

Operational handbook for the organization of Meetings and Conferences away from headquarters



DCMM

Department of Conferences and Meetings Management
General Secretariat
Washington, D. C.

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Department of Conferences and Meetings Management

General Secretariat

Washington, D. C.

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Nestor Mendez
*Assistant Secretary General of
the OAS*

MESSAGE FROM THE ASSISTANT SECRETARY GENERAL

It gives me immense pleasure to present to you the Operational Handbook for the organization of Meetings and Conferences, a reference guide to the services offered by the Department of Conferences and Meetings Management (DCMM), whose mission is to efficiently provide the logistical services needed to ensure the successful holding of the Organization's meetings away from headquarters in the member states.

By effectively managing OAS meetings, the DCMM helps to strengthen dialogue and cooperation among member states, the Organization's political bodies, and the institutions of the inter-American system, in keeping with the provisions of Article 1 of the OAS Charter as regards achieving an order of peace and justice, promoting solidarity among American states, strengthening their collaboration, and defending their sovereignty, territorial integrity, and independence.

The Office of the Assistant Secretary General relies on the DCMM to provide cutting-edge technological infrastructure and conference services of the very highest quality to all member states, specialized organizations, agencies and entities of the inter-American system, as well as to the different areas of the General Secretariat.

I hope that this handbook will be of great use in preparing and staging meetings that will allow member states to adopt decisions and measures for meeting the Hemisphere's challenges. I would also like to wish all delegates success in the performance of their functions and reiterate the wholehearted commitment of my team to continue supporting and working with all delegations in the important work that they do for the benefit of the region.

Introduction

This Handbook presents an overview of the necessary considerations that go into preparing a meeting in the framework of the Organization of American States (OAS), away from headquarters. It is a step-by-step guide on how to organize a conference or meeting, from conception to completion.

Meetings vary depending on their category and needs. The examples cited in the Handbook will serve as a guide for users.

The Handbook also seeks to simplify the organization of meetings and provide organizers with relevant information, including organizational schedules for different types of events and details about available technological tools, meeting rooms, setup options, and the range of services that can be delivered.

Finally, the Handbook provides examples that facilitate decision-making. At the same time, it is designed as a reference resource for conference and meeting organizers to consult on different elements and details for successfully staging an event.

DECEMBER 2017



PERU
REPUBLICA DEL PERU
SANTO SPIRITO
AND TACNA

SANT LUCIA

SANT VINCENT AND
THE GRENADINES

SURINAME

TRINIDAD
AND TOBAGO

URUGUAY

VENEZUELA

ANTIGUA
AND BARBUDA

ARGENTINA

PANAMA

I. CONFERENCES AND MEETINGS

I.

CONFERENCES AND MEETINGS

GENERAL PROVISIONS

According to Article 112 (d) of the Charter of the Organization of American States, the functions of the General Secretariat (GS/OAS) include providing adequate secretariat services on a permanent basis for the General Assembly and the Organization's other organs, and to carry out their directives and assignments. In addition, to the extent of its abilities, its functions also include providing meetings services for the organs, agencies, units, and line areas of the Organization.

GS/OAS performs these functions through the Department of Conferences and Meetings Management (**DCMM**), which is responsible for providing the necessary technical and specialized advice to coordinate and run conferences and meetings. **DCMM** also provides technical information and proposed budgets for planning, programming, and organizing the Organization's meetings and conferences.

The line areas establish the basic objectives of the conference or meeting in their particular fields, prepare the necessary technical materials, issue the relevant invitations to all participants, and coordinate with the **DCMM** on the preparations and operational aspects of meeting.

Other departments and offices will provide specialized services in their respective areas of responsibility to facilitate operational aspects of the meeting.

The Conferences Section is responsible for keeping the schedule of conferences and meetings of the Organization and other organs and agencies of the inter-American system up to date, so as to facilitate scheduling of events to be held and ensure optimal use of available resources.

This Handbook and the procedures, protocols, and tasks it includes apply to meetings managed by **DCMM**. Although most of the procedures described concern meetings held away from headquarters, they are equally applicable to all OAS meetings; only in specific cases is there special mention of procedures that apply exclusively to General Assembly sessions.

PROCEDURES

The procedures to be followed for conference-related activities should adhere to the pertinent executive orders, administrative memorandums, rules, and programming for hiring personnel, goods and services procurement, reporting, and expense control. Any special directives or authorizations needed in relation to conferences should be sought through the regular channels.

The general plan for formalities and procedures to be followed in preparing, implementing, and checking conference operations is established in accordance with the provisions in force.

CONSIDERATIONS AND PROCEDURES FOR CONFERENCES HELD AWAY FROM HEADQUARTERS

In keeping with Permanent Council resolution CP/RES. 982 (1797/11 of March 30, 2011, the following summary of the responsibilities and obligations of parties is submitted for the use of member state governments interested in hosting OAS conferences and meetings.

When offering to host a conference or meeting, a country's government should take the following into account:

- In deciding on a date for a meeting, the dates and venues of other meetings must be taken into account and efforts should be made to coordinate them to ensure that services and resources are used as economically as possible. Considerations should also be given to the deadlines and timeframes stipulated in agreements for meeting technical and procedural requirements ahead of the event.
- The host country government must bear the costs of: air, maritime, or ground transportation for all OAS staff assigned to provide technical, logistical, or secretariat services; supplying the premises, facilities, offices, local staff, equipment, and materials specified in the agreement or letter of understanding. It will also make the necessary arrangements for reserving accommodation ; customs clearance (temporary entry) for GS/OAS equipment and materials, transportation of freight from airport to meeting venue and back to airport after the meeting; local shuttle transportation for GS/OAS delegates and staff to and from hotels, meeting-related activities, and the meeting venue; and security and medical services.
- In accordance with the current provisions, GS/OAS will prepare the proposed budget using the procedures and cost of the meeting at headquarters as a frame of reference. The government will be responsible for paying the difference between the amount allocated in the Organization's Regular fund budget and the GS/OAS cost estimate, before the meeting starts. At the end of the fiscal exercise for the meeting (or before), the General Secretariat must submit a statement of accounts for expenses incurred and will make the corresponding final adjustments, either by charging the remainder of the actual cost or reimbursing the government for the unused amount, all to be reflected in the agreement or letter of understanding.

OFFERS TO HOST MEETINGS

Member states wishing to offer to host should notify the Secretary General in writing within the period fixed by the General Assembly or the political body in charge of the meeting in question, as appropriate. That period should not be less than six months before the meeting is due to start, unless the relevant political body decides otherwise.

VENUE AND DATE

The venue and date of a meeting are usually set at the same time. Where the resolution containing the offer to host only states the time of the year when the meeting should take place, the relevant political body will determine the date in consultation with the host country.

CONVOCATION

Once the Permanent Council or the appropriate political body has adopted the relevant resolution, the notice of convocation for a meeting is usually prepared by the corresponding area of the GS/OAS. In the case of the General Assembly, it is done by the Secretariat of the Permanent Council; for CIDI, by the Executive Secretariat for Integral Development; for others, the technical secretariat for the meeting does so. For meetings held away from headquarters, the notice of convocation is prepared in consultation with the host country.

AGENDA AND SCHEDULE

The meeting's agenda, schedule, and rules of procedure are prepared by the appropriate political body or the specialized agencies concerned and submitted to the member state governments for consideration ahead of the meeting.

RULES OF PROCEDURE

All OAS meetings must have rules of procedure for the conduct of their discussions. In their absence, the Rules of Procedure of the General Assembly are used.

LISTA DE ASISTENCIA

Para efectos de registro, solicitamos muy atentamente escribir su nombre con letra legible y firmarla en la casilla correspondiente.
 For registration purposes, we kindly request that your name is legibly written and the appropriate box is signed below.

SALON		FECHA	
SESION		N° DE SESION	

PAIS	NOMBRE DEL REPRESENTANTE	FIRMA
HAITI		
HONDURAS		
JAMAICA		
MÉXICO		
NICARAGUA		
PANAMÁ		
PARAGUAY		
PERÚ		
REPÚBLICA DOMINICANA		
SAINT KITTS AND NEVIS		
SAINT LUCÍA		
SAINT VICENTE AND THE GRENADINES		
SURINAME		
TRINIDAD AND TOBAGO		
UNITED STATES OF AMERICA		
URUGUAY		
VENEZUELA		

LISTA DE ASISTENCIA

Para efectos de registro, solicitamos muy atentamente escribir su nombre con letra legible y firmarla en la casilla correspondiente.
 For registration purposes, we kindly request that your name is legibly written and the appropriate box is signed below.



OEA / OAS

SALON		FECHA	
SESION		N° DE SESION	
		HORA INICIO	
		HORA FIN	

PAIS	NOMBRE DEL REPRESENTANTE	FIRMA DEL REPRESENTANTE
ANTIGUA AND BARBUDA		
ARGENTINA		
THE BAHAMAS		
BARBADOS		
BELIZE		
BOLIVIA		
BRASIL		
CANADA		
CHILE		
COLOMBIA		
COSTA RICA		
DOMINICA		
ECUADOR		
EL SALVADOR		
GRENADA		
GUATEMALA		
GUYANA		

II.

PARTICIPANTS

II.

PARTICIPANTS

DELEGATIONS

Member state delegations will comprise representatives, advisers, and such other members as the governments may accredit. Each delegation will have a head of delegation, who may delegate their functions to any of its members.

PERMANENT OBSERVERS

Permanent observers may attend open sessions of OAS meetings. The presence and conduct of observers at a meeting are governed by its rules of procedure.

OAS ORGANS

The chairs or representatives of the following organs and agencies of the inter-American system may attend the General Assembly and other meetings: the Inter-American Juridical Committee, the Inter-American Commission on Human Rights, the Inter-American Court of Human Rights, and specialized inter-American agencies.

SPECIAL GUESTS

Special guests, including civil society organizations may attend, with the consent of the government of the host country and the authorization of the relevant council or political body.

REGISTRATION AND ACCREDITATION

The delegations that are to take part in OAS meetings must be accredited in accordance with the established procedures. For the General Assembly, every delegation must send the Secretary General an accreditation note, which **DCMM** will use for approval of the accreditation, to prepare and deliver the appropriate ID cards and to then draw up the list of participants.



OEA | Más derechos
para más gente

ACUERDO E
GOBIERNO DE LOS ESTAD
Y
LA SECRETARÍA G
ORGANIZACIÓN DE LOS E

RELATIVO A LA CE
CUADRAGÉSIMO SÉPTIMO PERI
DE LA ASAMBLA

Suscrito en Washington, D



III. PRE-MEETING STAGES

III.

PRE-MEETING STAGES

AGREEMENT/LETTER OF UNDERSTANDING

The responsibilities of the host country and the GS/OAS will be set out in an agreement or letter of understanding, depending on the level or scope of the meeting. The **DCMM** prepares and negotiates the agreement in coordination with the other OAS areas involved in the meeting and with the approval of the Department of Legal Services and the Department of Financial Services.

Under Article 112.d of the OAS Charter, the General Secretariat is in charge of the organization, administration, and operation of meetings. According to Executive Order No. 08-01, rev. 9, it carries out these functions through the Office of the Director of the **DCMM**. In turn, the host country Government will also designate a logistics coordinator who will work with the GS/OAS coordinator to address all matters related to the facilities, personnel, materials, protocol, services, and equipment needed for the meeting to proceed properly.

COORDINATORS

A national coordinator (designated by the host country) and a GS/OAS coordinator will be appointed to facilitate the preparations for and conduct of the meeting. They will be responsible for the meeting's organization, management, and logistics.

The coordinator designated by the host country's government will be responsible for the services and facilities pledged by the host country, as stipulated in the headquarters agreement/letter of understanding, including support for administration, security, accommodation, facilities, transportation, etc.

The host-country coordinator establishes the control systems required to safeguard the equipment, materials, and supplies specifically needed for the meeting. Notwithstanding the responsibility of the host country's government, both coordinators may authorize one or more members of their staff to certify the receipt of materials or equipment sent to the other party. Both have executive and decision-making functions in the joint operations of meetings.

As needed, before and during meetings, the GS/OAS will provide technical support, technical secretariat services, specialized personnel, and documents relating to the agenda; it will also arrange for equipment and materials to be sent from headquarters (Washington, D.C.) to the meeting venue.

To fulfill its responsibilities and functions at the meeting, the GS/OAS will administer the funds approved in the Organization's budget for that purpose, the host country government's contribution, and external funds, if any, deposited with the General Secretariat to support the meeting.

BUDGET

The agreement/letter of understanding sets out the financial obligations of both the host country and the GS/OAS in accordance with the draft budget prepared by **DCMM** for the meeting. In the case of meetings held away from headquarters, the draft budget, which will cover the transfer of GS/OAS services to the host country, will be submitted to the host country for consideration.

ORGANIZING COMMITTEE

It is customary for the host country to appoint an organizing committee for the meeting. This committee coordinates, organizes, and plans all the operational and logistical aspects that are the responsibility of the host country government. The committee's composition is left to the discretion of the host country government. It is advisable for its members to include officials or personnel with experience or expertise in delivering the services under the purview of the host country. The GS/OAS will present an organization outline and it is hoped that the host country will appoint counterparts responsible for the various activities.

CONFERENCE PREMISES - GENERAL REQUIREMENTS

The GS/OAS uses a similar structural operations system for all its meetings. The number of meeting rooms varies according to the working committees. Like meeting rooms, office spaces vary in line with the meeting's size. To facilitate GS/OAS-host country interaction, the **DCMM** will prepare draft floor plans for each facility that will be used. This first draft is negotiated with the host country and, once an agreement is reached, the final version of the floor plans is delivered for implementation.

PLENARY SESSION ROOMS

For plenary sessions a large room is needed with a capacity of between 200 and 800 people, depending on the type of event. A ministerial meeting usually requires a plenary room for 150 to 200 participants, while the General Assembly needs a plenary room that can fit at least 800. The room should have a table arranged in a U or V shape, with chairs for 34 heads of delegation around it and, behind these, three rows of chairs for alternate delegates, under a 1-plus-4 scheme. A head table is also set up with 7 or 9 places for the Chair and secretariat. Behind the head table, the flags of the Organization's member states should be placed in Spanish alphabetical order, with the host country flag and the OAS flag in the center. Tables and chairs should also be installed for observers

and organs and agencies of the inter-American system, as should chairs for invited guests and tables for documents. An area should be set aside for journalists, with a platform for cameras, taking care to ensure that they do not obstruct or interfere with the view of delegates or the interpretation booths. The room should be equipped with a sound amplification system, interpretation equipment, professional recording equipment, interpretation booths, and wireless Internet access, screens, laptops, and image projectors. (See the Checklist in the Appendixes.)

ROOMS FOR COMMITTEE MEETINGS

For committee meeting rooms, tables should normally be arranged in a U or T shape, with chairs for 34 delegates and two rows of chairs behind the delegates (1-plus-2 layout) and a head table for 5 people. They should also be outfitted with interpretation equipment, professional recording equipment, and wireless Internet access. The host country flag and the OAS flag should be placed on either side of the head table.

ROOMS FOR WORKING GROUPS

Working group meetings normally use small rooms that can accommodate around 34 people. The room should have wireless Internet access and a rectangular or “T” shaped table, with a head table for 3 people. About 34 chairs should be arranged around the table. Some of these meetings will require simultaneous (one-way or two-way) interpreting. Therefore, it is advisable to take such an eventuality into account from the outset and make the necessary provisions accordingly. These rooms are normally equipped with a microphone system, either wired or wireless.

DELEGATION SUPPORT OFFICE/DELEGATES LOUNGE

This is an office or lounge to provide general support to delegations at meetings. It should have an appropriate number of computers and printers, as well as wired and wireless Internet access. Since the introduction of the Eco-Guide greening initiative which, among other things, encourages delegates to avoid using printers and paper in general, this room is increasingly used as a workspace during meetings.

EQUIPMENT AND SUPPLIES

Appendix II of the Agreement or Letter of Understanding usually covers everything related to the equipment and supplies needs of meetings. In order to ensure that the various technical secretariat services are efficiently delivered and that the meeting goes off successfully, the necessary equipment must be in place. That includes a simultaneous interpretation system, a professional recording system, servers, computers, photocopiers, office supplies, and the necessary furniture for operations (desks, tables, chairs, lights, projectors, screens, etc.). (See the Checklist in the Appendixes.)

For the General Assembly, the host country must ensure the expedited entry and departure of equipment free of any and all customs fees. This is known in most cases as temporary entry.

COMMUNICATIONS

The host country facilitates all necessary communications for the smooth conduct of meetings. This will include internal telephones, lines with international direct-dialing capability, and a high-speed Internet connection.

TRAVEL

While the GS/OAS purchases the tickets for staff traveling to provide secretariat services at meetings, the host country may decide, however, to purchase tickets at its own expense. In the specific case of the General Assembly and ministerial meetings, the **DCMM**, in coordination with the Department of Procurement, seeks the best price and itinerary options and channels ticket purchases and issuance through a single travel agency.

OAS rules on official travel apply to all GS/OAS staff. In terms of per diem and terminal expenses, the rates published by the GS/OAS Department of Human Resources for the date of travel are applied in accordance with the Staff Rules (Chapter VIII “Travel”).

Regarding meeting participants, the GS/OAS will pay the travel expenses of government officials from the member states only when they are traveling on behalf of the Organization. [Resolution AG/RES. 1230 (XXIII-O/93), Chapter III.A,5].

LOCAL TRANSPORTATION

The host country arranges local transportation to shuttle delegates and GS/OAS staff from the airport to their hotels and to all activities organized in the framework of the meeting. For General Assembly sessions, the host country usually offers foreign ministers, government ministers, or heads of delegation a chauffeur-driven car. The latter is not an obligation but rather a courtesy that the host country extends to heads of delegation.

AIR FREIGHT

For General Assembly and ministerial meetings, the GS/OAS arranges for the necessary documents, equipment, and supplies to be shipped for the meeting. Customs clearance is the responsibility of the host country. Given each country’s customs rules, it is sometimes simpler to process the temporary admission or customs clearance through the office of the OAS General Secretariat in the host country.

INFORMATION BULLETIN

For the General Assembly and most meetings, GS/OAS publishes an Information Bulletin for distribution to the permanent missions, permanent observer countries, organs of the inter-American system, and other agencies and special guests. The **DCMM** prepares the Bulletin using host country-supplied information of general interest to participants, such as the meeting dates, the exact venue, recommended hotels, registration and accreditation procedures for participants, requirements to

enter and leave the country, travel arrangements, contact information for organizers, links to meeting documents, weather, time zone, electricity voltage, etc. The final version of the bulletin is sent to the host country's national coordinating office before it is distributed; in the case of ministerial meetings, it is also sent to the relevant GS/OAS technical area to make any suggestions or amendments it considers appropriate prior to publication and distribution.

The first page of the model Information Bulletin contains a box encouraging delegations to obtain the documents from the meeting web page, as well as a quick response (QR) code. This helps significantly to reduce requests for printed documents in keeping with the GS/OAS "paper-light" policy. See Model Information Bulletin in the Appendixes.

IDENTIFICATION CARDS

An ID card is usually delivered at the time of registration at meetings. It should display the Organization's logo, name of the meeting, date, and the name of the participant and the country or organization that he or she represents. ID cards for high-level meetings also include a photograph of the holder and are color-coded to identify heads of delegations, delegates, observers, guests, the media, the secretariat, etc.

FLAGS

Optional at ministerial meetings but mandatory for the General Assembly, the flags of all of the Organization's member states are flown in front of the venue building. They must also be arranged in meeting rooms, as follows: facing the audience, from right to left, in the Spanish alphabetical order. Depending on the protocol and ceremonial procedures of the host country, in certain cases the host country's flag is placed first (on the right) and the OAS flag at the other end (on the left); in other instances both flags are placed in the center, with the other flags arranged in alphabetical order from right to left. Where only the host country flag and the OAS flag are used, the country flag goes on the right, facing the audience, and the OAS flag, on the left.



OEAS/OAS

Glosario Institucional
Institutional Glossary
Glossaire Institutionnel
Glossário Institucional

Español English Français Português

IV. DOCUMENTS AND OFFICIAL LANGUAGES

IV.

DOCUMENTS AND OFFICIAL LANGUAGES

Delegations wishing to submit documents for the meeting to consider should send them to the Secretary General, the Secretariat of the respective Council, or the technical secretariat for the meeting. These areas are responsible for starting the processing of documents in the Organization's electronic document management system (IDMS). Processing a document normally takes 4 to 7 working days, depending on its length, the languages required, and complexity. Personnel responsible for document control, language services, and printing are not authorized to accept documents for translation or reproduction directly from delegations.

DOCUMENT PROCESSING

Documents should be processed electronically, using the IDMS. If it is decided not to use electronic services, a record of document processing must be kept manually.

TRANSLATION

Meeting documents are generally distributed in the Organization's four official languages (English, French, Portuguese, and Spanish). Original documents submitted in one of the four official languages are translated into the other three languages, unless otherwise specified. When documents are submitted in more than one language, delegations must specify which is to be taken as the original language. Working Group documents are submitted in two languages (English and Spanish) and are translated and published in all four languages for presentation in Committees or the Permanent Council. In the interest of streamlining the translation process, it is essential to include all available references and previous versions, if any, in the translation request.

Delegations wishing to submit documents or texts that need to be translated should do so through the committee secretary or the technical secretariat, along with the digital version in Word format. Delegations should submit those documents sufficiently in advance, as earlier stated.

INTERPRETATION

Simultaneous interpretation into the four official languages is provided for most of the Organization's meetings. Technical or working group meetings will be provided with interpretation into three or two languages, as needed.

When a meeting is being scheduled, it must be borne in mind, among other things, that interpreters work 6-hour shifts, divided into two 3-hour periods with a 15-minute grace period for either period, and a rest break of at least 1 hour between the two periods. If a meeting runs beyond the six-and-a-half-hour day or a 1-hour rest break is not offered before a period of 4 consecutive hours is completed, the secretariat must arrange for an additional team of interpreters or pay for overtime. For two-way interpretation, interpreters work a four-hour shift with a grace period of 30 minutes.

In order to allow the necessary preparation time for interpretation services, the technical secretariat should furnish interpreters with copies of texts, presentations, or documents that delegates will be using for their statements.

The **DCMM** follows International Association of Conference Interpreters (AIIC) standards in matters relating to the hiring interpretation services, booths, facilities, and equipment used to provide such services.

RECORDINGS IN THE ORIGINAL LANGUAGE

General Assembly sessions (plenary and General Committee), ministerial are recorded in the speaker's language. When audio needs to be recorded in another language for mass media use, the written authorization of the interpreters must be obtained in advance. When services are requested for a meeting, professional audiovisual equipment and digital recording needs should be borne in mind.

PRESS

The host country must provide a work area for media representatives. The space should include an international media center (IMC) equipped with the necessary services to meet journalists' needs, including furniture, audio signals, a high-speed Internet connection, electrical outlets, etc.

WEBCAST

During the General Assembly, the host country provides the necessary (human, technical, and financial) resources for webcasts (live and on-demand video and audio transmission over the Internet) with sufficient bandwidth to cover the sessions to be broadcast. The resources and services needed are specified in the relevant appendix to the headquarters agreement signed by the host country and the GS/OAS.

PRINTSHOP

The **DCMM** Documents Section provides document printing services for GS/OAS conferences and meetings. Document printing requests are received from the technical secretariat and, upon completion, the job is delivered to distribution or the meeting room, as required.

USE OF OFFICIAL LETTERHEAD

Official documents of OAS meetings have a cover page with the Organization's letterhead at the top, where the name of the meeting and the seal of the Organization are placed. Letterheads come in different colors, depending on the language: **blue for Spanish**, **green for English**, gray for Portuguese, and **red for French**.

DOCUMENT DISTRIBUTION

During meetings, documents are physically and electronically delivered at the distribution center, to the delegations, directly to meetings rooms, or in cubbyholes, as necessary. For meetings at headquarters, the Office of the Secretariat to the General Assembly, the Meeting of Consultation, the Permanent Council, and Subsidiary Organs distributes documents daily by electronic means only. The Documents Section continues to distribute documents for CIFTA, CICTE, and MESICIC, among others, electronically.

V.-MX150517-rev May 19



**FORTY-SEVENTH REGULAR SESSION OF
THE GENERAL ASSEMBLY OF THE OAS**
June 19 to 21, 2017
Cancún, Quintana Roo – Mexico

INFORMATION BULLETIN

The delegations may obtain the documents at the following web page:

www.oas.org/47ag



1. Site of the General Assembly session

The forty-seventh regular session of the General Assembly of the Organization of American States (OAS) will be held from June 19 to 21, in the city of Cancún, Quintana Roo. The sessions will be held at the Moon Palace Arena Convention Center.



Carretera Cancún-Chetumal Km. 340, Cancún, Quintana Roo, Mexico. C.P.77500

V.

OTHER CONCERNS

V.

OTHER CONCERNS

ORDER OF PRECEDENCE AND NAME PLATES

Where the rules of procedure for a meeting so establish, the first delegation in the order of precedence is determined by lot and continues thereafter in Spanish alphabetical order. If lots are not drawn, the alphabetical order in the language of the meeting's host country is used. The order of precedence for the permanent observer countries is determined in the same way.

For meetings away from headquarters at which the country's president or prime minister attends the opening or closing session, the meeting chair yields first place to the head of state. The order of precedence for the head table alternates, starting from right to left, facing the participants.

For all meetings, a nameplate bearing the name of the participating country or organization is placed on the table. In exceptional cases where speakers, consultants, or experts are invited in a personal capacity, a nameplate with that person's name should be placed on the table. All other nameplates should state the name of the country or organization participating in the meeting.

PROTOCOL AND SOCIAL ACTIVITIES

For the General Assembly, the OAS Office of Protocol works with the host country's national coordination office to organize a schedule of social events during the Assembly. The Office of Protocol is responsible for the reception hosted by the Secretary General and the Assistant General Secretary, agreement signing ceremonies, invitations, and other services related to protocol and ceremonies. It also verifies the availability of spaces for bilateral meetings with the General Assembly coordinator.

AIRPORT

The host country should set aside one or two windows at the airport for delegations and GS/OAS personnel delegates attending the General Assembly and other OAS meetings.

The airport should have a VIP lounge for heads of delegation and their respective members. The room should be available for those guests upon their arrival and their departure from the country, and is where they are accorded the necessary courtesies.

SECURITY

The host country is exclusively responsible for security services. The GS/OAS will furnish all the information and advisory services that the national authorities deem necessary to facilitate their work. However, it is advisable to inform senior Organization officials about the proposed security measures for each meeting.

MEDICAL SERVICES

At the meeting site, the host country should install a first aid post, preferably staffed by a physician and nursing staff. At a minimum, it should be open to meeting participants and GS/OAS staff during meeting hours.



**John Smith
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VI.

STAFF ROLES AND RESPONSIBILITIES IN MANAGING AND COORDINATING CONFERENCES AND MEETINGS

VI. STAFF ROLES AND RESPONSIBILITIES IN MANAGING AND COORDINATING CONFERENCES AND MEETING¹

CONFERENCE SPECIALIST/COORDINATOR

The conference specialist/meeting coordinator is responsible for organizing, administering, and conducting the conference. Their functions include directing and coordinating the activities of the various sections and staff directly responsible for the services for each meeting.

Their work divides into four distinct stages²:

- Planning and coordination
- Implementation
- Oversight of work during the conference
- Post-conference responsibilities

¹For specific details of protocols for mounting and dismantling, see the Checklist in the Appendixes.

²All of these activities are completed using the Checklist in the Appendixes.

Planning and coordination

They hold meetings with the technical area and host country personnel to determine the meeting's needs; plan, coordinate, and organize matters related to the meeting; and determine the work schedule and plan of action based on the meeting's agenda, schedule, and logistical needs.

Having established the plan of action, the conference specialist/meeting coordinator must then:

1. Draw up an activities schedule with execution dates.
2. Prepare and negotiate with the host country the draft agreement and its appendixes, which should spell out the responsibilities of the host country and the GS/OAS.
3. Prepare a draft budget, which should also be negotiated with the host country.
4. Request the **DCMM** administrative officer or administrative assistant or the Department of Financial Services to open the budget account to handle expenses related to the conference.
5. Hold coordination meetings with the host country's national counterpart, by telephone or videoconference and, if necessary, schedule one or two preliminary trips to discuss and agree on such matters as:
 - venue and space
 - working languages
 - meeting budget and funding
 - logistical details
 - designation of the local coordinating office and sectoral sub-coordinators
 - number of participants
 - protocol
 - accommodation for delegations and GS/OAS staff
 - transportation for delegations and GS/OAS staff
 - local personnel needs
 - supplies and professional audio and video recording equipment
6. Attend to agenda-related logistical matters (PowerPoint presentations, distribution of materials, etc.)
7. Review the final terms of the headquarters agreement to be signed by the host country government and the GS/OAS.
8. Coordinate the signing of the agreement by the OAS Secretary General and the host country government.

9. Prepare the final draft budget and have it validated by the administrative officer.
10. Coordinate with the Office of Protocol on the signing of the Agreement.
11. Coordinate the legal and financial review of the headquarters agreement with the relevant GS/OAS departments.
12. Prepare and submit written reports on any preliminary trips.
13. Coordinate with the Language Section to have GS/OAS and hired personnel (interpreters and translators) assigned to the meeting.
14. Coordinate requests for materials and design of identification badges (purchase orders at headquarters).
15. Prepare a draft information bulletin based on the **DCMM** model, forward it to the host country and, once approved, send it for translation and subsequent distribution. It is only distributed after the host country has deposited its contribution into the OAS account.
16. In the case of the General Assembly, verify hotel reservations for GS/OAS personnel with the national coordination office or hotel coordinator.
17. Follow up on the scheduled deposit of the host country's contribution.
18. Coordinate the electronic dispatch of documents and materials to the host country, as well as the creation of the URL for the meeting and its respective QR.
19. Check that offices for OAS personnel are distributed in a timely manner.
20. Oversee the distribution of office equipment and materials (computers, photocopiers, paper and other office supplies, printing equipment and materials, CDs, and regular and mobile telephones, as authorized by the host country).
21. Verify and oversee the transportation details for GS/OAS personnel and freight, if any.
22. Check the accommodation arrangements of all participants with the GS/OAS coordinator.

During the conference

1. Verify and oversee the distribution of meeting rooms and their equipment (head table arrangements, tables for participants, observers, guests, rapporteur, documents, etc.)
2. In constant coordination with local and GS/OAS technical personnel, check the installation and testing of interpretation equipment, microphones, panels, professional recording equipment, audio, power strips, and lighting.
3. For the General Assembly, after every session (a.m. and p.m.) request a copy and backup of recordings for the plenary, the General Committee, and working groups. During the General Assembly, deliver the recordings log to the **DCMM** Director, as appropriate.
4. Coordinate the details of local transportation for all meeting participants with the host country transportation coordinator.
5. Have precise information about social activities.
6. Ensure that all purchases and payments for services and personnel hired by the GS/OAS for the meeting are made properly and on time.
7. Meet daily with sectoral coordinators, service chiefs, and the technical secretariat to receive progress reports on the meeting's activities.
8. Coordinate the preparation of a local personnel directory.
9. Check daily that all technical aspects are working properly and that verification protocols are conducted unhindered (before and after each meeting).
10. For the General Assembly, after performing the relevant protocols, daily deliver all checklists—signed, with the date and time annotated—to the **DCMM** Director.
11. At the end of each session, check that rooms are set up and ready for the next day.
12. Depending on the budget approved, ensure that the necessary funds are available to pay personnel hired by GS/OAS.
13. Keep track of all expenses incurred during the conference, ensuring that they adhere to pre-established obligations.

After the conference

1. For the General Assembly, coordinate with the freight shipping company to check that all GS/OAS materials and equipment have been dispatched to headquarters.
2. Send the **DCMM** Director a meeting evaluation report.
3. Include all vendor contacts on the **DCMM**'s shared drive (G drive) for future reference.
4. Complete all payments, in coordination with the administrative officer and administrative assistant.
5. Ensure that the meeting assignment and accounts are closed out in the financial system and send the host country's permanent mission a note verbale, through the Office of the Director, reporting the respective balances.
6. If applicable, verify the receipt of freight at headquarters. Request the financial report on the execution of funds and notify the **DCMM** Director of the remaining balance, if any, in order duly to apprise the host country by note verbale and closeout the relevant account.

ADMINISTRATIVE OFFICER

1. Review budget proposals for meetings.
2. Prepare the payroll of hired personnel and make electronic payment.
3. Process payments for unforeseen services and/or materials for the conference.
4. Perform any other necessary budget estimates relating to the conference proceedings.
5. Assist the conference specialist with administrative activities in preparation for the meeting.

REGISTRATION AND ACCREDITATION PERSONNEL

1. Receive accreditation letters and draw up a preliminary list of participants.
2. Check the availability of materials and supplies to be used.
3. Prepare, classify, and organize ID cards for all meeting participants.
4. In registering meeting participants and guests, hand them their ID badges after double-checking their accreditation and/or invitation. For that purpose, they should familiarize themselves with, or have to hand, the rules of procedure for the meeting for any questions that may arise.
5. Check the preliminary list of participants and send it to the relevant persons for approval with a view to the subsequent publication of the final version.

SOUND AND VIDEO TECHNICIAN (UNDER THE SUPERVISION OF, AND IN CONSULTATION WITH, THE CONFERENCE SPECIALIST IN CHARGE)

Pre-meeting activities

1. Confirm with the meeting coordinator the technical needs for all sessions and how the room is to be set up for each session.
2. Check against the equipment list (conference system, interpretation system, professional recording system, audio system, video system, lighting system, etc.) and confirm that every item of equipment needed for the meeting is available.
3. Check with the equipment supply company that the equipment is complete and adequate. Perform a preliminary checklist review.
4. Confirm the dates for setup and handover of the finished room with meeting coordinator.
5. Coordinate the audio equipment needs with webcast personnel.

6. Set up the room, test the equipment, and inspect the relevant checklist, under the supervision of the meeting coordinator.
7. Instruct and coordinate with the audio and recording systems control operator(s) from the contracted firm regarding the procedures for each meeting, and set the work schedule with them.
8. Before every session starts, check with the operators from the contracted firm that the recording equipment is working properly and that everything is ready.
9. Go over the checklist for all technical systems to be used at the meeting.
10. Design room and office floor plans. Where possible, get PowerPoint/CD presentations from the committee secretaries to upload into laptops and test them.

During the meeting

1. Check:
 - A) That the floor audio is recording properly
 - B) Audio volume at different points in the room
 - C) In-room wireless interpretation in the four official languages plus the floor
 - D) That backup wireless microphones are working properly
 - E) In-room video projection
 - F) Webcast audio output
 - G) Unrestricted Wi-Fi access
2. In the event of a problem during the meeting, immediately advise the coordinator in charge of the meeting.
3. Once the room activity is finished for the day, make the necessary adjustments to prepare the room for the next day's sessions.

After the meeting

1. Inform the meeting coordinator that the meeting is over.
2. Check the recordings made by the **DCMM** and ensure that they are loaded on to a laptop or PC hard drive.
3. Uninstall the equipment belonging to the GS/OAS.
4. Stow equipment in their containers and make an inventory.
5. Once GS/OAS personnel are back at headquarters, recordings must be downloaded and compressed on the server and name appropriately. In the case of the General Assembly, equipment coming from the host country should be received and inspected. Any damage or missing items should be reported to the General Assembly coordinator.

WEBCAST TECHNICIAN

Pre-meeting activities

1. Receive technical equipment shipped from headquarters.
2. Install and set up audiovisual encoders on on-site computers.
3. Install and set up all audio and video components for the video editing room.
4. Set up the digital content backup system.
5. Coordinate with local and GS/OAS technology personnel regarding connectivity with headquarters and installing a separate network in video editing room.

During the meeting

1. Record video footage in three different qualities.
2. Monitor audio and video quality levels.
3. Create separate video clips for every segment of meetings.
4. Edit the video before posting.
5. Post the material on the Internet.
6. Make a digital backup in three qualities.
7. Update the oas.org website with links to the digital content posted.
8. Update the official schedule of broadcasts to reflect ongoing, concluded, or upcoming meetings.

After the meeting

1. Detach computer components from local equipment.
2. Pack computer, audio, and video components for return to headquarters.
3. Inventory and package the material.

ROOM ATTENDANT (UNDER THE SUPERVISION OF, AND IN CONSULTATION WITH, THE CONFERENCE SPECIALIST IN CHARGE)

Pre-meeting activities

1. Make coffee, set glasses of water on the head table and around the table where delegates sit.
2. With the meeting coordinator's or the supervisor's authorization, photocopy the Chair's memorandum for distribution to the interpreters.
3. Using the checklist, in coordination with the relevant technician, verify that in-room and recording equipment are installed and working properly.
4. Place the relevant nameplates or signage for participants, according to the order of precedence.
5. Help the meeting coordinator and technical staff with the room arrangement.
6. Arrange tables for observers and the media.
7. Put paper and sharpened pencils (pointing north) at each participant's place.
8. Ensure a sufficient supply of spare paper and pencils.
9. Set desk flags, as necessary.
10. Have a ballot box and the necessary ballots ready for voting.
11. Arrange, clean, and tidy the room before and after every meeting.

During the meeting

1. Pass around the attendance record and note the time that the meeting starts and ends.
2. With the authorization from the committee secretary/coordinator, photocopy specific documents to be distributed to the head table and delegates.
3. Distribute documents to delegates when so authorized by the committee secretary or the meeting coordinator.
4. Place a bell or gavel for the Chair and hold on to it between sessions.
5. Check sufficiently in advance that the documents identified on the document request list and on the order of business are to hand.
6. Collect from the distribution area, sufficiently in advance, the documents indicated on the document request list to give to the technical secretariat.
7. Attend to requests from delegates and the head table.
8. Keep meeting rooms in proper order.

After the meeting

1. Hand the attendance list to the coordinator.
2. Check that the room is clean, arranged, and ready for the next day.
3. As soon as the meeting ends, give the recording chip to the technician in charge of recordings.

CONTROL OPERATOR (UNDER THE SUPERVISION OF, AND IN CONSULTATION WITH, THE CONFERENCE SPECIALIST IN CHARGE)

1. Manage the sound and recording equipment for assigned meetings as well as floor request equipment, including the recording chip at all stages.
2. Check that the order of precedence and spelling of names are correct on the screen accessed by delegates, and label all recordings according to the order of business presented.
3. Should there be any discrepancy or if any of the above equipment malfunctions, notify the coordinator at once.

SYSTEMS SPECIALIST (UNDER THE SUPERVISION OF, AND IN CONSULTATION WITH, THE CONFERENCE SPECIALIST IN CHARGE)

1. Determine, jointly with the meeting coordinator, the necessary specifications for the equipment to be used at meetings.
2. Determine the appropriate settings for the servers, computers, printers, and everything relating to the computer systems and the document processing system (IDMS).
3. Establish the procedures for electronic delivery of documents from headquarters to the host country and, internally, request activation of the relevant ports for those transmissions.
4. Coordinate in the host country or from headquarters the installation of equipment, software, and settings for computers for meetings (for example, IDMS, word processors, CAT tools, antivirus, dictionaries, keyboards, Internet, and email accounts) and provide the necessary support.
5. Design distribution, equipment placement, and network wiring plans. Coordinate with host country on the installation and configuration of the network server, according to the needs of each area.
6. Perform backups during the meeting. Collect and incorporate information from the meeting into headquarters IDMS system.

LANGUAGE SECTION

CHIEF AND COORDINATORS

1. Identify the translators and interpreters to be assigned to work at a meeting based on its linguistic needs.
2. Assign or hire translators and interpreters for a meeting based on their language combinations and their knowledge and experience of the topics addressed at OAS meetings.
3. Assign meeting documents for translation to in-house or external translators via the IDMS or by e-mail, and provide them with all the relevant information.
4. Draw up and implement schedules for translators and interpreters assigned to meetings and update them, as necessary.
5. Examine all documents received for translation to determine their word count, deadline, content, and language, in order to assign them as efficiently as possible.
6. Request any missing information and reference documents from the translation request originating offices.
7. Send translators/reviewers documents to be translated or reviewed via the IDMS, taking into account the delivery deadline indicated in the instructions.
8. Send translations done by external translators either to document processors or directly to the translation requester via the IDMS and, if necessary, by e-mail to other relevant persons.
9. Make a backup of all original and master documents in the system, so that they are accessible to other members of the language team.
10. Act as the point of contact for all matters, problems, and requests relating to translation and interpretation services for a meeting.
11. Keep in constant contact with conference specialists, committee secretaries, and meeting organizers in order to assist them with their requests and needs in relation to language services for a meeting.

12. Advise member state representatives on style committees regarding linguistic matters, official terminology, grammar and style, as requested.
13. Act as a consultant to other translators both within and outside the section to assist them with their translations, and conduct linguistic research activities when necessary.
14. Provide information about rates and quotes for translation, interpretation, and other language services, as necessary.
15. Assist, review and provide professional and technical advice on the preparation of OAS specialized glossaries, terminology documents, and references guidelines, among other important documents.
16. Respond to inquiries about the status of translation requests from other offices, which entails follow-up with in-house and external translators.
17. Compile, review, and funnel all invoices submitted by external translators and interpreters to the originating areas, as necessary.

TRANSLATOR/REVIEWER

1. Receive from document coordination documents to be translated or reviewed via the IDMS, taking into account the delivery deadline indicated in the instructions.
2. Revise translations done by other translators and translate and self-revise documents to be used in meetings.
3. Clarify any doubts about translated texts or instructions in documents.
4. Send translated or revised documents to the document processor or language coordination by email or via the IDMS.
5. Act as a consultant to other translators to assist them with their translations, and conduct linguistic research activities when necessary.
6. Assist, review and provide professional and technical advice on the preparation of OAS specialized glossaries, terminology documents, and references guidelines.

7. Edit and review minutes of the meetings of the Permanent Council and its committees.
8. Advise member state representatives on style committees regarding linguistic matters, official terminology, grammar and style, as requested.

PROOFREADER

1. Receive translated documents from the translator/reviewer or language coordination via the IDMS.
2. Review the instructions.
3. Format the document according to the guidelines and criteria contained in A Guide for OAS Proofreaders.
4. Thoroughly review the document, checking it against the original language, including quotations and figures.
5. Send the document for final distribution to member states, permanent observers, and relevant areas of the General Secretariat; and as appropriate, to the requester via the IDMS; in addition, if necessary, send by e-mail to other relevant persons.
6. Resolve any formatting or style issues raised by the translator.

DOCUMENTS SECTION SUPERVISOR

1. Receive from the Secretariat of the Permanent Council and of the General Assembly or other technical secretariats the original copy of documents for printing, along with the production and distribution instructions.
2. Prepare the cost estimate for the reproduction and printing service.
3. Record the date and time of receipt of the document for production and distribution.

4. Print documents according to the instructions received.
5. If received, return the original hard copy to document coordination.
6. Contact document coordination about any doubts with printing the document.
7. Keep a strict tally of all copies made from beginning to end of sessions, and submit that information to the meeting coordinator.
8. Immediately inform all parties concerned of the delivery of documents for meetings.

Appendix

APPENDIX

Checklist

<http://scm.oas.org/DOCS/DCMM00124E04.xlsx>

Model General Assembly Agreement

<http://scm.oas.org/DOCS/DCMM00121E08.doc>

Model Letter of Understanding for Meetings away from Headquarters

<http://scm.oas.org/DOCS/DCMM00123E12.doc>

Model Information Bulletin for Delegates

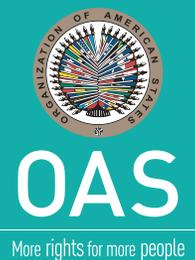
<http://scm.oas.org/DOCS/DCMM00122E05.doc>

Model Registration Forms for Recordings

<http://scm.oas.org/DOCS/DCMM00120E05.docx>

Model Draft Budget

<http://scm.oas.org/DOCS/ModelDraftBudget.xls>



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