

TECHNICAL REPORT OF THE 3RD PARTNERS FORUM, RIO DE JANEIRO, BRAZIL 23-25 MARCH 2009

1. Background & Preparation

This is a brief technical report about the 3rd Partners' Forum organization and execution compiled by the Forum Steering Committee and Partnership Secretariat staff involved in preparing the Forum. It is designed to be a documentation of lessons learned for use by the Stop TB Partnership Coordinating Board, the Partnership Secretariat and partners organizing similar Fora in the future. It is the intention of this report to document objectively, to the extent possible, what worked and what did not in planning and execution of the Forum for the benefit of future planners, as well as participants.

In addition to Secretariat staff responsible for organizing the Forum, global and local steering committees were established to oversee the process. A project manager within the Partnership Secretariat in Geneva served as focal-point for Forum-related matters and a local focal point in Rio provided liaison services with national and local authorities. At the outset, it should be noted that a positive team spirit contributed greatly to the organization and realization of the Forum.

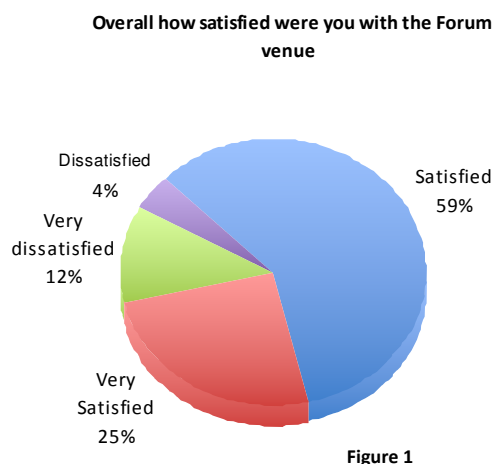
Following the Forum, a survey was conducted of Forum participants, with 72 responses received. These responses are used throughout this report to get a better understanding of how participants at the Forum evaluated different aspects of its organization and content.

1.1. The Selection of the Venue

The host city was selected through a open bidding process by member states and partner agencies. The process was managed by a "Host City" Selection Committee that screened submissions according to pre-established criteria (including expressions of support from host authorities) to support equal opportunities to potential host cities. Based on the Selection Committee's recommendation, the Stop TB Partnership Coordinating Board chose Rio de Janeiro, Brazil to host the Forum. The bidding process is considered to have worked well as it generated interest and commitment in the host city prior to the Forum. This process should be replicated for future Fora.

Brazilian authorities were officially informed of the outcome in January 2008, approximately 15 months prior to the Forum. The Federal Government of Brazil offered and paid for a conference facility, Rio Cidade Nova Sul-America Convention Centre, located in downtown Rio¹ to serve as the venue.

For future planning, a clear understanding of expectations, in particular regarding the level and extent of support to be provided by the host city/government and division of responsibilities, should be established. While, in Brazil, the government was responsive and generous, however the Secretariat did incur some unexpected costs, notably portions of the convention center's electricity and insurance bills. Moreover there were unanticipated arrangements the Secretariat made for VIP support. As a part of future planning, the host country should be advised to notify all



¹ Some Partners have suggested that the reason some sessions were not as well attended as expected can be put down to the fact that the venue was not within walking distance of the majority of hotels where participants stayed.

resident Embassies about the Forum with the expectation that this will facilitate timely issuance of participant visas .

It should be noted that the venue was large relative to the number of participants anticipated and present. Based upon available information, a realistic assessment of the number of participants should form an integral part of the call for bids and should be kept in mind when reviewing bids.

Figure 1 contains responses from the Survey conducted by the Partnership Secretariat on participant satisfaction with the Venue.

1.2. Agenda Setting

The agenda was created in an innovative, interactive and consultative manner. A blog was set up and partners debated months in advance possible themes to be discussed at the Forum. This was done not only to involve Partners, but also to ensure the relevance and responsiveness of the Forum's content to the work of partners.

With this input, the Steering Committee developed a draft agenda that was presented to the Coordinating Board for approval. Once the outline of the agenda was approved, the topics for the Thematic Tracks and Speaker's Corner were posted online calling for proposals from partners, with the best and most relevant proposals selected by the Steering Committee.

The plenary sessions were organized by the Secretariat with the advice of the Steering Committee. Constituency Meetings were organized by the respective constituencies.

1.3. Design and Branding

A dedicated website was created for the Partners Forum. Through this website, the Secretariat communicated with partners about issues regarding the organization, involvement, updates and post-forum developments

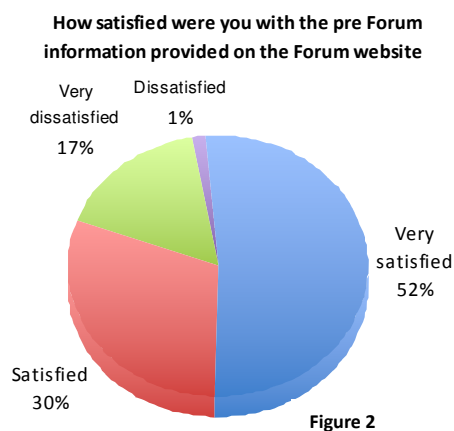
(http://www.stoptb.org/events/partners_forum/2009/). According to survey responses, **figure 2** indicates that 82% were either satisfied or very satisfied with the information available on the website. While satisfaction levels are important, in the future, it would also be useful to know how many participants actually accessed and used the website as well. On the same

subject, while the website was useful, some partners have indicated that in the future it would be good to send out announcements and notices to all partners through other means as well.

Branding was also carried over into conference material products, including the conference bag, t-shirt, pens, papers, and lanyard/badges that were provided to each participant

1.4. Securing the Services of an Event Management Agency

The process of selecting an Event Manger was initiated in late 2008, with a Request for Proposals posted on the Forum website. Due to the fact that only one bid was received in response to the RFP, a rebid was issued, delaying award of the contract. After internal review and clearance in accordance



with WHO administrative rules and procedures, Regency Congressos & Eventos was selected among three event management companies.

The RFP process encountered delays for a number of reasons. Development of the RFP required consultation and inputs from a wide range of actors, including the Secretariat, WHO and the host Government. Prior to developing similar RFPs, the Secretariat should remain mindful of local conference norms in the hosting country. An ambitious and demanding RFP may not be achievable. Therefore, the RFP should aim to be, realistic and achievable and, to the extent possible, adapted to the hosting country.

It is also recommended that in the future if a similar process is to be used, the RFP process be initiated 6-8 months in advance of the event.

1.5. Transportation

Airport transfers were undertaken by a sub-contractor to the Event Manager in Rio as per the RFP. All participants were requested to complete airport transfer forms in February 2009. Regarding transportation, coordination between the event manager and subcontractor was at times ineffective and language proved to be a significant barrier between participants and subcontractor. Airport transfers, therefore, proved difficult.

In the future, organizers should only consider transfer arrangements for a limited number of high level participants, or to ensure that airport transfer costs are included in per diems, as well as detailed and timely information with regard to travel to and from the airport.

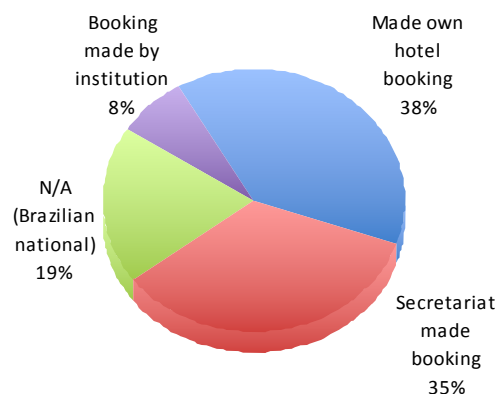
1.6. Hotels

A reputable hotel group (Windsor) in Rio de Janeiro was contacted for accommodation of Forum participants. Block booking and discounted rates were negotiated with Windsor Hotel Group. Following consultations with the Secretariat and Windsor, OPCO travel and tours was requested to manage reservations for participants.

The following link was attached to the Partners Forum Web site for reservations:
<http://www.opcotours.com/events/stop/index.htm>

Based on survey results, 55% of respondents did not use the online hotel reservation process. Figure 3 provides sheds light on why the online hotel reservation site was not used more.

Figure 3
If you did not use the online reservation process why not



1.7. Travel Bursary Management Agency & Sponsored Participants

In early 2009, at the time the Forum was being organized, WHO was in the process of changing travel agents. In order to ensure smooth engagement and participation of community activists and Ministers of Health/NTP managers from high burden countries, the Secretariat decided to engage a Bursary Management Agency to provide bursary services for sponsored participants. For this purpose, an RFP was posted on the Forum website in December 2008. OPCO travel and tours in Rio de Janeiro, Brazil, was selected and contracted.

The process of selecting and awarding a contract was complicated by a lack of the requisite number of bids to have a comparative and competitive process. This delayed issuance of the final contract, which in turn led to delayed issuance of tickets and visa letters and led to a number of participants being unable to acquire visas, including transit visas, before the Forum. Although itineraries were sent one month before travel, this was not enough time for a number of participants travelling from Africa and Asia.

As a result, if travel bursary is to be undertaken again at this scale (100 in total funded by the Secretariat; approximately 75 trips arranged and managed by OPCO and approximately 25 arranged and managed by the Secretariat, that latter of which pertained to Ministers and NTP Managers from HBCs) and it is to be contracted out, the RFP should be posted up to six months before the event. This should allow for itineraries to be sent to sponsored participants at least two months before the event to allow for visa (s) application and processing. Moreover, the costs of visas should be included in per diems if they are not waived.

Applying for a scholarship/sponsorship to attend the conference should be done at the same time as registration, in one step. It was very confusing for some, and a number of people sent an email but never received the scholarship application. Those participants who successfully apply for sponsorship should be required to confirm attendance and that they have all visas to the Secretariat at least 10 days before travel and be required to provide any changes in their travel plans. Penalties for non-compliance should be considered; to remain sensitive to communities, these could take a form other than financial penalties, such as barring them from receiving travel sponsorship to the next Forum, or other similar events where Partnership support is available. This would allow the Secretariat to cancel bookings in a timely fashion; if the notification from sponsored participants comes early enough, it may also allow the Secretariat to extend travel sponsorship to others requesting this support.

The Partnership will be reimbursed for the cost of unused ticket (minus penalty-fee) and for no-show participants from AMEX/WHO travel agency. With OPCO, the Secretariat lost completely on no-show tickets; although there was a cancellation clause in the contract with OPCO, sponsored participants rarely informed the Secretariat that they would not travel. These participants were considered no-shows; since the tickets were not cancelled, it is not possible to reclaim any portion of the funds committed.

1.8. Assessment Mission to host country

An assessment mission to Brazil was undertaken in January 2009 to discuss and reaffirm high level political support for the Forum, its program and its objectives; while in Brazil, the mission met with the WHO office and the Government of Brazil/Federal Department of Health. Additional planning meetings were held with the event manager and other service providers in Rio de Janeiro. The assessment mission resulted in renewed energy and commitment by the three levels of government in finalizing all arrangements for the Forum and associated events in Rio de Janeiro and in that respect can be deemed of high value to the organization and execution of such a large-scale event.

1.9. Final Preparation

One week before the Forum, the project manager and 2 Secretariat staff travelled to Rio for final coordination of all plans and arrangements. In hindsight, this measure was appropriate.

Meetings were held with the local organizing committee, authorities and contractors to review final arrangements, as well as with the Office of the Municipal Health Secretary to discuss the World TB Day reception at the residence of the Mayor of Rio de Janeiro; this differed from original plans (the reception was to take place at the convention center) and underscores the need for flexibility in planning a large scale event.

2. THE FORUM

Two days before the event, Secretariat staff were requested to assist with setting-up at the convention centre. Specific terms of reference (TOR) were given to each staff member spelling out exact responsibilities to enhance coordination and avoid duplication. All Secretariat staff also provided contact details which proved useful as well (email, mobile phone and hotel).

On-Site Registration (please see **Figure 4** to view satisfaction levels with regard to the registration process) of participants started one day before the beginning of the Forum. Badges for participants were colour-coded (VIP, VIP entourage, Staff, Press, Service, Market Place, Participants). There were not enough VIP badges due to the fact that members of the VIP's entourage were not factored in. Additionally, Forum materials including programme, note-pad, pen, t-shirt, lanyard, conference bag, metro pass and map were distributed at the registration counter. A first aid clinic was set-up and managed by the Municipal Health department.

2.1. Attendance

About 1800 people registered on the Forum's website.

Information provided by the event manager (Regency) on actual attendance is as follows:

- i. Approximately 1200 people participated in the Forum. This was a mixture of participants (933), VIP plus entourage badge holders (100), media (60), auxiliary and supporting (market place, Regency staff, Queen Bee staff) staff (50) and officials from the state, municipal and federal authorities (45).
- ii. 52% of the conference participants were Brazilians and 48% were international participants.

Registration was free and easily completed online. The registration deadline was January 31, 2009. Only 52% of the people who registered actually attended the Forum. Possible reasons for this drop off may be: 1) that registration was free (therefore there was no financial risk in registering even if a participant was not certain they would attend); 2) registration officially closed at the end of January thus its possible that persons who were not sure they would be able to attend registered anyway; 3) some participants who registered may not have been able to secure a visa and/or financial support to attend. Although registration should be easy and accessible to all, it may be advisable that some minimal payment or reconfirmation exercise take place to enable more accurate planning on participant attendance; however, care must be taken to ensure that this does not act to limit community participation.

Figure 4

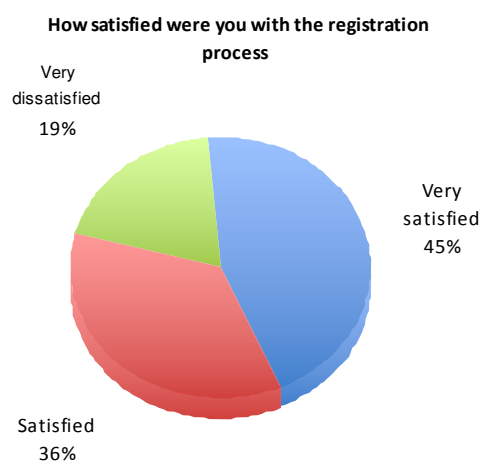
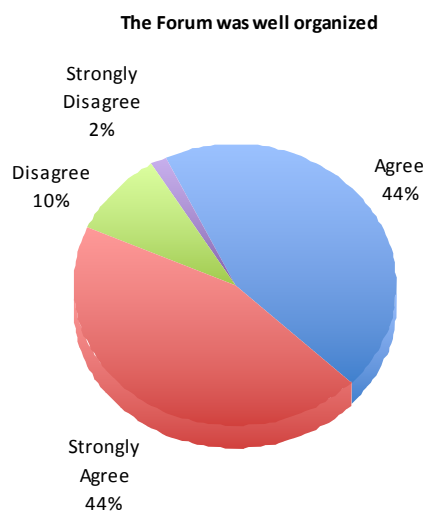


Figure 5



2.2. Market Place

The Secretariat offered free booths to all partners who requested exhibition space at the Market Place. Partners were notified by email about their stand location, and were also given practical information on shipment of materials to Brazil.

About 30% of partners who were offered booths did not show-up, most often as a result of complicated clearance procedures at the airports in Rio de Janeiro and Sao Paulo. This problem was taken up with the Federal Ministry of Health of Brazil. For future Forums, the Secretariat should consider this issue as important and relevant to the success of the Forum's Market Place from the onset of negotiations with the hosting government and request clear guidance on streamlined processes (e.g., waiver for customs duty) for Partners. Unfortunately, information provided by the Federal Department of Health of Brazil regarding duty-free privileges for partners was not respected by Custom officials at the port of entry. This points to the need for further follow-up to ensure that guidance is provided across levels of government to support, to the extent possible, expedited processes for Partners.

2.3. Speaker's Corner

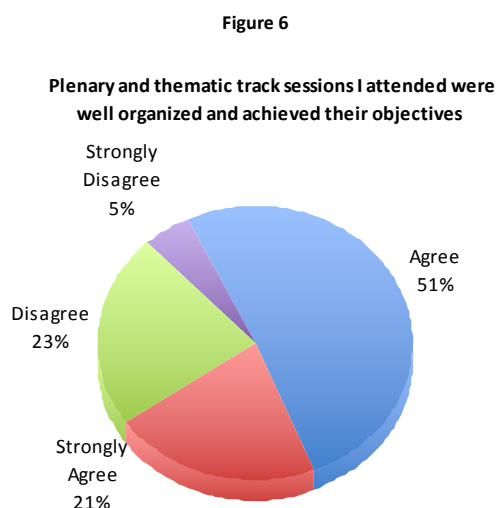
Over 250 participants registered on the Forum website for this activity during lunch time. Less than 10% participated as planned. This was a result of overlapping activities at lunch including networking in the cafeteria, TB related movies on the 2nd floor, participants visiting the Market Place, and so forth. However, a number of partners did take advantage of the open microphone in the Market Place to discuss issues of importance to them.

Given the experience at the 3rd Partners Forum, the open microphone approach was welcomed by Partners and should be replicated in future Forums.

2.4. Thematic Tracks Sessions

Once the agenda outline was approved by the Coordinating Board, the topics for the thematic tracks were posted online and a call for proposals launched. In total, 89 potential thematic tracks were proposed. The Steering Committee approved as many thematic tracks as possible and partners were informed if their proposals were included in the agenda. In the end, 33 thematic tracks were organized.

Because approximately 50% of registered participants attended the Forum, not all thematic tracks were well attended. In retrospect, it can be argued that 33 thematic tracks may have been too many. While the 3rd Forum attempted through a



variety of ways and means to engage and cater to the requests of Partners, combining thematic tracks where possible, and reducing their overall number while minimizing overlapping sessions may be recommended for the organization of future Forums to ensure better attendance.

Additionally, for future Forums, organizers of thematic tracks should be advised that they cannot assume all expected participants will be in attendance and that it is incumbent upon them to be proactive given what may be a variety of competing meetings concomitantly scheduled; in this light, organizers should be advised to advertise, through flyers, posters or other means their thematic tracks to ensure the widest possible attendance.

The directions for submissions were unclear as a number of applicants submitted abstracts not panels. Additionally, applicants should indicate how they will be attending the meeting, as a number of them had no support to attend and it was unclear whether they expected the Partnership to support their attendance

As seen through **Figure 6**, 71% of respondents found the thematic track sessions they attended achieved their objectives and were well organized.

2.5. Skills-Building Workshop

Based on interests expressed by participants via web registrations, workshops were organized on 22nd March, one day before the start of the Forum. About 20% of those participants that registered for the workshops turned up; however, 80% of survey responses found the topics of the skills building sessions to be applicable to their area of work.

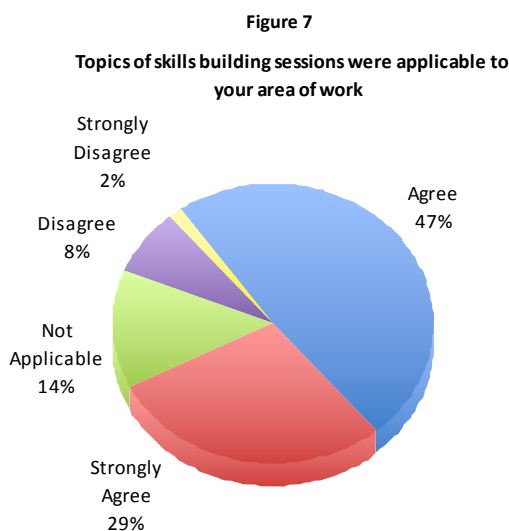
Despite the high level of utility and relevance to participants, future planning may wish to consider the feasibility of staging events prior to the Forum when many participants may likely be in transit. If significant pre-Forum events are deemed to be a priority, organizers of workshops should be provided a list of those participants who have registered in order to follow up and reconfirm attendance. Alternatively, a potentially smaller number of skills building workshops not occurring simultaneously could be organized during the Forum itself with assistance from partner organizations.

It should also be taken into consideration that pre- and post-Forum events will have a material budgetary implication in the form of an increase in per diem costs for those participants sponsored by the Partnership.

2.6. Satellite and Special Events

It was planned to have satellite events daily between 7-9am, and after 6pm. Eventually, all satellite events took place after 6pm.

The Exhibition "Arts to Stop TB" was featured at the *Galeria do Convento - Universidade Candido Mendes*. The photography exhibition "Images to Stop TB" was shown at 3 venues at the same time: the convention centre, a cultural centre and a favela in Rio. J. Nachtwey's photography exhibition on XDR-TB was planned to show at the convention centre but the images were not cleared by customs



on time. The documentary "Finding Dr Schatz" was shown during lunch time, however, due to multiple activities during lunch break only few people attended. For more information, please also see the Rio Images to Stop TB report.

2.7. Site Visits

The Federal, State and Municipal Departments of Health offered 11 TB site visits to registered participants. Over 300 participants registered for this and about 20 additional were placed on a waiting list. On 26 March, only about 20% of registered participants actually showed up. This again points to a need to reconfirm with all participants prior to the date; alternatively, offering a few, select site visits during the course of the Forum may also be a way to maximize participation, or to provide financial support for participants to stay one extra day.

2.8. Post-Forum Activities

The Secretariat sent out thank you letters to the President and government officials in Brazil, Ministers of Health and NTP managers from high TB burden countries, Heads of Agencies, Steering Committee, and conference service providers.

The 85 Rio Recommendations produced by partners during Forum sessions were placed on the Partners' Forum website for commentary until the end of April, allowing one month for Partners to comment, amend and refine recommendations produced at the Forum. At its 24th teleconference, the Executive Committee of the Coordinating Board requested that the Secretariat prepare the Partnership response to the 85 recommendations produced at Rio, including a synthesis with prioritized next steps and decisions to be forwarded to the Steering Committee, Executive Committee and the Coordinating Board for consideration and implementation, as appropriate.

In addition, a survey was prepared and sent to participants, the results of which have been featured in this report. Response to the survey was low; planning for future forums should consider various approaches to gather more feedback and evaluate the forum. This may potentially take the form of administering a similar survey during the final day of the Forum through either paper means and/or via an online format accessible at the internet stations set up around the forum space. Taking advantage of the captive audience at the Forum should assist in boosting the response rate next time.

3. CONCLUSION

The 3rd Partners Forum represented the largest gathering to date of Partners engaged in stopping tuberculosis. In that respect alone it was a significant accomplishment. Moreover, nearly 85% of respondents were satisfied with the organization of the Forum (**Figure 5**).

From the assessment contained in this report, and the responses received by Forum participants, the experience and perception of the Forum was by and large positive, with the vast majority of survey respondents finding the Forum's objectives clear and achieved (**Figure 8**).

The overall Forum objectives were clear

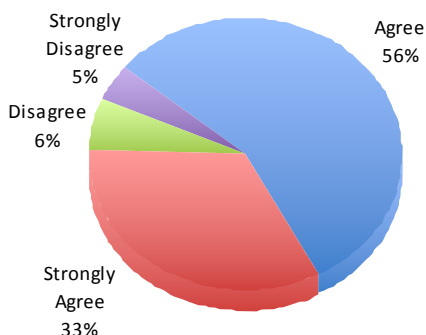


Figure 8

The objectives of the Forum were achieved

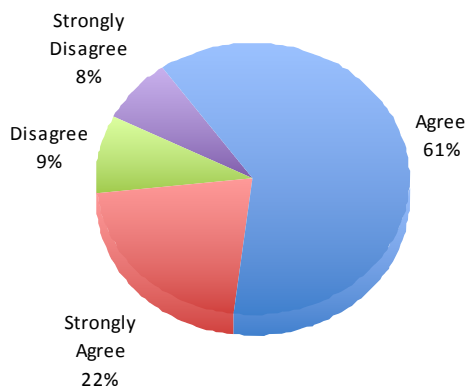
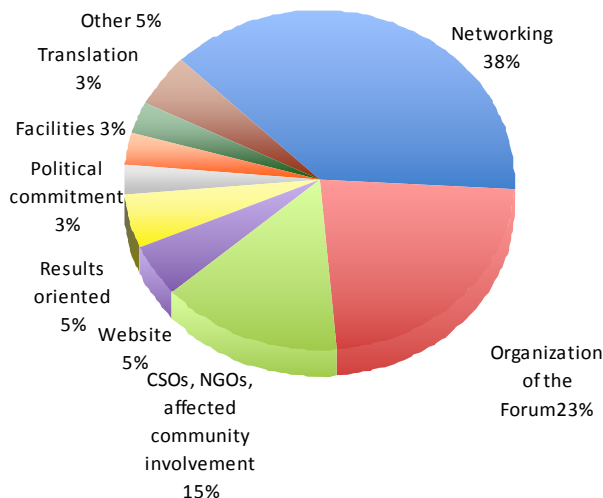


Figure 9

What did you like most about the Forum

When asked what participants liked most about the Forum (Figure 9), 38% responded with "networking", 23% its organization and 15% the participation of CSOs, NGOs and affected communities. Clearly, the Forum presented a unique opportunity for members of the TB community to come together and network. When asked how the Forum was relevant to their areas of work, nearly 55% responded that the Forum had increased their knowledge of TB, nearly 20% responded with "networking" and a further 10% responded with knowledge sharing.



When reviewing the three primary roles the Forum is intended to serve according to the Basic Framework of the Partnership² the conclusions of this report indicate that it accomplished all three, with perhaps the most relevant one, based upon participant responses, appearing to be to: "Serve as a forum of information exchange on progress, problems and challenges in relation to the work of the Stop TB Partnership."

Although few respondents included another of the Forum's roles: "Review and comment on the overall progress of the Stop TB Partnership", this was a major plenary session on the morning of the first day focusing on this; a draft Progress Report was released at the Forum; and Partners prepared more than 80 recommendations that often directly reviewed and commented on progress and suggested ways forward that will help guide the work of the Partnership over the coming years.

² http://www.stoptb.org/stop_tb_initiative/assets/documents/STBBasicFramework.pdf

Moreover, the Forum's role to "consolidate and increase support for and commitment to the work of the Stop TB Partnership" was extremely important at all levels of the Forum, including at the political level. The Forum offered the opportunity for Coordinating Board Members to engage with Ministers of Health and Ministerial delegations from Thailand, Bangladesh, the Democratic Republic of the Congo, Zimbabwe, Uganda, Afghanistan, Pakistan, Kenya and Brazil, as well as the Executive Directors of UNAIDS, the Global Fund.

The Forum was also significant in terms of concrete outcomes, such as the 85 Rio Recommendations produced by Partners at the Forum, the Recommendations Synthesis prepared for the Coordinating Board, the Rapporteur's Report on the content of major Forum sessions, and this Technical Report focusing on lessons learned in the planning and execution of the Forum.

In addition to the many positive and innovative aspects of the 3rd Partners Form, this report has tried to highlight a number of areas where improvements may be possible and planning and execution may be further optimized for future Forums, or events of similar size. **Box 1** summarizes participant views on how the forum could be improved.

The timing of the Forum in March led to much of the planning and organizing, particularly the agenda and track selection and travel arrangements occurring in late December through January, a time of year when many people were on holiday. This left a smaller number of partners to follow through on a number of tasks and complicated the coordination of activists who were being sponsored to attend.

In general, survey responses indicate that pre and post-Forum events were not as well attended as planning would have indicated and may need to be reconsidered for future events. This was not due to lack of interest, but often a result of travel plans which precluded attendance. This indicates that, to the extent possible, integration of these or other events into the actual Forum could have boosted attendance considerably. However, overlapping too many events with one another, and particularly at lunch time (such as the scheduling of Speaker's Corner or film showings) can be expected to reduce attendance. As stated above, pre- and post-Forum events will have a material budgetary implication in the form of increased per diem costs for sponsored participants.

Furthermore on travel and accommodation, most participants did not use the online booking in favour of making hotel bookings themselves. In the future, the Partnership should reconsider offering this service to participants. Additionally, the location of the host country in relation to high burden countries, and difficulties in receiving visas (including transit visas) and clearance of materials through customs complicated participation for a number of Partners. While there may be no perfect venue that will be free of these complications, to the extent possible these problems should be mitigated and may form a section for potential host country bidding for the next Forum to address.

The website and build up generated significant interest, but unfortunately only 50% of registered participants were able to attend the Forum. This had a number of consequences. Demand for events, like Skills Building, Thematic Tracks, Speakers Corner and others, was distorted by the fact that half of Partners expressing interest in utilizing these events were unfortunately unable to make it to Rio, were in transit, or were engaged in competing, parallel events.

These points argue for the need to strike a balance between openness and some form of control. Registration was open and the website engaged partners in the planning and content of the Forum;

BOX 1. In what ways could the Forum be improved?

- Reduce thematic tracks to improve attendance
- Next Forum should be in a more centrally located country to facilitate attendance of participants from HBC.
- Select a country with less visa restrictions to make it possible for more to attend
- Arrange a meeting of Policy makers and TB/HIV experts
- Incorporate other methodologies to show TB control efforts, ie, expositions by vulnerable communities, theatre, music, dance and film.
- Add a session on successful programs and challenges faced by NTP managers to achieving MDG.
- Send participants key documents on issues to be discussed.
- Involve participants in the organization of the Forum
- Target grassroots based NGOs and CBOs working on TB to attend next Forum
- More Internet connections
- Install screens in reception for displaying information about sessions
- Translate all sessions in the 3 languages
- Invite more to attend
- Increase Forum days
- Use bilingual volunteers
- Provide more platforms for community representatives to participate

however, in the future, there may be a need for greater controls or limits on proliferation and overlaying of Forum content, as well as greater limits on how many meetings or events participants can reasonably sign up for. The intention is not to preclude participation from any Partner in any way. The 3rd Partners Forum was largely demand driven and is a tribute to the diversity, richness and engagement of Partners, but the ease of online registration and sign up distorted actual demand for the workshops and meetings which were, in effect, over-supplied at the Forum.

This may point to the need for some minimal barriers to entry in who can participate in recommending content for the Forum and signing up for its sessions. While it will ultimately be up to the organizers and overseers of the next Forum to decide what form those barriers, if any, take, they may take the form of a small registration fee or confirmation of plane and/or hotel bookings as a prerequisite for signing up for events. This would provide a more accurate picture of how many participants can be expected and should achieve something closer to equilibrium between those who will attend the Forum and what the Forum will offer them.