

Policy on holding international meetings in the UK

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This paper sets out the Society's policy on inviting International Unions and other scientific members of the ICSU family to hold international Congresses, Assemblies and similar meetings [hereafter 'Meeting'] in the UK. It was adopted by the Council of the Royal Society in April 1999.

The paper sets out the general principles of the Society's policy, shows their application to the consecutive steps involved in preparing a bid to host a Meeting, provides examples of how they might work in different circumstances and provides examples of standard agreements to cover particular elements of the process.

I General principles

- 1 The objective of this policy is to allow the Society (i) to invite ICSU bodies to hold Congresses, Assemblies or similar international meetings in the UK, and (ii) to help the meeting organisers financially and in other ways, without (iii) exposing the Society to unknown or unlimited liability. The policy also applies, *mutatis mutandis*, to meetings of international bodies outside the ICSU family.
- 2 The policy focuses on the three parties involved in an international meeting of this sort and on the relations between them. The parties are:
 - a) the ICSU body (eg Union, Associate, Scientific Committee or other member of the ICSU family), which may or may not have statutes addressing in greater or lesser detail the conduct of, and responsibility for, Meetings;
 - b) the UK adhering body. If that is not the Royal Society, then no major questions (other than those normally associated with offering grants) will arise for the Society since it will have no formal relation with the Union: only the formal adhering body is able to issue an invitation;
 - c) the organising body, which must be identified before the invitation is issued, must be technically competent to run the Meeting, and must be likely still to be in existence when the Meeting occurs and the extent of any liability becomes apparent (which may be 10 or more years after the invitation is issued).
- 3 It is central to this policy that there is only one organising body. Responsibility for selecting, or establishing, the organising body rests with the sector of the UK scientific community that requests the Society to issue the invitation. The organising body may choose to subcontract various aspects of the Meeting (eg the scientific programme or the day-to-day administration), and enter into agreements (such as leases) with other parties, but the Society as adhering body and issuer of the invitation will have a relation only with the organising body, not with any subcontractors.

- 4 The Society will issue an invitation only if it is the adhering body and (i) all three parties described in paragraph 2 exist, (ii) each has an appropriate (as determined by this document), mutually acceptable, relationship with the other two, if necessary overriding any statute of the ICSU body specifying a different approach to the meeting, and (iii) the Society is satisfied that it will not incur any unacceptable liability by issuing such an invitation.
- 5 In terms of the relation between the Society and the other two parties, the following steps must be explicitly taken before the Society issues its invitation.
 - a) The organising body must accept, in writing, full responsibility for ensuring that the Meeting takes place. It must, in effect, have a contract with the ICSU body to deliver the Meeting, so that if for *any* reason the Meeting does not materialise that is a matter for the organising body and the ICSU body, and neither the ICSU body nor the organising body will have a claim on the Society. It must be made clear to all concerned that the organising body is *not* acting as an agent of the Society.
 - b) The organising body and the ICSU body must agree between them to accept full responsibility for the finance of the Meeting and for any other costs or liabilities that may arise in connection with the Meeting (notwithstanding any grant that the Society may offer). In practice, that may mean the organising body taking full responsibility if the statutes of the ICSU body so require. The organising body may arrange for other organisations (eg a host university, civic authority, charity or development agency) to share responsibility, but, as far as the Society as adhering body is concerned, only the organising body and/or ICSU body will be responsible.
 - c) The ICSU body must confirm that, in respect of the Meeting, any explicit or implicit responsibility falling on the Society as adhering body has been negated, and either absorbed by the ICSU body itself or reassigned to the organising body.
- 6 The conditions in paragraphs 2–5 must be met before the Society can issue an invitation. If these conditions are not met, then an invitation cannot be issued.

II Operating procedures

- 7 Except for meetings of ICSU itself (where the Society itself would be the organising body), the Society will not initiate an invitation. The initiative must come from the relevant sector of the UK scientific community, wanting the benefits of hosting a Meeting and willing to put in the effort necessary to secure those benefits.
- 8 The first step, therefore, is for the initiator(s) to approach the Society. They will then be given a copy of this paper so that they understand clearly the division of work and of responsibility between the various parties. They may also be given, on request, documents summarising previous organisers' experience in the running of Meetings. Such documents must include a suitable disclaimer (see annex A1).

- 9 Early communication with the Society is encouraged - preferably twelve months before the Meeting at which it is intended to submit the invitation and well before any signals are sent to the ICSU body as to the likelihood of an invitation from the UK - so that initiators have a clear understanding of the Society's policy and the responsibilities that will fall to them. The formal approach to the Society should be not less than six months before the Meeting, so that the Council of the Society can give it full consideration.
- 10 The main task for the initiators at this stage, from the Society's point of view, is to identify an organising body that complies with the conditions of paragraphs 2(c) and, in principle, with 5(a) and (b) above. Where there is, for example, an established learned society in the relevant field, this is likely to become a matter of exploring its willingness to accept liability as described and its ability to meet any such liability. Where there is no obvious body, or where the learned society is not willing to accept liability, then the initiators will need to find other ways of addressing this issue (see paragraphs 17-19). Under no circumstances will the Society itself undertake to be the organising body, or to retain any of the responsibilities of the organising body, for a meeting of an ICSU body other than ICSU itself. If no suitable organising body can be found, no invitation can be issued. No contracts should be entered into, responsibility taken or liability incurred by the initiators at this stage.
- 11 Success in this task means identifying an organising body that the Society agrees complies with paragraph 2(c), and receipt by the Society of a letter from the designated organising body providing assurances about 2(c) and accepting in principle the requirements of paragraphs 5(a) and (b) (see sample letter at annex A2).
- 12 At this point, which may typically be two Meetings ahead of the one to be invited to the UK, the Society may, with the approval of Council, make an informal approach to the ICSU body inviting it to the UK. This is necessary so that the UK bid may be considered alongside bids from other countries.
- 13 The next step is for the organising body, in conjunction with the Society, to negotiate with the ICSU body to secure its acceptance of all the conditions specified in paragraph 5. Success in this task means:
 - a) that the Society receives a copy of a binding agreement (see sample at annex A3) between the organising body and the ICSU body (to come into effect once the invitation has been formally accepted by the ICSU body) that
 - makes the organising body directly and wholly responsible to the ICSU body for delivering the Meeting and for all matters related to the proper conduct of the Meeting;
 - states that full liability for all matters concerning the financial affairs of the Meeting will rest with the organising body and the Union, and that specifies how this liability will be divided between them;
 - specifies that the organising body is not acting as an agent of the Society.
 - a) that the Society receives a letter from the ICSU body (see sample at annex A4) agreeing to negate any explicit or implicit responsibility falling on the Society as adhering body in respect of the Meeting.

- 14 When these conditions have been met, the Society will issue a formal invitation (see sample at annex A5), to be considered by the ICSU body in accordance with its normal procedures (e.g. at the Meeting preceding the one being invited to the UK).
- 15 When the invitation has been accepted by the ICSU body, the organising body may apply to the Society for a grant. The application should include a draft budget on the form provided by the Society(annex 7), detailing clearly anticipated expenditure and income. The application will be considered in accordance with the Society's normal procedures and in the light of the resources available to the Society. No grant awarded shall be taken, by the organising body or by any other party, to imply that the Society accepts any liability for the process or outcome of the Meeting. The grant shall have attached to it such conditions on use and reporting as Council shall determine at the time (see annex A6).
- 16 The Society will not seek to be involved in the preparations for the Meeting, will not be represented on any organising committee and will not receive papers. The organising body must, however, inform the Society of any circumstance likely to jeopardise the Society's relationship (as adhering body) with the Union or the successful holding of the Meeting.

III Examples of organising bodies (for illustrative purposes only)

17 *RS is not adhering body*

There are a number of ICSU bodies to which the UK adheres through an organisation other than the Royal Society. These include bodies falling outwith the Society's range of disciplinary interests, and bodies for which a particular specialist learned society is better suited to effecting the work of adherence. In these cases, the designation of the organising body for a Meeting will be a matter for the adhering body and not for the Society. The Society may, however, offer a grant to any designated organising body, under such terms and conditions as apply at that time.

18 *RS is adhering body (i)*

The Society is the UK adhering body to ICSU bodies in the natural sciences when, and only when, there is no suitably constituted and resourced specialist body in the UK able to take on this task. This situation occurs with, for example, IUTAM, IUGG and URSI.

The scientific communities represented by these ICSU bodies should be able to host Meetings of their international bodies as readily as any other scientific communities. How this might best be done will depend on the circumstances of each case. For example, in the UK the interests of one of these ICSU bodies might fall across the interests of three specialist learned societies in such a way that that no one of them can properly take on the role of UK adhering body. The Society therefore is the UK adhering body to the ICSU body but, as indicated above, would not be willing itself to organise a Meeting of the ICSU body in the UK. If the relevant UK scientific community wanted to invite the ICSU body to the UK, its options would, in principle, include:

- a) inviting the three specialist learned societies to set up a jointly owned company, underwritten by them in the event of any default, to act as organising body for the Meeting in a way that would meet the requirements of this policy; organisers are advised to seek legal advice on company law if this option is favoured;
- b) inviting any one of the three specialist learned societies to act as organising body in return for an agreement by the others to share liability. Under both this and the previous option the specialist learned societies could seek to share financial liability with, for example, a host institution, an industrial or commercial supporter or the ICSU body itself;
- c) setting up an organising body of whatever complexion it can, willing to be responsible to the Society for organising the Meeting, and then inviting the Council of the Royal Society, exceptionally, to retain its link as the body ultimately responsible to the ICSU body for the Meeting. Such an organising body would need to agree, in writing, to take full financial responsibility for the Meeting under all circumstances, in the same way as any other organising body. It would also need to convince Council that it would be in a position to discharge its financial and other responsibilities at the time the Meeting was to be held.

19 *RS is adhering body (ii)*

The only situation (other, exceptionally, than that described in paragraph 18 (c) above) in which the Royal Society is the adhering body and would agree also to retain its responsibility to the ICSU body for a Meeting is in respect of a General Assembly of ICSU itself. Since an ICSU General Assembly would be of concern to all scientific disciplines, it would be appropriate for the Society to take this role. The Society would then lead the organising body and would take full and direct responsibility for the conduct, management and finance of the Assembly.

ANNEX: Examples of written agreements

This annex gives examples of the sort of wording that might be used in the various situations described in the main text. It is intended for illustrative purposes only and is not prescriptive. Detailed wording will need to be adjusted to the particular circumstances of each case.

A1 Disclaimer for 'guidelines' or 'statements of good practice' on how to organise a Meeting

This document is written in good faith to make available to organisers of international Meetings the experience of previous organisers, is given for information only based on past experience, and is not to be construed as firm advice or rules for holding a Meeting. The Royal Society cannot be held responsible for any consequences arising from use of this document.

A2 Formal letter from the Chairman of the organising body to Royal Society providing assurances about its constitution and competences and requesting the Society to submit an invitation

We [putative organising body] should like to request the Royal Society as UK adhering body to [ICSU body] to invite [ICSU body] to hold its [year] Meeting in the UK. We should like to be able to present the invitation formally at the forthcoming [date] Meeting in [location].

If the invitation is successful, we will constitute ourselves as the organising body, with a formal legal personality or structure able to assume all necessary legal obligations. [We are a well established learned society, operative since (year) and in sound financial shape to take on this activity.] [As there is not a single learned society responsible for this discipline, (named societies) have agreed jointly to establish an organising body as follows.....]

We have extensive experience in organising large international meetings[give details]. For this particular Meeting, we plan to [engage a professional conference organiser to handle.....aspects] [do all the work ourselves using an experienced in-house group] [use some other (specified) approach].

We have read your *Policy on Holding International Meetings in the UK* and agree to accept in full the organisational and financial responsibilities falling on the organising body as set out in that document. We have had discussions with [the ICSU body], which has agreed in principle to accept us as the organising body and [notwithstanding previous custom and practice] to exempt the Society from its responsibilities as UK adhering body in respect of the Meeting. We enclose an agreement [see A3] confirming this.

A3 Agreement between organising body and ICSU body about respective responsibilities and financial liabilities

It is AGREED that, in the event that the Royal Society as UK adhering body issues an invitation to hold the [year] Meeting in the UK and the invitation is accepted at the [forthcoming] Meeting:

- 1 The ICSU body agrees that, in respect of the Meeting, and notwithstanding any provision contained in its constitution, any explicit or implicit responsibility falling on the Royal Society as adhering body has been negated, and the ICSU body will sign an Agreement with the Society to that effect.
- 2 The organising body and the ICSU body agree that full liability for all matters concerning the financial affairs of the Meeting will be shared between them as follows.....
- 3 The organising body and the ICSU body agree that the organising body is directly and wholly responsible to the ICSU body for delivering the Meeting and for all matters related to the proper conduct of the Meeting, and that the organising body is not acting as an agent of the Royal Society.
- 4 This agreement will come into force once the invitation has been formally accepted by the ICSU body.

A4 Letter from ICSU body to Royal Society negating the Society's responsibilities as adhering body in respect of hosting a Meeting

In the event that the Royal Society as UK adhering body issues an invitation to hold the [year] Meeting in the UK and the invitation is accepted at the [forthcoming] Meeting:

- 1 We agree that, in respect of the Meeting, any explicit or implicit responsibility falling on the Society as adhering body is negated.
- 2 We will sign [have signed] an agreement with the organising body (to come into effect once the invitation has been formally accepted), and provide[d] a copy to the Society, that
 - (i) states that full liability for all matters concerning the financial affairs of the Meeting will be shared between us and the organising body as follows.....
 - (ii) makes the organising body directly and wholly responsible to us for delivering the Meeting and for all matters related to the proper conduct of the Meeting, and specifies that the organising body is not acting as an agent of the Society.
- 3 When the above conditions have been met the Society will issue a formal invitation to be considered by us in accordance with our normal procedures.

A5 Formal invitation from the Royal Society to the ICSU body

It is my pleasure to invite [the ICSU body] to hold its [Meeting] in the UK in [year]. This invitation is issued at the request of [the organising body] on the understanding that, should it be accepted, the Agreements already in place between you and the Royal Society [A4 above], and you and the organising body [A3], will come into force. Notwithstanding previous custom and practice and any provision in the constitution of [the ICSU body], this invitation is being issued subject to the condition that the Society will not have any responsibility for or liability arising from the [Meeting].

I hope that the UK is successful in its bid and look forward to hearing from you in due course.

A6 Letter from the Royal Society to the organising body offering a grant or loan and specifying, *inter alia*, the form of any public reference to financial support from the Society

I am pleased to inform you that the Council of the Society has agreed that, subject to availability of funds, a (grant) of [£x] be awarded towards the costs of running the [Meeting]. This will be paid from the budget for [year].

The award of this grant does not imply that the Society is in any way responsible for the organisation or the finances of the [Meeting]. Should the holding of the [Meeting], be in jeopardy the Society expects to be informed; but otherwise we do not require to be kept informed of progress with the planning of the [Meeting]. We do, however, need to receive a copy of the final audited accounts of the [Meeting] showing the use to which the [grant] has been put.

Should you wish to refer to this financial support in any of the literature for the meeting, please use the following wording.

The Royal Society has provided a [grant] to assist with this [Meeting].

International meetings in the UK

Application for grant

Applicants should complete the form below and return it to Ruth Cooper in the Science Advice Section.

Name of ICSU body

Name of organising body

Contact details at organising body

Title of meeting

Date(s)

Venue

Estimated maximum attendance

Attendance at and venue of previous meeting

Draft budget

Please state estimated direct costs (£)

1 Printing/stationery/advertising

2 Postage

3 Room hire and equipment

4 Catering

5 Salaries of temporary staff

6 Invited speakers' expenses

7 Organisers' expenses

8 Insurance

9 Other – *please detail on separate sheet if necessary*

10 Total anticipated expenditure

Estimated income (£)

11 Registration income

12 Other sources of funding – *please detail on attached sheet*

13 Total expected income

Funding request from Royal Society (£)

14 Amount requested as grant and financial year required

Date

Signature of contact at organising body

March 1999

Charity No. 207043