

Explanatory Document

1. General criteria

1.1 The dates determined for a seminar shall be based upon the general multi-annual programme adopted during the RR/SRR annual meeting, and should take account of religious events, national holidays, elections and any other relevant dates. *Related to step 1.*

1.2 All invitation letters for a workshop/seminar organised on the initiative of the OIE Headquarters (HQ) or OIE Regional or Sub-Regional Representations (RR/SRRs) must be signed by the Director General of the OIE. *Related to steps 1, 5 of the Note de Service n.2012/3.*

1.3 The Focal Points trainings are mainly addressed to the National Focal Points, or their representatives designated by the OIE delegates. Nevertheless, when relevant, also other categories of participants are allowed to attend (observers from the host country, representatives of regional organisations, Reference Centres, representatives of donors, etc.). *Related to steps 3, 7, 9, 10.*

1.4 In the case of a seminar financed or co-financed by a donor, when relevant, the World Fund Coordination Unit (WF) will provide the RR/SRR involved and the Regional Activities Department (RAD) with guidelines to be followed in order to comply with the terms of the agreement established with the donor (e.g. visibility of the donor, invitation of a representative of the donor, eligibility criteria). *Related to step 1.*

1.5 When proposing a host country for an OIE seminar/workshop, the RR/SRR must try to obtain its in-kind contribution to the event (accommodation, coffee break, translation, reception, travel, etc.).

1.6 Reference documents:

a) Note de Service No. 2010-14: Financial rules and guidelines for the organisation of OIE Regional workshops and seminars by Regional and Sub-Regional Representations

b) Note de Service No. 2010-22: Distribution of OIE Members per Region, for different purposes¹

c) Note de Service No. 2010-7: Mission reports by staff of the Regional and Sub Regional Representations and experts representing the OIE at meetings

1.7 In the case of a seminar organised jointly by two or more RR/SRRs, **RR/SRR** involved should define and communicate in advance to the RAD their respective involvement (venue, logistics, etc.). *Related to step 1.*

1.8 The **RR/SRR** should inform the RAD of the name of the person in charge of organising the event at the RR/SRR level. Should this person become unavailable for any reason (e.g. holidays), the RAD must be informed of the name of the person who will be taking over responsibility for the organisation. *Related to step 1.*

¹ Should the RR/SRR wish to make any changes to the list of countries for a particular event, the proposed changes must be submitted to RAD for the Director General's approval.

1.9 The **RR/SRR** involved should obtain a written commitment from the host country regarding the facilitation of visa issuance, where necessary.

1.10 In the case of an event being cancelled or postponed, once obtained the confirmation, the **RAD** must inform the **RR/SRR**, the OIE Headquarters department/Unit responsible for the Focal Points topic (FPRD) and the Administration, Logistics and Publications Department (ALPD). The **ALPD** will undertake all necessary steps in order to be refunded of at least a part of the amount paid for flight tickets.

1.11 The **FPRD** must provide the **RAD** with the official list of Focal Points and the name of the person in the department who is in charge of maintaining the Focal Points list updated by receiving notification of newly appointed Focal Points. FPRD must use all these data to update TIGER. *Related to step 3.*

2. Budget

2.1 The **RR/SRR** should provide the Deputy Director General (**DDG**) with a copy to the **WF, RAD, FPRD, ALPD**, with the **draft budget** proposal for the organisation of the event in the appropriate template, as defined in the **Annex II of Note de Service No. 2010-14**. The budget proposal must be sent in advance in order to have the approved document available when starting the preparation of invitation letters. In the case of seminars/workshops requiring specific technical equipment to carry out the training (e.g. WAHIS or WAHIS-*Wild*), the **RR/SRR** must ensure its availability *in loco* and include, if necessary, its cost in the budget. *Related to step 1.*

2.2 The **DDG** with the support of Financial and Budget Unit (**FBU**) should review the budget in coordination with the **WF** and should communicate its approval to the **RR/SRR** with a copy to the **RAD, FPRD** and **ALPD**. *Related to step 2.*

2.3 The **RR/SRR** sends to the **DDG** the final budget (see also paragraph n.8). *Related to step 17.*

3. Programme

3.1 The **FPRD** should draft a preliminary programme by contacting the potential speakers/organisations. The preliminary programme should be provided to the **RR/SRR** in order to be updated, if necessary, with regional inputs and specific issues. *Related to step 1.*

3.2 The **FPRD** should inform the **RR/SRR** on the necessity to make available, during the meeting, working documents/PowerPoint presentations translated in the languages of the seminar. **FPRD** shall provide **RR/SRR** with the material to be translated in due advance. *Related to steps 1, 8.*

3.3 The **RR/SRR** should provide the **DDG** with a copy to the **WF, RAD, FPRD, ALPD**, with the provisional **draft programme** of the seminar (in Word format), updated with regional inputs and specific issues, including the tentative names of the speakers. For programme templates, please see http://web.oie.int/extranet/fr/seminaires_del_pf.php. *Related to step 1.*

3.4 The **FPRD** should review the programme provided by the **RR/SRR** and communicate its approval to the **RR/SRR** with a copy to the **RAD**. N.B.I: If the names of speakers are not confirmed yet, the **FPRD** shall endorse a version of the programme containing at least the names of institutions/organisations to which speakers belong to. This approved version will be sent with invitation letters. N.B.II: The **RAD** must be kept informed of any subsequent changes to the programme. *Related to step 3.*

3.5 The **RR/SRR** should provide the **RAD** (with a copy to the **FPRD**) the **approved draft programme** in all the languages of the meeting, ensuring, where appropriate, the visibility requirements of the donor(s) on the document. *Related to step 3.*

4. Concept Note

4.1 The **RR/SRR** should provide the **DDG** with a copy to the **WF, RAD, FPRD, ALPD**, with a **concept note – to be used for internal purposes only** – to clarify the background and objectives of the event as well as any important aspects of the organisation: rationale, list of the invited countries², tentative speakers, number of attendees for each country, authorities, observers, OIE staff³, funding, collaboration between RRs, languages/interpretation, etc. This note must also provide details of all the planned travel and accommodation arrangements (e.g. who will be in charge of purchasing flight tickets, who will need tickets⁴, hotel reservations, airport transfer, visa assistance, etc.). A model concept note is provided at *Annex II*. *Related to step 1.*

4.2 The **ALPD** should take note of the details provided in the concept note in order to be informed of the upcoming event and, if foreseen, of the upcoming request for the support of ALPD through **oietravel** and/or the creation of a webpage for registration on line. *Related to step 1, 4, 6, 7, 8, 9, 10.*

4.3 If not previously included in the concept note mentioned in paragraph 4.1, the **RR/SRR** should send the **RAD** (in Word format, and with a copy to the **FPRD**) the complete **list of expected participants** – speakers, attendees, authorities, observers, OIE staff, etc. – with their full contact details. The participants should be listed by category (e.g. speakers, facilitators, chairperson, observers, participating countries, OIE staff), irrespective of whether or not their expenses are to be covered by the OIE. The name, position, institution, country and email address of all people to whom invitation letters are to be sent should be indicated. (for the template, please see *Annex III*). *Related to steps 4, 6.*

5. Information sheet

5.1 The **RR/SRR** must provide the host country with the list of countries/experts expected to participate in the workshop/seminar. The **RR/SRR** must ask the **host country** for updated information on visa requirements and the contact details of its embassy/consulate in each country to be invited (or, if none exists, the nearest embassy/consulate). The **RR/SRR** will update the information sheet with this information. *Related to step 1.*

5.2 The **RR/SRR** should send the **RAD** (with a copy to the **FPRD** and in Word format) a practical **information sheet** for the participants. This document should be provided in all the languages of the meeting and where appropriate, should reflect the visibility requirements of the donor(s). *Related to step 1, 4, 5, 6.*

The information sheet should include at least the following information (please see *Annex IV*):

² The **RR/SRR** must verify whether the invitees from the Host Country (Delegate, Focal Point) reside in the same area as the venue for the event; if they do not, the cost of their participation must be provided for in the budget.

³ The participation of the **RR/SRR** Administrative staff shall be limited to specific organizational needs.

⁴ In the case of OIE staff from **RR/SRRs** or experts/consultants, it is important to check whether **oietravel** or local offices/travel agencies will be responsible for making their travel arrangements.

a) Accommodation and catering: details of the hotel, including a map; details about booking; details of other expenses covered / not covered by the OIE; details about the use of per diem allowances, etc.

b) Detailed list of expenses covered for OIE-funded participants.

c) Visa and transit visa details: information on expenses covered / not covered; how to apply, and responsibilities. N.B.: Even if the information sheet is not yet available, the information on visas/transit visas and the list of embassies must still be provided at this stage.

d) Details of the meeting venue, including a map.

e) If foreseen, details of transfer arrangements from/to the airport. If not foreseen, the information sheet must include instructions on how to reach the hotel/ event venue (and if possible the cost of transport).

f) Contact details of the local organising committee.

5.3 The **RR/SRR** must send all participants and speakers a reminder with information on obtaining a visa, transfer arrangements (if foreseen) or available means of transport to the hotel/venue, contacts to call in case of need, and details of what expenses are or are not covered. *Related to steps 12, 14.*

6. Invitation letters

6.1 The **RR/SRR** should send the **RAD** (with a copy to the **FPRD** and in Word format) one **model letter** for each category of participants. *Related to step 1.*

a) The model letters should be provided in all the languages of the meeting. Since it is not feasible to include the logos of donors on invitation letters, the text should ensure their visibility (e.g. “This workshop is co-funded by the European Union through the “Regional Cooperation Programme on Highly Pathogenic and Emerging and Re-emerging Diseases (HPED)”); see also paragraph 1.4 above and Note de Service No. 2010-14.

b) Since the text of each model letter will be different accordingly to the kind of its addressee, each model shall be identified with letters or numbers (e.g. model “A”: Countries with Focal Points; model “B”: Countries without Focal Points). **RR/SRR** must assign each model letter to a specific category of the list of participants and provide RAD with clear instructions (e.g.: the names of all addressees of the invitation “A” listed at the top of the model letter “A”; or specify the model letter to be used near each category of contributors mentioned in the list of participants, (see paragraph 4.3).

c) The invitation letters should clarify who is responsible for providing life/medical insurance cover. The OIE only covers insurance for speakers, members of the OIE Regional Commission bureaux, OIE staff, if any, but in these cases it is not necessary to indicate it in the invitation letter.

d) The invitation letter should also emphasise that it is the responsibility of the participant to obtain any necessary visas and transit visas for the full round trip.

e) The invitation letters should clearly state who is in charge of purchasing flight tickets, booking hotel accommodation, etc. and their respective contact details (in accordance with the concept note).

When a per diem is provided to invitees, the invitation letters should specify if it is full or ad hoc (for the establishment of the per diem amount, see Note de Service No. 2010-14).

f) The purpose of the templates – each of which should be adapted by the RR/SRR to include details of the particular event – is to provide standard models that are easy to draft and review, thereby saving time throughout the different steps of the approval procedure. The templates are provided in Annex V.

- i. model letter for the Delegate of the Host Country;
- ii. model letter for the Delegates of countries with a Focal Point;
- iii. model letter for the Delegates of countries without a Focal Point;
- iv. model letter for other participants whether or not sponsored by the OIE;
- v. model letter for OIE staff (specifying if they will be a speaker/facilitator).

6.2 The **RAD** reviews the model letters and submits them to the DG for approval. Once the model letters have been approved and the individual letters have been signed by the DG, the **RAD** sends them electronically to the addresses with copy to relevant persons of HQ and RR/SRR. Invitation letters can only be signed when the budget has been approved (or is about to be approved). *Related to steps 4, 5, 6.*

6.3 The **RAD** gives also the approved model letters to the **FPRD** as a reference model to prepare and send the invitation letters to **speakers**. *Related to steps 4, 5, 6.* N.B.I: If at this stage the names of speakers are not confirmed yet, the **FPRD** can address the letter to the institution/senior officer to which tentative speakers belong to.

N.B II.: When a letter for a speaker is addressed to an OIE Delegate (e.g. an OIE Delegate who is a speaker or is being asked to nominate someone to give a presentation), the letter will be prepared by the **RAD** in coordination with the **FPRD**.

6.4 The **FPRD** must send the **RAD** and RR/SRR a copy of all invitations sent to speakers. *Related to step 6.*

7. Registration, validation of participants, travel arrangements:

Since the success of a workshop/seminar depends on the participation of all invitees, it is important to facilitate their participation. This means purchasing their flight tickets well in advance and providing invitees with all the necessary information in a timely manner, in particular to ensure they have sufficient time to obtain any necessary visas, and to process internal paper work and permissions.

7.1 When oietravel is involved in purchasing tickets, the **RAD** is responsible for validating registered participants. The validation is essential condition to proceed with any travel/logistic arrangement of participants. The **RAD** will validate participants by forwarding their registrations to oietravel (with a copy to the RR/SRR). The **oietravel** will make a flight proposal (with copy to the RR/SRR) only to participants whose registration has been validated by the **RAD**. *Related to steps 7, 9, 10.*

- a) When a registration application is received from the person mentioned in an invitation letter (Focal Point, speaker, OIE Delegate), the **RAD** automatically validates the registration.
- b) When a registration is received from a person not mentioned in an invitation letter (e.g. representative of the official Focal Point, newly appointed Focal Point) the **RAD**

will validate the registration only after having received notification of the person's official nomination by the Delegate.

7.2 The **RR/SRR** is responsible for monitoring registrations and for requesting and collecting official nominations for any participants not mentioned in invitations. Once it has obtained the official nomination, the **RR/SRR** forwards it to the **RAD** in order to allow to validate the participant's registration. The **RR/SRR** is also responsible for providing support for invitees requesting information or experiencing problems. **RAD** must be always in copy of all **RR/SRR** correspondence concerning the event. *Related to steps 7, 8, 14.*

7.3 When oietravel is not involved in purchasing tickets, the **RR/SRR** should validate the participation of registered participants upon the following criteria:

- When a registration application is received from the person mentioned in an invitation letter (Focal Point, speaker, OIE Delegate), **RR/SRR** can start the travel arrangements and all other logistic actions.

- When a registration is received from a person not mentioned in an invitation letter (e.g. representative of the official Focal Point, newly appointed Focal Point, representative of a speaker), **RR/SRR** must request the official nomination by the Delegate.

The **RR/SRR** is responsible to collect all official nominations/communications from OIE Delegates upon which participants are validated, and provide them to **RAD** at the end of the seminar. *Related to steps 10, 17.*

7.4 The **FPRD** should inform the **RAD** and the **SRR/RR** of the contact details of newly appointed Focal Points as soon as it receives official notification of their appointment. The **FPRD** should also enter any updating in the TIGER database. *Related to step 8.*

7.5 When in charge of ticket purchasing, **oietravel** periodically updates the **RR/SRR** and the **RAD** on the state of play regarding travel arrangements. *Related to step 10.*

7.6 The **RR/SRR** is responsible for sending a reminder if no response has been received from a speaker/participant after the deadline for registrations. *Related to step 12.*

7.7 In the case of travel proposals for which **Oietravel** cannot obtain any reply from the participant, the **RR/SRR** can be requested to contact the participants in order to facilitate his/her reaction and provide Oietravel with an answer on what proposed. *Related to step 13.*

8. Documents related to the outcomes of the event:

8.1 The **RR/SRR** must hand out a paper evaluation questionnaire, explain its function and invite participants to complete it, always providing them with sufficient time for this activity. The seminar secretariat should be actively involved in this phase. Web application cannot be used, with exception of cases in which each participant can use a dedicated computer for this purpose, before the end of the seminar. *Related to step 15.*

The **RR/SRR** sends to the **DDG** the final budget (see also paragraph n.2). *Related to step 17.*

The **RR/SRR** sends to the **RAD** the summary for publication in the OIE *Bulletin*, and to the WF for reporting purposes. *Related to step 16.*

The **RR/SRR** prepares a mission report, as per NS 2010/07, in consultation with the **FPRD** staff that also participated in the meeting, and sends it to **RAD**. *Related to step 16.*

The **RR/SRR** sends the **RAD** the following documents (*Related to step 17*):

- a) Scanned copies of the completed questionnaires and a report on the seminar, compiled based on an analysis of the questionnaire evaluations.
- b) All working documents and PowerPoint presentations of the training,
- c) The final list of participants (including observers, speakers, etc.)
- d) The final programme.

- e) Official nomination/delegation justifying the validation of participants: only for events for which flight tickets are not bought by Oietravel, *Related to steps 10, 17.*

8.2 The **RR/SRR** send the **FBU** all the necessary documentation to close the budget.