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Procedure Organising ISTA Workshops

Note: Any copies of this document are not subject to change service

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Table of Content

Scope..... 3

Related documents..... 3

Responsibility and Abbreviations..... 4

Definition of an ISTA Workshop 4

Workshop types 5

Financial Strategy for ISTA Workshops 5

Pre workshop activities 5

Budget 6

Detailed description of selected budget components 7

Announcement..... 8

Registration..... 8

Invitation letter..... 9

Accommodation and transportation..... 9

Materials..... 9

Post workshop activities 9

Expenses 9

Use of the remaining funds 10

Excess expenditure..... 10

Transfer of funds to the Local Organiser 10

Workshop Report 10

Participation survey 10

Distribution List 10

SCOPE

The purpose of this document is to give guidance on the procedures to be followed in the organisation of ISTA Workshops. 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.

RELATED DOCUMENTS

For external and internal:

The following forms and documents have to be requested from the [Technical Committee Coordinator](#):

Event-F-10-Workshop organisation checklist
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
Announcement template
Workshop newsletter template
Survey template
Example - Call for sponsorship

Only for internal use:

Event-SOP-11-How to announce workshop at the website
Event-SOP-12-How to update ISTA Event Calendar
Event-SOP-13-How to create workshop registration list
Event-SOP-14-Workshops registration, administration and booking
Event-SOP-07 Evaluation form set-up
TCOM-SOP-12-How to prepare picture for the website
Certificate_template
Template_Confirmation
Template_Invoice
Registration List_Template

RESPONSIBILITY

ISTA Technical Committee - TCOM

The decision to organise a workshop is with the TCOMs or for Quality Assurance Workshops with the ISTA Accreditation Department. For simplification in this document only the word "TCOMs" 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 TCord informed on all the undertakings of the workshop organisations.

TCOM Coordinator - TCord

The TCord provides the Workshop Organiser with administrative assistance and takes care of the registration process.

Responsibilities are described more detailed under point 5 "Pre Workshop Activities" and 6 "Pre Workshop Activities".

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 can decide on an exemption of this rule if required.

For workshops in collaboration with other international or regional organisations, the ISTA Secretary General can 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 local organizer staff, excluding renting of local organiser's premises. However, measures should be taken to ensure that the organisers are not in lost.

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 it dictates. 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 (to be provided by the TCord).

9. The Local Organiser shall reserve accommodations and 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 the TCord.
11. The workshop and Local Organiser shall agree on the target group / potential participants and how to reach this audience. Decide on a promotion / advertisement plan.
12. The workshop and Local Organiser shall inform the TCord and provide them with the announcement and all required information. The TCord will publish the announcement on the ISTA website, send out a newsletter 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 budget needs to be submitted to the Workshop Organiser and the TCord 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* ¹
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 sufficient space)
Catering and social events	- Lunch - Coffee breaks - Official Dinner - Excursion
Expenses of ISTA	- Certificates
Overhead	- Printing of hand-outs

	<ul style="list-style-type: none"> - Shipment Costs - Certificates - USB memory sticks for ISTA Information material and other documents - Presents
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*¹ Equipment should not be bought using the workshop funds.

The Local Organiser should provide a workshop budget to the Workshop Organiser and TCord prior the announcement. The budget should be prepared using the Budget form.

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 should not be bought from the workshop funds.

Travel lecturers

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

1. Flights should be booked according to the best cost / performance ratio and only in Economy Class.
2. For overnight stays, the effective accommodation costs can be claimed for hotels.
3. Meals should not exceed the amount of Swiss Francs CHF 150.00 per day.

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 (e.g. for certificates) 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. Furthermore the Local Organiser is requested to submit one or two pictures for the announcement.

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.

The TCord together with the ISTA Administration Department will be responsible for the registration and invoicing. After registering online on the ISTA website, the participants will receive an email with the corresponding invoice.

Upon receipt of the payment of the registration fee from 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 from ISTA Secretariat 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 the TCord prepares a registration list with all details and will send it to the Workshop and Local Organiser with the latest updates on a regular basis.

If there are more participants than the maximum number agreed, a waiting list will be started. In this case of cancellations, ISTA members should have first priority and there after 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 have to 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 has to be prepared by the Local Organiser. The invitation letter shall be issued only if workshop registration payment has been made.

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.

The Local Organiser is responsible for booking the hotel for the lecturers and pick them up at the most convenient place agreed with the lecturer, e.g. airport, rail or bus station and send them off.

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 that 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 will be submitted to the TCord.
2. The Workshop organiser together with the lecturers and Local Organiser are responsible for writing the workshop report that will be published in the Seed Testing International and on the website.
3. Workshop online-survey: The standard template will be send from the TCord.

EXPENSES

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

All expenses must be allotted according to the budget categories.

All relevant receipts should 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 rubric 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).

USE OF THE REMAINING FUNDS

A thinkable profit arising from a workshop should be shared 50:50 by the hosting laboratory and the organising TCOM. The hosting laboratory and TCOM 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.
- 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 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 has to fill in the request of transfer and send it to the ISTA Secretariat before any transaction can be executed.

WORKSHOP REPORT

The Workshop Organiser together with the lecturers and Local Organiser are responsible for writing the workshop report. The organisers are also requested to submit pictures of the workshop for this report. The secretariat will publish the report in the Seed Testing International and on the website.

PARTICIPATION SURVEY

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

DISTRIBUTION LIST

TCOM chairs / ECOM liaison officers

Accreditation Department

TCOM Workshop/Training Coordinators

Workshop Organisers

Local Organisers

TCord

REVISION HISTORY

Version #	Changes
2.1	Changes made only for reasons of clarification