provided at registration with a case or bag containing all necessary (and some additional) documentation. Since this is taken home by most registrants as a souvenir of the Conference, it should be appropriately designed. Other suitable souvenirs are welcome. Depending on the physical layout of the whole Conference, some leisure seating space private to registrants should if possible be provided at either the site of the lecture program or at the show or at both. Simple refreshments (e.g., coffee, cookies) are appreciated even if a charge is made. It is very desirable that restaurant facilities, preferably of various grades, be accessible from these locations.

Transport arrangements for registrants are extremely important and have sometimes been the cause of dissatisfaction and controversy. If the show and the lecture program are held in separate locations, regular and convenient transportation between them should be provided. Whether private Conference transportation from main hotels to conference sites is provided will depend on what other arrangements are readily available locally but, particularly if there is any reason for registrants to fear for their personal security (perhaps in a country where the language is unfamiliar), such private transportation should be provided. The same considerations make the provision of transportation to and from the main social events (which may well be held at night) a necessity in most cases.

Whether and on what basis any charge is made for such Conference transportation is a matter for the organizers and will no doubt be decided within the general budget framework. It is customary for the cost of transportation connected with main social events to be covered by the fee levied for such events. Whether any charge is made for other Conference transportation is less important to registrants than that it should be available where it is believed to be needed and that the transportation arrangements themselves should be both well-publicized in advance and easy and convenient to use.

3.7 Hotels

A good range of choice of hotel and other accommodation should be offered. For many the cost of attending the Conference will be a challenge and involve considerable personal sacrifice.

It is the policy of the Trust to encourage genuinely worldwide participation in the Conference as far as possible and to avoid it being seen as a "rich man's event." The accommodation offered to prospective registrants should therefore include five-star hotels as well as low-cost accommodation as bed and breakfast rooms and student halls of residence (where suitable ones are locally available) and a range of options in between.

4. Site Selection Procedures

Final responsibility for the series of World Orchid Conferences and for the choice of venue rests with the WOC Trust. Prospective hosts should observe the following Trust procedures and requirements.

4.1 Site Selection Committee: Composition and Meeting Time

Decisions on the location of future Conferences are taken up by the Trust after receiving detailed proposals from prospective hosts.

The Trust will invite experienced representatives from orchid organizations throughout the world to join them in forming a Site Selection Committee to consider proposals. We anticipate that the next Site Selection Committee will meet in Guayaquil in 2017, to consider invitations to host the 23rd WOC and to make recommendations to the Trustees.

If more than five applications are received, the Trust reserves the right to shortlist the strongest candidates for submission to the Site Selection Committee.

In deciding among the applications to host the Conference, the Trust will be guided by four main considerations:

- (1) The quality of the financial and administrative backing behind each proposal as well as the necessity of local orchid community involvement.
- (2) The facilities available at the proposed location.
- (3) Experience in producing large orchid shows and organizing Conferences.
- (4) A desire to see the Conference move around among the continents.

4.2 Bid Presentations

Prospective hosts are required to make a formal presentation to the Trust and the Site Selection Committee to provide detailed information about all aspects of the Conference:

- (1) The organization and backing behind the invitation
- (2) Financial arrangements
- (3) Conference, hotel, and exhibition facilities
- (4) Customs, CITES, and plant health arrangements

Applicants are also likely to be questioned about travel facilities, social or cultural events, local tours, *etc.* While the heart of the Conference is the lecture program and the show, it is also a major international event around which many people build holidays.

All members of the team who will be involved with the formal presentation must be full registrants of the WOC where the presentation will be held, and such registration must be completed at least 30 days prior to the start of the WOC.

Organizations considering issuing an invitation to hold the Conference should contact the President of the Trust as early as possible to consult about their plans. Prospective applicants are strongly advised to invite the President of the Trust, perhaps with other Trustees, to visit the proposed location for consultation and to review facilities and meet the applicants. Ideally this visit should coincide with a show or another major event organized by the applicant. Following this visit the President/Trustees will give feed-back to the applicant and report to the Trustees and Site Selection Committee. This visit should take place well before any relevant Site Selection Committee meeting.

4.3 Sponsors

There has been a tendency recently for applications to be originated and promoted by Tourist Boards, Conference Centers, and similar bodies. While the support of such bodies is to be welcomed and will, in many cases be invaluable, the Trust expects invitations to hold the Conference to come from orchid interests in the country and will always require solid evidence that an invitation has the enthusiastic and effective backing of orchid organizations: scientific, amateur and commercial. At least two orchid interest individuals must be part of the formal presenting team. It is expected that one of them will be the Chair of the Organizing Committee for the WOC and that person must have the time to be intimately involved with the planning process throughout the six-year lead time until the WOC.

4.4 Supervision by WOC Trust and Progress Reports

The Trust will normally announce the selection of the prospective host at the closing ceremony of the World Orchid Conference where the bids were presented. **The successful bidder must understand that this selection is only "prospective" and will not become final until the World Orchid Conference immediately preceding theirs.**

Successful applicants are required to keep in regular touch with the President of the Trust or another appointed Trustee and must submit written reports at least annually or more often, if requested, on the progress of the Conference planning. The reports should show, in increasing detail as time advances, what is planned and what has been achieved in every aspect of the Conference: financial and administrative arrangements, the Conference program, the show, social events, tours, and CITES and customs arrangements.

Final Confirmation of the venue will be given at the Conference *immediately preceding* the proposed Conference. Confirmation will reflect the quality of the reports submitted in the intervening period. The prospective host will be required to make a further formal presentation to the Trust at this Conference. They are strongly advised to invite the President of the Trust, possibly with another Trustee, to visit them again in the six-month period before this formal presentation. In extraordinary circumstances, confirmation may be granted earlier if sufficient progress can be demonstrated to the Trustees by the organizers.

4.5 Financial Responsibilities

Financial responsibility for the conference rests with the local hosts. The Trust has very limited funds, but small loans may be provided to help local hosts with start-up expenses. These are usually given on an interest-free basis, but Conference organizers who avail themselves of such loans are expected to repay the loan to the Trust after the completion of the Conference. This payment is separate from the capitation fees described elsewhere in this document. Conference organizers are also required to provide, in their financial planning, for a capitation fee based on full-time registrant numbers, and an appropriate percentage of "companion registrant" fees if less than "full registrant's", to be paid directly to the Trust in accordance with a payment schedule provided by the Trust. The fee for each full registrant at the 23rd Conference in 2020 will be thirty-five US dollars (\$35.00).

All expenses for visits made by WOC Trustees to proposed or selected sites are to be borne by the local organizers.

The Trustees stand ready to provide assistance and advice on all aspects of a Conference. Their experience has proved a valuable resource for local Conference organizers in the past, especially in the more technical aspects of the Conference—for example, the lecture program and the judging schedule. The Trustees are also well placed to help with the job of publicizing the Conference among the relevant international public.

5. Application Form and Site Selection Meeting

Meeting the Site Selection Committee during the 22nd WOC in Guayaquil, Ecuador:

The Trustees want to ensure that bids do not become commercialized, or expensive, and there should be no gifts to Trustees or Committee members except materials tied directly to a bid or expenses in regard to site visits by an individual or group.

The formal meeting of the Trustees and Site Selection Committee appointed by the Trustees of the World Orchid Conference Trust will be held during the 22nd WOC in Guayaquil, Ecuador. The date and time of your presentation will be arranged with you nearer the time of the Conference.

You can expect to be questioned on any of the details you have given in the application.

Other topics for discussion are likely to include the following:

- Do you intend to have a large show before 2023? It could be a trial-run. Give details.
- Will you set up a website for the WOC?
- Publicity, in your country and overseas, is very important and expensive. Discuss marketing plan.
- Plans for social events/tours/day trips before, during, and after the Conference.
- Plant Health and CITES regulations, certification and inspections must be arranged. What plans and arrangements have you made?
- Plans for security arrangements; health and safety regulations; insurance.

APPLICATION FORM

24th WORLD ORCHID CONFERENCE 2023

It is extremely important that a copy of the current "Guidelines for Prospective Hosts and Organizers," available on the website www.woctrust.org, is carefully studied prior to completing this form.

Please return the completed form and any relevant documentation to the President, WOC Trust, Ms. Sandra Tillisch Svoboda by e-mail at stillisch@cox.net or by mail at 231 Middle Rd., Santa Barbara, CA 93108-2449, USA no later than 15 September, 2017

Name of Country:

Name of City:

Name of Hosting:

Organization(s) Address:

E-mail:

Telephone:

Fax:

Names of Supporting Organizations (if any):

PERSONNEL:

Name of Chairman (main contact):

Address:

E-mail:

Telephone:

Fax:

Names of supporting persons who will be closely involved: (e.g.)

Deputy Chairman:

Treasurer:

Chairman Lectures:

Chairman Show:

Publicity Manager:

Other supporting Committee members:

VENUE:

Name and location of Conference/Exhibition Center:

Will the lectures and Show be at the same location?

HOTELS:

Will there be a designated Conference Hotel?

Other Hotels: please provide details of sizes and price ranges:

FINANCE:

Reserves available for Preliminary Expenses:

Proposals for Sponsorship/Underwriting:

Proposed Registration Fee:

EXPERIENCE in organizing large Orchid Shows and/or Conferences:

Give details of recent (last three years) experience of your organization and proposed committee members: