
Visit Guidelines

Administrative guidelines for country visits of syndromic surveillance systems in Europe

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Work Package 5

Deliverable 2 - Part 1



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1. Introduction

The Public Health Action Programme Triple-S-AGE (Syndromic Surveillance Survey, Assessment towards Guidelines for Europe, Grant Agreement No. 20091112) will review European syndromic surveillance systems. Co-financed by the European Commission through the Executive Agency for Health and Consumers, the project encompasses an inventory of existing and proposed syndromic surveillance systems across the European Union (EU). Knowledge exchange between member states interested to setup or improve syndromic surveillance systems will complement the inventory through visits of syndromic surveillance systems in different EU countries. The final aim is to establish guidelines to implement syndromic surveillance systems in Europe.

As part of Work Package (WP) 5, eight country visits of syndromic surveillance systems in EU member states for project partners and external participants are organised between June 2011 and June 2012. The purpose of these site visits is to facilitate knowledge exchange between representatives of existing, pilot, planned or expired syndromic surveillance systems in Europe who are interested to setup, improve or re-establish a syndromic surveillance system. During the visits, strengths and weaknesses of syndromic surveillance systems, good practices, experiences and lessons learnt, and the importance of different determinants of syndromic surveillance shall be discussed. The information obtained during the site visits also provides the basis for developing guidelines for implementing syndromic surveillance systems in Europe in the future (one main objective of the Triple S project). The site visits are not for assessing or evaluating the visited systems but for mutual learning and improving syndromic surveillance in Europe.

The site visits are coordinated by the leaders of WP 5, Alexandra Ziemann and Thomas Krafft, Maastricht University (formerly GEOMED Research). Alexandra Ziemann functions as central contact point for all questions regarding the site visits. A special email address is established for all requests regarding the site visits: **visits@syndromicsurveillance.eu**.

The organisation of the site visits shall meet the following objectives:

- Visits are for knowledge exchange of visitors and visited sites, each side shall formulate specific interests towards the other side, and enough time shall be allotted for both sides to ask questions and for discussions.
- Visits shall help to acquire knowledge on syndromic surveillance systems that are not published, i.e. experiences, lessons learnt, etc.; this knowledge feeds into the development of guidelines for setting up syndromic surveillance systems in EU member states.
- Visits shall be conducted in a rather informal and interactive environment including short presentations, group discussions, visits to data providers or interactive presentations of syndromic surveillance systems, and informal events.
- Time shall be allotted during the visit for the visiting group to prepare, compile/manage and process the information gathered.

- Local/regional/national stakeholders (e.g., data provider, policy representatives) shall be invited to site visits and take part in discussions to allow a broad discussion from different perspectives.
- Other syndromic surveillance system representatives could be invited to come to one place to maximize discussion time – otherwise the visit can be enhanced to visit other syndromic surveillance sites in the same country.
- Acquired knowledge will be collated by the rapporteurs for the country reports and as basis for development of guidelines.
- The site visit shall be structured following the “Scientific guidelines for knowledge exchange on syndromic surveillance in Europe” (part 2 of the visit guidelines).

2. Objectives of the administrative guidelines

The administrative guidelines aim at supporting the team at the visited sites to organise a visit but also to provide the visitors with information on the visit outline and logistics. It also formulates expectations and defines tasks of the WP5 team, visitors and visited sites.

This document forms together with the “Scientific guidelines for knowledge exchange on Syndromic surveillance in Europe” Deliverable 2 of the project prepared by WP5 at month 6 (February 2011) of the project, allowing the organisation of the first site visits in summer 2011. Nevertheless, it might be completed and adjusted after the experiences of the first two site visits.

3. Supporting Documents

The following complementary documents will be produced for the site visits:

- **Scientific guidelines for knowledge exchange on syndromic surveillance in Europe** aims at structuring the knowledge exchange process regarding the visited syndromic surveillance systems. It supports the visited teams to prepare the site visit and the visiting team in retrieving relevant and comparable information on visited syndromic surveillance systems focusing on experiences and lessons learnt. The collected information will provide the basis for writing the country reports and for developing guidelines such as the Guidelines for Assessment of Data Sources. They are compiled by the WP 5 leader and might be adjusted to the experiences gained during the first two site visits. The guidelines form together with the visit guidelines Deliverable 2. The guidelines will be publicly available.
- **Leaflet on Country Visits** is prepared for two target groups: for potential external participants as information on the visits and as invitation for expression of interest and for stakeholders in the visited countries as specific information on the purpose of the visit and the involvement of these stakeholders. The leaflet is prepared and regularly by the WP 5 leader and will be available for download from the project's website. They are provided to the organisation team in the visited countries, too.
- **Briefing Documents** are prepared before each visit and are distributed before and/or during the site visits in order to provide information on the visit and the visited syndromic surveillance systems for the visitors. The documents also support the visited site in providing relevant information on the project and the objectives of the visit for the invited stakeholders. The documents are compiled by the WP 5 leader and contain the agenda, logistical information, the list of participants, short CVs of visitors and organising team, information on the syndromic surveillance systems in the visited country including additional material or publications, key points of interests formulated by visitors, the Visit Guidelines, and for the groups at the visited sites information on the Triple S project such as the project and country visit leaflets. Further, a form for evaluation of the visit and a reimbursement form are included. The presentations can be handed out on site as print-out.
- **Site Visit Minutes** are prepared by the rapporteurs after each visit that recapitulate the main findings of the visits.
- **Report of Country Visits** are one main output of WP5 (Deliverable 3) and contain a detailed description of the visited syndromic surveillance systems. The reports are prepared by the rapporteurs in collaboration with the respective visited sites until month 28 of the project and will be publicly available. The reports are one basis for the development of guidelines for implementing syndromic surveillance systems in EU member states.

4. People & Tasks

The site visits are of interest to all project partners (associated partners, collaborating partners, advisory board) and also to institutions from other member states who are not represented in the Triple-S project. During the site visits, roles and main tasks will be shared between the WP5 members, the visitors and the visited sites in the following way:

4.1 Work Package 5

The WP 5 team consists of **all associated and collaborating partners** and is led by Maastricht University (Thomas Krafft, Alexandra Ziemann). The WP 5 leader is responsible for the following **tasks**:

- Central contact point for all request related to site visits or WP 5 tasks
- Coordination of site visit organisation
- Coordination of visiting team composition
- Organisation and moderation of conference calls regarding the organisation of the visits
- Compilation of short CVs and specific interests from the visiting team and organisation team
- Compilation of Briefing Documents before each visit
- Rapporteur during site visit (together with project leader)
- Coordination/moderation of discussions during site visits
- Organisation (bookings, etc.) and payment or reimbursement of travels and subsistence for visitors (in close collaboration with travellers), and of local arrangements in close collaboration with the organisation team
- Compilation of site visit minutes and detailed country reports (together with project leader and respective visited sites)

4.2 Visitors

Visitors can visit syndromic surveillance systems of one or more countries. The number of visitors per site visit should not exceed 10 visitors. The composition of the visiting team is:

- The **project leader** and the **WP5 leader** participate in all site visits as rapporteurs. They will be in charge of compiling the visit minutes and country reports to allow for better comparison of information among the sites.
- **Associated and collaborating partners** and external parties constitute the main body of the visiting group. Each participant may visit one or several systems though the number of visitors per visit is limited. Therefore, the following criteria have been developed for selecting participants:
 - EU coverage (Triple-S partners or other member states)
 - Participants from well experienced and less experienced countries (in the use of syndromic surveillance)
 - Expression of interest to visit a specific site
 - Expression of interest by visited site in expertise of representatives of a specific country/syndromic surveillance system

- Advisory Board members **European Commission Directorate General for Health and Consumers** and **European Centre for Disease Prevention and Control** may participate in all site visits as observer and advisor on their own costs.
- Advisory Board member **World Health Organization Regional Office for Europe (WHO Europe)** may participate in all site visits as observer and advisor. If the visiting group for a site visit exceeds the maximum number, WHO Europe may participate on own costs.

The leader of WP 5 coordinates the selection process for each visit a few months before the site visit. Potentially interested Triple S partners and external institutions will be contacted by email and requested to fill a standardised form in order to express their specific interests in participating in site visits or visiting a specific site. Potential external participants will be mainly identified by contacting institutions from the networks of all project partners and the contacts of the inventory (WP4). To inform external participants about the purpose of the site visits and attract their attention a special leaflet is developed by WP 5 leader that can be sent by email and downloaded from the project's website. If a selection of participants is necessary, WP 5 leader will prepare a first selection for shortlist and waitlist including inclusion/exclusion reasons to be discussed among the Triple S WP leaders.

Visitors have the following **tasks**:

- Providing a short CV elaborating on the expertise regarding syndromic surveillance
- Formulation of key points of interests towards the visited site, syndromic surveillance in general and regarding the own syndromic surveillance activities
- Active participation in discussions during site visit
- Preparation of information or presentation of own syndromic surveillance experience if requested by visited site (especially for visits of planned systems)

4.3 Visited site/s

Country visits are characterised by visits of one or more existing, pilot, planned and/or expired syndromic surveillance systems. Representatives of one or more syndromic surveillance systems of one country are represented in the teams of visited sites. If it is logistically feasible, the site visit could either take place at one site and representatives of other syndromic surveillance systems in the country travel to this site or different places are visited by the visiting team during a country visit. Further stakeholders (local, regional, national level) should be invited to join the site visit, e.g., data provider or policy representatives, to broaden the discussions. Also, external visits to e.g., data providers, could be organised to offer different perspectives.

The number of site visits covered by the Triple S project budget is limited to eight. Sites will be selected based on the following criteria:

- Mix of well experienced and less experienced countries (in the use of syndromic surveillance)
- Formulation of concrete interests and reasons why a site should be visited

During the Kick-off Workshop in November 2010 the first two countries were selected by the project group: United Kingdom (June 2011) and France (September 2011) with the longest experience in syndromic surveillance in Europe. The leader of WP 5 coordinates the **selection process** for the other visited sites continuously until end of 2011 based on suggestions from the project group, external parties and also based on the results from the inventory (WP 4). Potentially interested sites will be contacted by email in order to express their interests in hosting site visits in their country. The proposals will be discussed among the Triple S WP leaders.

The **organisation team** of the visited country most probably constitutes of representatives of one or more syndromic surveillance systems of the country. This team will be in charge of organising the site visit locally. Explicitly, the team has the following **tasks**:

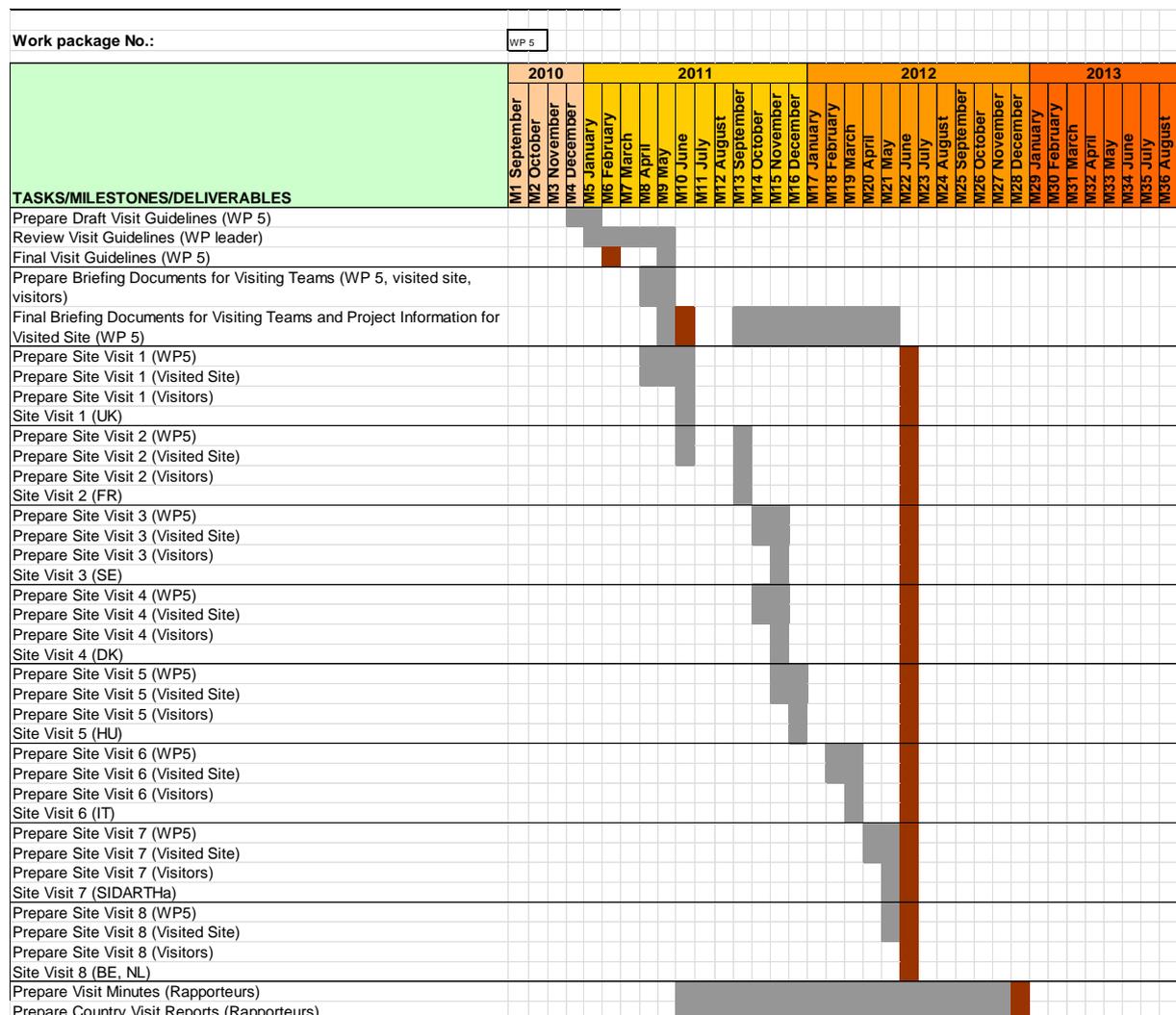
- Identification of central contact person/s for the WP 5 leader
- Identification and contact to most or all syndromic surveillance initiatives in the country that could take part in the visit (existing, pilot, planned, expired)
- Identification of a suitable date for the site visit at which most of the stakeholders and other syndromic surveillance system sites are able to participate
- Invitation of further local/regional/national stakeholders (e.g., data provider, policy representatives) to participate in the site visit
- Organisation of outside events such as e.g., a visit of a data provider
- Suggestion/discussion of agenda with WP 5 leader
- Recommendation of suitable accommodation, local transport options, meeting facilities and catering services to WP 5 leader (to be booked and paid by WP 5 leader)
- Provision of information and material for Briefing Documents (agenda, list of participants, syndromic surveillance system information, publications, etc.) to WP 5 leader
- Identification of interests in syndromic surveillance experience represented in the visiting group
- Organisation of presentations of syndromic surveillance system/s during site visit
- Provision of information and discussion about the visited syndromic surveillance systems before and during the site visit (according to the scientific guidelines)
- Reviewing/contributing to visit minutes and country reports

5. Timeline, Logistics & Finances

5.1 General Timeline of Site Visits

The foreseen eight site visits take place between June 2011 and June 2012. It is assumed that preparation of a site visit takes three months. The figure below shows the draft timeline of tasks of WP 5, WP leaders, visitors, visited site and rapporteurs (WP 5 leader, project leader) and the timing of the milestones and deliverables. This timeline may be adjusted after the experiences of the first two site visits.

Red = deliverable/milestone



5.2 Timeline of Site Visit Preparation

The table below proposes the timeline of tasks for the preparation of a site visit and the responsible partners (WP 5 leader, visitors, and organisation team of visited country) starting three months before a site visit.

> 3 months before site visit	<ul style="list-style-type: none"> ▪ Coordination of contact/selection process of visitors (WP 5 leader) ▪ Contact with other syndromic surveillance systems in visited country and fixation of date for site visit (organisation team of visited country)
2-3 months	<ul style="list-style-type: none"> ▪ Invitation of other syndromic surveillance system representatives from the same country to join site visit or organisation of further site visits (organisation team) ▪ Invitation of stakeholders of syndromic surveillance systems (e.g., data provider, policy representatives) (organisation team) ▪ Organisation of external visit (e.g., data provider) (organisation team) ▪ Draft agenda (organisation team & WP 5 leader) ▪ Teleconference for organisation of visit (coordination WP 5 leader)
1 month	<ul style="list-style-type: none"> ▪ Organisation of local arrangements, e.g., meeting room, catering, accommodation (WP 5 leader in collaboration with organisation team) ▪ Travel arrangements (WP 5 leader in collaboration with visitors) ▪ Provide information for briefing documents to WP 5 leader (visited sites) ▪ Teleconference for organisation of visit (coordination WP 5 leader)
2 weeks	<ul style="list-style-type: none"> ▪ Provide briefing documents to visitors (WP 5 leader) ▪ Provide project information to visited sites (WP 5 leader) ▪ Teleconference for organisation of visit (coordination WP 5 leader)
1 week	<ul style="list-style-type: none"> ▪ Last communications (coordinated by WP 5 leader)

5.3 Agenda & Structure of Site Visits

The average length of a country visit is four days including travel. Depending on how many sites are visited per country the length and agenda of each country visit is adjusted. A first agenda will be drafted 2-3 months before a site visit by the organisation team in the visited country and the WP 5 leader. The final agenda is provided as part of the Briefing Documents two weeks before the site visit.

The **agenda** of a site visit and the setup of presentations and foci of discussions should be inspired by the scientific guidelines to make the knowledge exchange process transparent and to give a common framework for each visit. External stakeholders, e.g., data provider, should be involved in sessions related to their area of expertise in order to provide different perspectives. This knowledge exchange with external stakeholders could also be organised in the form of visits to external sites, e.g., an emergency department. The **last session** of a site visit should be a synthesis session with the aim to highlight strengths and weaknesses, specific lesson's learned, and to explore the link between the system characteristics and quality indicators. Sessions should consist of **presentations and enough time for questions and discussions**.

At the end of the visit, a session for reflection of the visit by visitors and visited site should be included.

5.4 Finances & Logistics

The total budget allocated to the site visits is € 78,000. This amount will be covered to 100% by the European Commission contribution. The budget is planned to cover eight country visits for six participants for four days. This is an orientation and the budget will be adjusted to the necessities of each site visit, i.e., some visits might need to last longer and others shorter, some visits will be attended by more, others by less participants, etc. The WP 5 leader is responsible to control the budget for the site visits.

The following costs can/cannot be covered (following EU rules):

- **Eligible Costs:**
 - Travel, local transport, accommodation costs of visitors for site visit
 - Travel, local transport, accommodation costs of stakeholders from the visited country who do not have their regular place of work or residence in city that functions as venue
 - Catering during site visit
 - Meeting facilities costs during the site visit (if necessary)

- **Non-eligible Costs:**
 - Staff costs/wages
 - Costs for preparation of the site visit
 - Travel, accommodation or local transport for representatives based at visited site
 - No-show or cancellation fees
 - Extras (e.g., minibar), tips

The following EU rules apply to **travel arrangements**:

- travel by the most direct and most economic route;
- distance of at least 100 km between the place of the meeting and the normal place of work;
- travel by rail: first class;
- travel by air: economy class, unless a cheaper fare can be used (e.g. Apex); air travel is allowed only for return journeys of more than 800 km;
- travel by car: reimbursed on the basis of € 0.19 per km

The WP 5 leader will coordinate travel and local arrangements in close collaboration with the travellers and the local organisation team. In general, **all bookings and payments will be done by the WP 5 leader** so neither the visitors nor the visited sites have expenses. Only in exceptional cases and if it cannot be arranged otherwise participant's expenses will be reimbursed by the WP 5 leader based on original bills. The WP 5 leader will provide a reimbursement form during the visits.