



## Organising ISTA Workshops

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TCOM ADMINISTRATOR	TCOM MANAGER / TCOM ADMINISTRATOR	SECRETARY GENERAL

## **SCOPE**

The purpose of this document is to give guidance on the procedures to be followed in the organisation of ISTA Workshops which take place on-site. On-line Workshop organisation is not described in this document.

Details are also given regarding the responsibilities of the various parties engaged in the organisation and administration of workshops.

ISTA and its Technical Committees are responsible for the organisation of various educational events in order to ensure the uniform application of ISTA Rules, and to keep analysts in seed testing laboratories informed about new methods and technologies in the area of seed science and technology. With this ISTA also fulfils its duty to disseminate knowledge in its area of operation.

## **RELATED DOCUMENTS**

### **For external and internal use**

The following forms and documents must be requested from the Technical Committee Administrator:

Event-F-11-Budget\_CHF

Event-F-12-Budget\_EUR

Event-F-13-Budget\_GBP

Event-F-14-Budget\_USD

Event-F-15-Financial Report

Event-F-16-Financial Report\_EUR

Event-F-17-Financial Report\_GBP

Event-F-18-Financial Report\_USD

Event-F-19-Demand for transfer of the registration fee

Event-F-21-Application for use of surplus from workshops

Event-F-22-TCOM Workshop Itinerary

Announcement template

Survey template

Example - Call for sponsorship

### **For internal use only**

Event-SOP-11-How to announce workshop at the website

Event-SOP-13-How to create workshop registration list

Event-SOP-14-Workshops registration, administration and booking

Event-SOP-07 Evaluation form set-up

Certificate template

Template Confirmation

Template Invoice

Registration List Template

## **RESPONSIBILITIES**

### **ISTA Technical Committee**

The decision to organise a workshop is with the TCOM or, for Quality Assurance Workshops, with the HoAT and AWG. For simplification in this document only the abbreviation 'TCOM' is used but everything mentioned also applies for the ISTA Accreditation Department.

Each Committee might assign a member of the committee as TCOM Workshop/Training Coordinator responsible for coordinating their workshops.

The TCOM Chair or TCOM Training Coordinator nominates a Workshop Organiser (see below). In addition, the Committee looks for a Local Organiser to collaborate with. The workshop should be included in the proposed Working Programme of the Technical Committee. The responsibility of the TCOM Chair or TCOM Training Coordinator is to confirm that the programme and the workshop content are technically and scientifically appropriate, and that the budget reflects all corresponding requirements.

### **ISTA Workshop Organiser**

The Workshop Organiser will be

- the chairperson of an TCOM, or the TCOM Workshop/Training Coordinator, or
- a member of a TCOM, or Technical Committee working group, invited by the chairperson to take on the role, or
- any ISTA Member invited by the chairperson of a TCOM to take on the role.

Once a workshop has been included in the approved Working Programme of a Technical Committee, the main responsibilities for its planning and organisation are with the Workshop Organiser.

### **Local Organiser**

The local organiser is responsible for all on side arrangements and keeps the Workshop Organiser and TCOM Administrator informed on all the undertakings of the workshop organisations.

ISTA workshops (or other ISTA TCOM-related activities) are not permitted in a country/ distinct economy where there is advice against travel by the official website of the Swiss Federal Department of Foreign Affairs, and/or the country which the ISTA workshop lecturers belong to. This is due to unpredictable security situations (travel warnings).

Workshops in these countries / distinct economies cannot be approved by the Secretary General. It will require a unanimous decision by the ECOM at the request of the Technical Committees involved for any exception to this policy. However, where suitable, on-line workshops may be organised.

### **TCOM Administrator**

Provides the Workshop Organiser with administrative assistance and takes care of the registration process.

## **ABBREVIATIONS**

TCOM: ISTA Technical Committees

TAdmin: TCOM Administrator

HoAT: Head of Accreditation and Technical Department

AWG: ISTA Accreditation Working Group

## **DEFINITION OF AN ISTA WORKSHOP**

The name 'ISTA Workshop' shall only be used for workshops that have been initiated by TCOMs or the ISTA Secretariat.

Laboratories having an interest in hosting an ISTA Workshop should get in contact with the relevant TCOM or with the ISTA Secretariat to indicate their idea for an ISTA Workshop.

The laboratory hosting an ISTA Workshop should be an ISTA Member Laboratory. The TCOM Chairperson will decide on an exemption of this rule if required.

For workshops in collaboration with other international or regional organisations, the ISTA Secretary General will decide on an exemption of this rule.

## **WORKSHOP TYPES**

Two different types of meetings, which are currently called workshops within ISTA can be distinguished:

1. Workshops for experienced laboratory leaders or seed analysts to exchange their experiences and harmonise their performance.
2. Workshops to teach knowledge in seed testing in general or in a particular field of seed testing.

## **FINANCIAL STRATEGY FOR ISTA WORKSHOPS**

ISTA Workshops are not aiming at making financial profit for the lecturers, the hosting laboratory or ISTA. ISTA Workshops need to be perceived as a service from ISTA Members to ISTA Members.

ISTA Workshops should be offered on a cost covering basis. Only direct costs shall be covered, excluding salaries of laboratory or staff of the local organizer, excluding renting of local organizer's premises. However, measures should be taken to ensure that the organisers are not in a deficiency position.

## **TIMELINE**

The announcement of the workshop and registration should open at least three months prior to the starting date of the workshop, preferably even earlier. Under certain circumstances the ISTA Secretariat may request an earlier opening of the registration (e.g., long visa procedure for the hosting country, approval of funds like Young@ISTA). Before the registration can open, the below listed Pre-Workshop Activities need to be finalised. We recommend starting with the Pre-Workshop Activities at least 6 months prior to the workshop.

## **PRE- WORKSHOP ACTIVITIES**

Overview of organisational steps before the workshop:

1. The Workshop Organiser contacts lecturers/instructors and confirms participation.
2. The Workshop Organiser together with the Local Organiser and the lecturers should create a preliminary programme.
3. The Workshop Organiser together with the Local Organiser shall identify all consumables, reagents and other materials required for the workshop.
4. The Local Organiser shall identify and reserve the facilities the workshop will be held at.
5. The Local Organiser shall assign tasks to people involved in workshop organisation.
6. All involved parties need to agree on the dates for the workshop and timetable/schedule.

7. The Workshop Organiser together with the Local Organiser shall decide on the maximum number of participants based on the nature of the workshop and the physical requirements. Common considerations are the size of the local facilities, number of available analytical instruments, computers, etc.
8. The Local Organiser is responsible for preparing the budget and set workshop fee by using the budget form provided by TAdmin.
9. The Local Organiser shall reserve a venue required for any social events (e.g. formal workshop dinner).
10. The Workshop and Local Organiser shall decide on the name of the workshop and prepare the announcement by using the template available from TAdmin.
11. The workshop and Local Organiser shall agree on the target group/ potential participants and how to reach this audience. They should decide on a promotion/advertisement plan in conjunction with the ISTA Marketing and Communication Expert.
12. The workshop and Local Organiser shall inform TAdmin and provide them with the announcement and all required information. TAdmin will publish the announcement on the ISTA website and open the online registration.
13. The Local Organiser is responsible to issue invitation letters for Visa purposes if required.

## BUDGET

All costs of the workshop will be listed in a budget. This will be the basis for the calculation of the registration fees for the workshop. Fees are calculated by dividing the total expenses by the number of possible participants. The fees for Non-ISTA Members should always be 50% higher than those for ISTA Members.

The workshop budget should be prepared based on the assumption that all participants will be ISTA members. This will define the minimum number of participants.

The Local Organiser needs to submit the workshop budget to TAdmin for approval prior the announcement.

The budget should include the following components:

Income	Description
Registration Fees	- Member - Non-member
Sponsorship	Upon decision of the Workshop Organiser

Expenditures	Description
Materials	- Reagents and chemicals - Consumables - Training material - Equipment*
Travel lecturers	- All expenses for the lectures need to be covered
Facilities and transport	- Rent of shuttle bus - Rent of lecturer room (if the laboratory has not enough space)
Catering and social events	- Lunch - Coffee breaks - Official Dinner - Excursion

<b>Expenses of ISTA</b>	- Certificates
<b>Overhead</b>	- Printing of hand-outs - Shipment Costs - Certificates - USB memory sticks for ISTA Information material and other documents - Presents

\* Equipment is not allowed to be bought by using the workshop funds.

## DETAILED DESCRIPTION OF SELECTED BUDGET COMPONENTS

### Materials

To define what material needs to be bought for the workshop a close cooperation between the workshop organiser and the local organiser is required. Equipment for the hosting laboratory is not allowed to be bought by using the workshop funds.

### Travel lecturers

All expenses for the travel of lecturers to and from the workshop venue are listed. (Example: flights, other transportation, accommodation, visa, meals and beverage)

The travel and accommodation of lecturers are booked through ISTA Secretariat, by TAdmin. Flights are booked according to the best cost/performance ratio and only in Economy Class. Accommodation is booked according to the effective cost. Meals and beverage cost should not exceed the amount of Swiss Francs CHF 90.00 per day.

TAdmin will provide the Travel Itinerary to the lecturers and local organiser.

### Facilities and transport

All expenses for renting workshop items as well as transportation costs related to the participants should be listed (Example: rent for shuttle bus).

No renting costs shall be paid to the hosting laboratory.

### Catering and social events

All expenses concerning catering and social events for the workshop should be listed (Example: coffee breaks, lunches, official dinner, excursions).

### Overhead

Exceptional expenses such as printing of hand-outs, shipment costs should be listed. Furthermore, the cost for an USB memory stick for each participant shall be added (if not sponsored by any company). The USB memory stick will be used for ISTA Information material and other documents as required.

### Expenses of ISTA

All expenses of the ISTA Secretariat will be added by the secretariat. The secretariat will not charge any service fee for handling the registration of participants.

### Sponsoring

All sponsored material, social events and monetary sponsoring needs to be included in the budget. Non-monetary sponsoring has also to be listed under the corresponding expenses.

### Summary

On the last page of the budget template the required income and the registration fee will be calculated automatically.

## **ANNOUNCEMENT**

Detailed information can be found in the announcement template.

## **REGISTRATION**

In general, it is preferable that the deadline for registration is at least one month before the event. In this way it is more certain that the participants will be able to pay before the workshop starts, to receive Visa and plan their travel.

TAdmin together with the ISTA Administration will be responsible for the registration and invoicing. After registering online via the ISTA website, the participants will receive an Email with the corresponding invoice.

Upon receipt of the payment of the registration fee by the participant, an Email with the final confirmation will be sent to the participant. The participants will be asked to bring a copy of the final confirmation to the workshop.

Each participant who has attended at least 80% of the workshop will receive a certificate of participation signed by the workshop lecturers. The certificates will be sent by TAdmin to the Local Organiser latest one week prior to the start of the workshop.

The registration fees are collected on behalf of the Local Organiser. Funds will be transferred to the Local Organiser after the registration deadline or as needed.

Furthermore, TAdmin will update on a regular basis the Local Organiser and lecturers with the list of registered participants.

If there are more participants than the maximum number agreed, a waiting list will be opened. In the case of cancellations, ISTA Members will have priority on the waiting list; after ISTA Members, priority will be given in accordance with the date of registration.

Staff members of the hosting laboratory who are interested in participating in the workshop must register and pay the fee to the ISTA Secretariat under the same terms and conditions as other participants. If the laboratory of the Local Organiser is not an ISTA laboratory, staff members may register for the workshop at the reduced membership fee.

## **INVITATION LETTER**

Some participants may need an invitation letter for obtaining an entry visa, which must be prepared by the Local Organiser. The invitation letter shall be issued only if workshop registration payment has been received. Local Organiser together with TAdmin can decide on an exemption of this rule, in special cases (e.g. when invitation letter is needed for participation approval/budget approval).

Please note, the identity of prospective participants should be confirmed to ensure that the participant is genuine, and that letter of invitation is not being used for covert purposes.

## **ACCOMMODATION AND TRANSPORTATION**

A special price for the participants of the workshop at a hotel nearby the workshop venue should be negotiated by the Local Organiser. Furthermore, a shuttle bus from the hotel to the workshop venue should be organised, if necessary.

## **MATERIALS**

The Local Organiser should collect a list of all the equipment, reagents and consumables necessary for the workshop from the lecturers. It is the Local Organiser's responsibility to confirm that all required materials will be available at the workshop venue/laboratory.

If possible, the lecturers should provide their presentations beforehand. In which case it is the Local Organiser's responsibility to prepare hand-outs for all participants.

## POST WORKSHOP ACTIVITIES

Overview of organisational steps after the workshop:

1. Expenses: The Local Organiser is responsible for preparing the financial report which must be submitted to TAdmin.
2. The Workshop Organiser together with the lecturers and Local Organiser are responsible for writing the workshop report which will be published in Seed Testing International posted on the ISTA website.
3. Workshop online-survey: The standard template will be sent by TAdmin.

## EXPENSES

A financial report should be submitted to TAdmin within three weeks after the workshop. The template 'Financial report' must be used.

**All expenses must be allotted according to the budget categories.**

All relevant receipts must be provided. The receipts should be numbered, and the corresponding numbers be referred to in the expense report. Example: Copy of the shuttle bus rent invoice nr. xx has to be listed in the column 'facility and transportation' of the financial report ('xx. Shuttle bus rent')

**Receipts in languages other than English** should be complemented with a short explanation in English, either on the official financial report form or on the invoices/receipts themselves.

If diverse currency is used the **exchange rate should be stated** (for example by using [www.oanda.com](http://www.oanda.com)).

## USE OF THE REMAINING FUNDS

A thinkable profit arising from a workshop should be shared in equal parts by the hosting laboratory and the organising TCOM/TCOMs (if more than one Committee involved in the Workshop). The hosting laboratory and TCOM/TCOMs can individually decide on the use of their profits.

Three different possibilities are listed:

- The profit from the workshop is donated to ISTA. The amount will be included in the general ISTA account and administered under the responsibilities of the ISTA Executive Committee. This is always the case for QA Workshops.
- The profit will be put into a trust fund of the TCOM responsible for the workshop the profit was gained at and used for activities of this particular TCOM under the responsibility of the Chairperson of the Committee. The ISTA Secretariat will administer the trust fund of each TCOM. The profit needs to be spent by the TCOM within the following two calendar years after the Workshop, otherwise it goes into the ISTA general budget fund.
- The profit will be kept by the hosting laboratory/lecturers of the workshop for their own use.

## EXCESS EXPENDITURE

Should expenditure for the workshop exceed the amount granted by the registration fee, the difference must be covered by the hosting laboratory.

## TRANSFER OF FUNDS TO THE LOCAL ORGANISER

Funds may be transferred from the ISTA Secretariat to:

**Preferably** - an account set-up for the ISTA Workshop at the institution of the Local Organiser

**Alternatively** - an existing account of the institution of the Local Organiser

The Local Organiser must fill in the request of transfer and send it to the ISTA Secretariat before any transaction can be executed.



## **PARTICIPATION SURVEY**

The standard template will be sent by TAdmin. The Workshop Organiser, Local Organiser and lecturers will receive a report about the outcome of the survey.

## **ANNEX**

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## **DISTRIBUTION LIST**

TCOM Chairs / ECOM Liaison Officers

Accreditation Department

TCOM Workshop/Training Coordinators

Workshop Organisers

Local Organisers

TCOM Manager

TCOM Administrator

## **REVISION HISTORY**

Version #	Changes
2.0	Complete review
3.0	Transfer to the new layout
4.0	Clarification of timeline
5.0	Restriction of organising ISTA Workshops in countries with travel warnings (based on ECOM decision)