

# **International CLIVAR Project Office Staff Handbook**

*A Guide to the Responsibilities, Duties and Procedures of ICPO Staff in Supporting the CLIVAR Scientific Steering Group, CLIVAR Panels/Research Foci and WCRP*

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## 1. **Introduction**

The strategic mission of the ICPO is to facilitate and stimulate international cooperation and coordination to advance the goals of the CLIVAR project. The ICPO provides secretariat support to CLIVAR committees, communicates CLIVAR results and activities, and also aims to help garner more resources (human, financial and institutional), to contribute to CLIVAR activities.

With the initiation of CLIVAR in 1995, the first ICPO was located in Germany at the Max Plank Institute in Hamburg. In 1998 the ICPO moved to the National Oceanography Center in Southampton, UK, where it operated until March 2014. On closing of the UK office, WCRP and CLIVAR leaders welcomed offers from China and India to host the ICPO and the continuing support of the USA. A distributed ICPO structure, building on the strengths of multiple institutions that can offer support to the international coordination of CLIVAR activities, is in the interests of both CLIVAR and the WCRP.

The ICPO currently consists of two offices, one at the First Institute of Oceanography in Qingdao, China (the International CLIVAR Global Project Office (ICGPO)) and another at the Indian Institute of Tropical Meteorology in Pune, India, (the International CLIVAR Monsoons Project Office (ICMPO)). In order to ensure close cooperation and coordination, all ICPO staff report to an Executive Director who acts as the primary interface with the CLIVAR SSG Chairs and the Director, WCRP.

ICPO staff must maintain up to date knowledge of CLIVAR science and implementation, particularly in their fields of responsibility, and be adept in organizing meetings, taking minutes, writing reports and communications in general. In addition, the success of CLIVAR depends on building effective networks of scientists around the world and ICPO staff are encouraged to develop and maintain close relationships with the members of the various CLIVAR panels and Research Foci and the community at large.

The ICPO operates with the same overall goal as CLIVAR: to facilitate international cooperation and coordination. The ICPO must be a cooperative and well-coordinated entity. In this respect, all staff, regardless of their location, should consider themselves first as ICPO staff and report to the ICPO Executive Director through their local lines of authority as appropriate. All ICPO staff are expected to join regular virtual staff meetings that are organized under the direction of the ICPO Executive Director and to report on their respective activities and tasks. As per the Memorandum of Agreements, the ICPO offices will submit an annual report on activities and accomplishments to the Executive Director who in turn will report to the Director, WCRP and the CLIVAR SSG Chairs.

The specific tasks of the ICPO are:

- Support the CLIVAR SSG and panels/Research Foci through organisation of annual meetings/panel and research foci meetings, generating and publishing meeting reports and other material relevant to the CLIVAR programme, and providing inter-sessional assistance as needed.
- Supervision of the international co-ordination and execution of the Implementation Plan.
- Support of community networks associated with CLIVAR related science
- Develop and implement an information management system for CLIVAR.
- Represent the project at scientific conferences and other international meetings through scientific presentations and exhibitions.
- Distribute information and recommendations to international, national and regional sponsors and funders of CLIVAR related research.
- Distribute relevant scientific information to the CLIVAR community.

These responsibilities and associated procedures are provided in further detail in the following sections (sections 2 to 6).

## **2. CLIVAR corporate guidelines**

### **2.1. CLIVAR Governance**

The CLIVAR SSG is responsible for the overall direction of the project and reports to the Joint Scientific Committee of the WCRP. Panels and Research Foci report to the SSG. The ICPO supports the SSG, and acts as an extension of the WCRP Joint Planning Staff.

The ICPO Executive Director is responsible for the overall management of the ICPO and reports to the SSG Chairs and the Director, WCRP.

### **2.2. ICPO Staff code of conduct**

The purpose of this code is to provide a clear framework within which members of the ICPO are expected to conduct themselves. ICPO strives to maintain a work environment for its staff in which honesty, integrity and respect for fellow employees and the CLIVAR community are constantly reflected in personal behaviour and standards of conduct.

CLIVAR is a large international project and the actions and behaviour of ICPO staff have an impact on the trust that the scientific community have on the project. ICPO staff are expected to have regard for the impact of their personal behaviour on their colleagues and the CLIVAR community.

The ICPO receives a substantial income from public sources from different countries. It is essential that all these stakeholders have confidence that the ICPO maintains the highest

standards of conduct in scientific and financial matters and seeks to maintain high standards of probity and ethical behaviour.

### **2.3. Conflicts of interest**

The highest standards of behaviour are also expected in all areas of the project, especially where individuals are in positions to make decisions which may have significant impact on others. In all such cases it is important that decisions are taken in a fair and balanced way that can withstand external scrutiny. ICPO staff employed by different national organisations should respect those institutions' code of conduct. However, the ICPO staff does not represent individual, scientific or otherwise, interests of those institutions, and should work towards the common interest of CLIVAR.

### **2.4. Use of CLIVAR image**

The consistent use of the CLIVAR identity across all our corporate materials helps build recognition and familiarity with our identity. The use of CLIVAR logo on any promotional and corporate material including publications, reports, presentations, websites and stationery is required.

### **3. SSG Responsibilities**

#### **3.1. SSG Meeting Procedures**

- i ICPO-ED works with Chairs to develop a draft agenda for the meeting.
- ii ICPO-ED sends invitations to SSG members at least four months prior to the meeting. Panel co-chairs and Research Foci leaders are ex-officio members of the SSG. They are also informed about the meeting and asked to decide who will represent the panel/Research Foci at the meeting.
- iii ICPO-ED shares the draft agenda with the JPS and JSC Chair at least two months prior to the meeting.
- iv The travel support procedure should be initiated at least four months prior to the meeting (see section 3.2).
- v ICPO-ED emails panel chairs and Research Foci (RF) leaders four months prior to the SSG, with a request that each group submit a report for the SSG meeting and deliver a presentation at the meeting. The report should be submitted at least two months prior to the SSG meeting, with Meeting Request Forms for any meetings/workshops planned for the next calendar year (see Appendix 4).
- vi Staff scientists work closely with their respective panel members and RF leaders to complete the report and meeting request form before the deadlines.
- vii ICPO-ED provides SSG members with up-to-date membership lists for all panels two weeks prior to the meeting to inform membership discussions.
- viii Reminders are sent to all panel co-chairs, RF leaders and SSG members by ICPO-ED (and followed up by Staff Scientists where necessary) regarding attendance at the SSG meeting two months prior to the event.
- ix The list of action items emerging from the SSG meeting is shared amongst participants, SSG members, and panel chairs by ICPO-ED within a month of the meeting.
- x Staff scientists are assigned to help support each action item and are responsible for following up action from the specified individuals by the specified deadline.
- xi ICPO-ED works with SSG co-chairs and the wider SSG to complete a report of the SSG meeting.

#### **3.2. SSG Approval for Panel and Research Foci Meetings**

- i ICPO-ED contacts panel co-chairs and Research Foci (RF) leaders four months before SSG meeting requesting proposed meetings for the next fiscal WCRP year (January-December)

- ii Staff Scientist assists Panel co-chairs and Research Foci (RF) leaders in preparing a first draft of the Meeting Request Form (MRF, see Appendix 4 for form).
- iii MRF submitted to SSG with Research Foci/panel reports (at least two weeks before SSG meeting).
- iv SSG members provide comments on and priorities of proposed meetings (four weeks after SSG meeting).
- v ICPO staff reviews comments and interacts with panels and/or RF through Staff Scientists to improve details in request forms (two months after SSG meeting).
- vi Revised MRFs reviewed by SSG resulting in one of three actions: Meeting endorsed; Meeting denied; or MRF returned to staff scientist for additional information (three months after ICPO review).
- vii ICPO-ED compiles endorsed MRFs and submits a summary budget request to WCRP JPS (four weeks after SSG meeting).

### **3.3. SSG Membership Rotations**

Details about SSG membership is given in Section 5.1.

### **3.4. Endorsement of Projects by CLIVAR**

- i Request for CLIVAR "endorsement" for a research project received by the ICPO.<sup>1</sup> Full details can be found at <http://www.clivar.org/the-science/endorsed-projects/endorsement-criteria-and-process>
  - Requests should include:
    - Objectives, scope, duration, and relevance to CLIVAR's present activities.
    - The perceived benefits of the endorsement to both the proposed activity and to CLIVAR/WCRP.
    - How the project might interact with CLIVAR and the proposed form of any joint activities with CLIVAR.
    - Description of any financial implications.
  - ii The information is passed by ICPO-ED to the co-chairs of the appropriate panel for comment. Staff scientists are responsible for ensuring comments are received from the co-chairs within the agreed timeframe.
  - iii ICPO-ED, after receiving comments from the co-chairs, compile responses and submit endorsement requests to the SSG.
  - iv The ICPO will inform the proposer (in the name of the SSG co-chairs) CLIVAR's response, describing the form of the collaboration/endorsement that CLIVAR is willing to provide.

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<sup>1</sup> [icpo@clivar.org](mailto:icpo@clivar.org)

- NOTE: Whenever possible this process should take no longer than two months from receipt of the formal request.
- v Annual progress from active Endorsed Projects are to be included annual report of the associated panel.

### **3.5. Endorsement of activities by CLIVAR**

- i. Requests for CLIVAR endorsement of activities (conference, meeting, workshop or summer schools) may be seen as helpful in getting financial support from national agencies for such activity. Full details can be found at <http://www.clivar.org/the-science/endorsed-projects/endorsement-criteria-and-process>. Endorsement for these activities does not imply a financial support from CLIVAR.
- ii. Requests should include:
  - Title of meeting or workshop
  - Proposed venue
  - Proposed dates
  - Proposed attendees, including likely number
  - Rationale, motivation and justification, including relevance to CLIVAR
  - Specific objectives
  - Anticipated outcomes
  - Draft agenda
  - Format
  - Science Organising Committee
  - Local Organising Committee
- iii. In case of such request, applications for endorsement should be made to the ICPO ([icpo@clivar.org](mailto:icpo@clivar.org)) against the headings listed above.
- iv. The information is passed by ICPO-ED to the SSG co-chairs. After receiving initial comments from the co-chairs, the proposal is passed onto all SSG members.
- v. The ICPO will inform the proposer (in the name of the SSG co-chairs) CLIVAR's response.
  - NOTE: Whenever possible this process should take no longer than one month from receipt of the formal request.



- vi. Endorsed activities should display CLIVAR logo in all their material, including their website.

## 4. Panel/Research Foci Responsibilities

### 4.1. CLIVAR Panel/RF Meeting and Workshop Preparation

- i Discuss and proposed the time and venue for the next panel/RF meeting during the last panel/RF meeting. The final decision should be made at least two months before the SSG meeting.
- ii The co-chairs should identify the local host and funding sources before making the final decision.
  - The local contact should ensure the availability of a meeting room (plus equipment for presentations) and smaller rooms for breakout sessions if required.
  - The host institution may provide coffee breaks and/or lunch. The local contact should provide information on other options if not provided.
  - The local contact should provide information on accommodation (and arrange block bookings) and travel.
  - The local contact is responsible for generating invitation letters as needed for the purpose of participants obtaining visas to enter the country hosting the meeting. If there is a requirement that the invitation letter also contain information about funding support, the local host should coordinate with the responsible staff scientist.
- iii The panel/RF needs to prepare the Meeting Request Form for SSG approval for meetings (APPENDIX 4).
- iv The funding requests from panel/RF will be discussed and approved during the SSG meeting.
- v US CLIVAR will fund the members from US to attend the panel/RF meetings. For meeting organised in US, US CLIVAR might be able to provide some funds for local logistics. ICPO to send the local host's contact to US CLIVAR Project Office to make further contact;
- vi For workshops organised by CLIVAR, possible funding support could be explored from WCRP, US CLIVAR, NOAA, IOC, etc. ICPO liaison staff are supposed to coordinate with panel co-chairs and RF leaders to explore possible funding support.
- vii Co-chairs develop the agenda with the support of the staff scientists and in consultation with the panel.

- viii Meeting agendas, badges and registration sheets should be made available on the first day of the meeting.
- ix During the meeting, staff scientists are responsible for taking note of the discussions and agreed action items (including deadline, responsible persons, etc.).
- x Staff Scientists collect all presentations to be posted on the meeting webpages subject to the approval of the presenters.
- xi Staff scientists develop a list of action items in consultation with co-chairs and attendees.
- xii Staff scientists ensure that action items are accomplished by the agreed timeframe.
- xiii Staff Scientists are responsible for writing up meeting/workshop reports, in association with co-chairs/organising committees within two months after the events. The report should be structured and formatted as per Appendix 2.
  - NOTE: Presentation summaries will only be included in the report if they are relevant to an action item.

#### **4.2. Travel Support**

- i ICPO liaison staff to coordinate with panel co-chairs/RF leaders to prepare the invitation email (See APPENDIX 5 and APPENDIX 6 for templates) and draft agenda;
- ii ICPO liaison staff to send invitation email on behalf panel co-chairs/RF leaders;
- iii ICPO liaison staff to collect requests for travel support from panel/RF members (and may also from invited participants);
- iv ICPO liaison staff will send the agenda and a simplified table (see APPENDIX 7) to ICPO Admin assistant to prepare the WCRP funding request at least two months in advance for non-US members (See APPENDIX 8 for template) and submit it with the draft agenda of the meeting to WCRP Joint Planning Staff to process the travel support.
- v By the end of the year, the Executive Director of ICPO will send the list of meetings and workshops for next year and the list of panel/RF members from US to the Director of US CLIVAR Project Office. The US members from each panel/RF will be contacted directly by staff from US CLIVAR Project Office to process their travel support.
- vi Expenses that are eligible to be reimbursed by WCRP are: flight tickets, per diem, registration fee, visa fee and terminal expenses. In some cases, cost for meeting venue can also be covered by WCRP.

- The WMO travel agent (CWT) will send a proposed itinerary with most economic route to participants directly. See item 4.2ix for more details.
  - The WCRP way for calculating the per diem rate is 150% of the average hotel cost in the meeting city, and usually is (are) the one(s) recommended by the local host. However, the per diem rate should not go over the United Nations' Daily Subsistence Allowance (DSA) rate in that city.
  - Some panel meetings are to be organised alongside other meetings/workshops, and asked for a registration fee. If the lunch is included in the registration fee, then 15% of the per diem rate will be deducted.
  - The terminal expense should not go over the UN rate, see APPENDIX 9. Terminal expense cannot be paid if the tickets are not funded by WCRP.
  - Local trips to apply for visa cannot be reimbursed by WCRP.
  - In some rare cases, when venue cost needs to be paid by WCRP, a Letter of Undertaking (LoU) (see APPENDIX 10) is required to be signed between WMO and service provider.
- vii After being contacted by WCRP JPS, the participants should return the signed Request for Financial Assistance (RFA) Form (See APPENDIX 11) by a certain date required by WCRP JPS;
- viii After receiving the signed RFA form from participants, WCRP JPS will prepare the Travel Authorisation (TA) Form (See APPENDIX 12) and send to WMO travel agent (CWT) to suggest travel itinerary. WCRP JPS will no longer be involved once TA being prepared.
- ix Travellers will be contacted by WMO travel agent (CWT) with a proposed itinerary based on the WMO travel policy and the dates and place of meeting. Upon receipt of this proposal, travellers are requested to accept or deny the proposal. See APPENDIX 13 for WCRP guideline on tickets purchasing.
- x In particular cases, e.g. when the WCRP funds are not sufficient for a panel/RF meeting, a lump-sum payment could be applied. See APPENDIX 14 for details. However, only one payment modality should be applied in one travel request form for WCRP, i.e. if we decide to use lump-sum payment, it will be applied to all participants being funded by WCRP for that event.

#### **4.3. Responsibility before, during and after the meetings**

- i The ICPO liaison staff should assist the local host in contacting hotels to arrange meeting room (with AV devices to enable telecon), coffee break, lunch (not mandatory), accommodations and payment;

- ii ICPO liaison staff to prepare badges and may other meeting materials if necessary;
- iii ICPO liaison staff to participate in the meeting in person or remotely, and promote it via social media (Twitter) during the meeting;
- iv ICPO liaison staff to prepare news for CLIVAR website and bulletin within one week after the meeting;
- v ICPO liaison staff to prepare the draft report for the panel/RF meeting within 2 months after the meeting.

#### **4.4. Panel Membership Rotations**

Details about Panel membership is given in Section 5.2.

## **5. SSG and Panel membership**

### **5.1. SSG Membership Rotation**

- i ICPO places a call for nominations on the CLIVAR website, in Exchanges and e-Bulletin in the third quarter of the year (see Appendix 1 for example).
- ii ICPO Executive Director (ICPO-ED), prepares a first list to be discussed by the CLIVAR SSG.
- iii After agreement by the SSG, ICPO-ED prepares a final list of at least two candidates for each empty position, as required by the JSC<sup>2</sup>, with first and second choice candidates. Reasons for a ranking or the impossibility to find an alternate should be briefly stated. This list also includes proposed extensions of the terms for already serving members.
  - The initial terms of service for members is four years, with one possible extensions of two years each. When moving up to chair/co-chair the clock can be reset. For an outgoing chair a 1-year extension as an SSG member is possible. JPS will maintain and update a complete record of times of service for each member.
- iv The following requirements should guide the selection process:
  - Members should have excellent general scientific and technical qualifications relevant to CLIVAR's activities.

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<sup>2</sup> Based on discussions at the SSG sessions and on consultations with SSG members, JSC members and JPS.

- SSG membership expertise should cover all areas of research where CLIVAR plans to continue or develop specific activities.
  - SSG membership should be balanced in terms of geography, gender and age.
  - Participation of scientists from developing countries on the SSG is a key factor for WCRP success.
- v ICPO-ED submits a list of candidates/members and their respective resumes to JSC Membership Committee at least three months prior to the JSC meeting.
  - vi Consultation of the nominations (e.g. by teleconference) happens among JSC liaisons, SSG co-chairs and JPS to arrive at a balanced proposal. This process takes place 1-3 months prior to the annual JSC session.
  - vii The ICPO is informed of any declined candidate nominations/member renewals by JPS (as notified by the JSC Chair). Additional information or new candidates may be required by the JSC. The target is to complete the cycle of pre-approval and notification to the ICPO in four to six weeks.
  - viii One month before the annual JSC session, SSG co-chairs send a letter to explain the current situation and the reasons for the proposed slate. SSG also send CVs in standardised form for the proposed members and the alternates. JPS submits a consensus summary document to JSC Officers, which provides nominations and associated information required for JSC review and endorsement.
  - ix Half month before the session, JPS produces a summary table, including: Name; Gender; Year of PhD obtained; Affiliation, Country; Citizen Country; Expertise; Member since & until (year); Membership recommendation; with statistics per group/body of: Gender, Year of PhD obtained, and region of origin.
  - x JPS compiles a complete list of all approved members and presents it to the JSC at its annual meeting. Within three months after the JSC Session, JPS completes the letters of appointment and term extensions for transmission to the selectees.
  - xi ICPO-ED/ICPO-ED receives a copy of all letters of appointment and term extensions from the JPS.
  - xii Unsuccessful nominees are informed by the JPS or ICPO.
  - xiii ICPO inform unsuccessful self-nominees, or nominators in case of third party nomination, who did not make the final list to the JSC
  - xiv ICPO maintains a database of all unsuccessful nominees for future reference.

## 5.2. Panel Membership Rotations

- i ICPO places a call for nominations on the CLIVAR website, in Exchanges and in the e-Bulletin **in the third quarter of the year** (see Appendix 1 for example).

- ii Staff Scientists prepare a draft list of members with term expiring and new nominations from the open call to be discussed by panel co-chairs. Co-chairs are free to make their own nominations if nominees do not satisfy the lack of expertise in the panel
  - The initial terms of service for members is **three years**, with one possible extensions of two years. In exceptional cases, a further one-year extension may be considered, subject to suitable justification. When moving up to co-chair, another 2 years will be added to his/her current term.
- iii After agreement by the panel, ICPO prepares a final list with two candidates for each empty position, with first and second choice candidates. This final list needs to be submitted to the SSG at least one month before SSG's annual meeting. In cases where panels are co-sponsored by other organizations, the proposal should be sent simultaneously to all sponsoring organizations.
- iv When considering all nominations, the panels take into account the scientific expertise that will support fulfilment of panel terms of reference and seeks endorsement from the CLIVAR SSG. Furthermore, scientifically qualified nominations should be encouraged in support of gender and geographical balance as required by the World Climate Research Programme, and where appropriate to promote opportunities for scientifically qualified early career scientists and researchers from developing countries to participate in CLIVAR activities.
- v ICPO will maintain and update a complete record of times of service for each member.
- vi All new applications should include a resume for each candidate (see Appendix 17).
- vii After decision by the SSG, the ICPO administrator invites the successful candidate on behalf of ICPO-ED and sends letters to the unsuccessful candidates.
- viii Admin Assistant also updates membership lists on the webpages, all panels email lists, and table of email lists on Google Drive.

## 6. Communications

### 6.1. Email system

The ICPO email system is based on Google Apps. Only ICPO staff with admin rights can create or delete accounts. The ICPO webmaster and at least one other member of the ICPO staff has admin rights for Google Apps.

## 6.2. Website

Staff Scientists are responsible for keeping webpages relating to their respective panels/RF up to date and interesting.

The ICPO Admin Assistant is responsible for updating the membership list for SSG, panels and Research Foci after membership decisions are made.

## 6.3. Exchanges

- i The ICPO-ED is the chief editor of Exchanges.
  - CLIVAR Exchanges is a themed publication. If the theme is around a particular panel/RF, the relevant staff scientist should act as editor, together with any panel or RF member(s) and ensure that all articles are submitted on time. Also, other panel members can be asked to serve as editors according to their expertise.
  - Staff should be aware of, and also encourage articles for non-themed issues.
- ii The editor collates articles, edits as required, and sends to the Desktop Publishing Operator, who will draft the edition in accordance with a specified template.
- iii The Desktop Publisher Operator uploads the final high-resolution pdf file to the website.
- iv Admin Assistant is responsible to generate doi number for each issue of Exchanges.

## 6.4. Bulletin

The CLIVAR Bulletin is distributed monthly and published on the **5<sup>th</sup>** of each month. All ICPO staff are responsible of providing the news to be included in the bulletin no later than the **28<sup>th</sup>** of the previous month. The ICPO Admin Assistant is responsible of preparing the Bulletin in mailchimp following the below steps. The final publication of the bulletin will be subject to the approval by the responsible staff scientist and the ICPO-ED.

- i. Login to Mailchimp at <http://mailchimp.com/> (username: Clivar, password: Check with ICPO Admin Assistant)
- ii. Hover over previous campaign, select 'replicate'.
- iii. Edit the title.
- iv. Change the tracking to reflect the bulletin number and month.
- v. Edit the content.
  - The bulletin should contain:
    - **CLIVAR News and Announcements**
      - ✓ Conferences, Meeting, Workshops and Summer School organised by CLIVAR;
      - ✓ CLIVAR publications;
      - ✓ Open Calls for membership and other issues;
      - ✓ Staff changes of ICPO;

- ✓ Events attended by SSG/panel/RF and ICPO staff on behalf of the CLIVAR Community;
    - ✓ Other important events related to CLIVAR or CLIVAR members.
  - **CLIVAR Science Highlights**
    - ✓ CLIVAR-related research that has been published, with an emphasis on recent and interesting findings, and to share these highlights with the broader scientific community.
  - **Partner Programmes News**
    - ✓ Key issues (e.g. statement, scientific publication, call for members, etc.) from key CLIVAR Partners (e.g. WCRP, US CLIVAR, WMO, IOC-UNESCO, SCOR, PAGES, PICES, Future Earth, APN, IUGG, etc.)
  - **Early Career Scientists**
    - ✓ Training opportunities;
    - ✓ Funding support opportunities;
    - ✓ Other opportunities with emphasis on Early Career Scientists.
  - **Meetings and Workshops**
    - ✓ Should be international events;
    - ✓ Topics are relevant to CLIVAR science and panel/RF focused researches;
    - ✓ Opportunities to foster international cooperation on global or regional issues that could not be resolved by single nation or organisation.
  - **Funding Opportunities**
    - ✓ Aperiodic compiled information from donors that would provide any kinds of financial support to ocean and climate researches.
  - **Upcoming events**
    - ✓ Brief summary of events organised by CLIVAR, its partners or events with high relevance to CLIVAR science.
- vi. Insert anchors next to the news headings, and link to the contents using hash tag before the anchor name.
  - vii. Check upcoming CLIVAR events (right hand panel). Remove any past events and add any future events not mentioned.
  - viii. After testing, the bulletin is sent to the CLIVAR mailing list via Mail Chimp.
  - ix. Make sure the bulletin is posted on the CLIVAR website (<http://www.clivar.org/clivar-bulletin>) and social media sites.

## 6.5. Reports

- i If report is from SSG meeting, the ICPO-ED, sends the draft report to the CLIVAR liaison at the WCRP Joint Planning Staff (JPS) and SSG co-chairs for comments. If report is from a meeting of a panel that is co-sponsored by any of the other WCRP Core Projects, Staff Scientist sends draft report, after reviewed by panel co-chairs, to CLIVAR liaison at the JPS and ICPO-ED for comments.



- ii After final draft agreed, the CLIVAR liaison at the JPS will forward the document to the WCRP Communication Officer for formatting and numbering. The documents described above will have only a WCRP Publication Number.
- iii The CLIVAR liaison at the JPS, or the WCRP Communication Officer, inform the ICPO Administrator of the URL of the report, so that the report can be also uploaded to the CLIVAR website.
- iv If report is from a CLIVAR panel or RF-only, Staff Scientist sends draft report, after reviewed by panel co-chairs/RF leaders, to ICPO-ED for comments.
- v After final draft agreed, Staff Scientist sends document to ICPO Admin Assistant for final formatting. It will follow the WCRP guidelines (<https://www.wcrp-climate.org/cr-publications/wcrp-pub-layout>), with exception of cover and numbering. Cover template is  
  
<https://drive.google.com/a/clivar.org/file/d/0B0FLotRq3PZCNHVwNDRNNFYtaFU/view?usp=sharing>
- vi Admin Assistant formats the document in line with guidelines.
- vii Admin Assistant allocates the ICPO informal reports number from Publications database, and adds details to the database.
- viii The document is converted into a pdf.
- ix Admin Assistant ensures that the report is on the CLIVAR website and informs Staff Scientist of URL.

## 6.6. Social Media

### *Facebook*

- i Log in to the ICPO's Facebook page at [www.facebook.com](http://www.facebook.com)
  - The ICPO is an administrator of the CLIVAR Facebook page
- ii Username [icpo@noc.ac.uk](mailto:icpo@noc.ac.uk) (*contact ICPO administrator for password*)
- iii Find the CLIVAR Facebook site at <http://www.facebook.com/clivar>
- iv Click on 'Edit page' and select 'Use Facebook as Climate Variability and Predictability' from the drop-down menu
- v Happy posting!
  - Any posts made on CLIVAR's Facebook page will automatically appear in CLIVAR's Twitter feed.

### *Twitter*

- i Log in to CLIVAR's Twitter profile at [www.twitter.com](http://www.twitter.com)
- ii Username [icpo@noc.ac.uk](mailto:icpo@noc.ac.uk) (*contact ICPO administrator for password*)
  - CLIVAR's Twitter page is [https://twitter.com/WCRP\\_CLIVAR](https://twitter.com/WCRP_CLIVAR)
- iii Tweet away!
  - Any posts made on CLIVAR's Twitter page will automatically appear in CLIVAR's Facebook feed.

### **6.7. Logos and Images**

A shared file repository for logos and images, available to all ICPO staff, at: <https://drive.google.com/drive/folders/1r8MgefSKQJ-VS6lywtpxXWeSFM0ZRbpH?usp=sharing>

### **6.8. ICPO Calendar**

The “owner” of the ICPO calendar is the [icpo@clivar.org](mailto:icpo@clivar.org) account. Its main calendar needs to be shared with any other staff so they can input their own movements. Each staff should use a different colour for their own activities.

It is suggested that entries are in the format “Name - Activity”

### **6.9. GoToMeeting**

The ICPO has an account with GoToMeeting for telecons. Any ICPO staffer can create meetings. However, it is not possible to host parallel meetings. Please check if another meeting has been created before creating yours.

Meetings can be created either via the web interface ([www.gotomeeting.com](http://www.gotomeeting.com)) or via the app installed in your computer.

Username [icpo@clivar.org](mailto:icpo@clivar.org) (*contact ICPO administrator for password*)

### **6.10. Staff meeting and telecon**

- i Each ICPO node is encouraged to have weekly staff meetings. ICGPO in Qingdao has weekly meeting and circulate the meeting minutes among ICPO staff.
- ii ICMPO is required to send a summary of their activities by the end of each Friday to ICPO Admin Assistant to be included in the ICPO weekly meeting minutes;
- iii ICPO has monthly telecon at the beginning of each month with the participation of all ICPO staff via GoToMeeting.



## **APPENDIX 1 Call for Nominations for Experts to Serve CLIVAR Panels**

CLIVAR seeks qualified individuals to serve on its panels

These groups formulate goals and required strategies, catalyse and coordinate activities, and work with agencies and other international partners to advance the progress of the climate research community, particularly with regard to addressing relevant goals of CLIVAR and the World Climate Research Programme (WCRP). Qualified nominees are expected to represent the broader interests of the research community, be willing and able to engage in scientific as well as programmatic discussions, lead the activities of the particular group, and work with other members of the CLIVAR organisation.

When considering all nominations, the panels take into account the scientific expertise that will support fulfilment of panel terms of reference, and seeks endorsement from the CLIVAR SSG. Furthermore, scientifically qualified nominations should be encouraged in support of gender and geographical balance as required by the WCRP, and where appropriate to promote opportunities for scientifically qualified early career scientists and researchers from developing countries to participate in CLIVAR activities.

Details on the terms of reference and actions of the CLIVAR panels are provided on the CLIVAR website at [www.clivar.org](http://www.clivar.org). Members serve initial terms of three years, with a possible two-year extension.

To be considered for a particular panel membership, please download the form from [\[weblink\]](#) and submit it to [icpo@clivar.org](mailto:icpo@clivar.org). Equally, if you would like to nominate another individual, we would be happy to hear from you.

## **APPENDIX 2    WCRP Reports**

WCRP guidelines: <https://www.wcrp-climate.org/cr-publications/wcrp-pub-layout>

Cover template:

<https://drive.google.com/a/clivar.org/file/d/0B0FLotRq3PZCNHVwNDRNNFYtaFU/view?usp=sharing>

## **APPENDIX 3 Panel/Research Foci Report to CLIVAR SSG**

### **Report to CLIVAR SSG**

Panel or Research Foci:

Contributions to developing CLIVAR science and fit, where appropriate, to the CLIVAR imperatives

Cooperation with other WCRP projects, outside bodies (e.g. IGBP) and links to applications

Workshops/meetings held

New activities being planned, including timeline

Workshops / meetings planned

Issues for the SSG

## **APPENDIX 4 Meeting Proposal Form**

### **Form for CLIVAR Panel and Research Foci Requests for SSG Approval for Meetings**

Requests should be made through ICPO-ED ([icpo@clivar.org](mailto:icpo@clivar.org)), using the following headings:

- 1) Panel or WG
- 2) Title of meeting or workshop
- 3) Proposed venue
- 4) Proposed dates
- 5) Proposed attendees, including likely number
- 6) Rationale, motivation and justification, including relevance to CLIVAR themes and JSC cross cutting topics, and any cross-panel/WG links and interactions involved
- 7) Specific objectives and key agenda items
- 8) Anticipated outcomes (deliverables)
- 9) Format
- 10) Science Organising Committee (if relevant)
- 11) Local Organising Committee (if relevant)
- 12) Proposed funding sources and anticipated funding requested from WCRP

## **APPENDIX 5    Email to panel members attending Panel meetings**

*Dear [Panel] members*

*As you are aware, the next [Panel] meeting is schedule for [enter meeting dates, place, website]. International funds available for this meeting are very limited; we therefore encourage members to secure at least partial support from their institution or government towards the cost of attending the meeting.*

*However, if you require WCRP funds to support your participation at the above meeting, then please provide the following information to me by **[enter date]**.*

*Airport of departure:*

*Level of support: full/partial*

*If partial, what part is requested: flights/per diem*

*You will then be contacted by the WCRP secretary, who will initiate the WMO travel procedures.*

*Panel members from the US will be contacted by Jill Reisdorf (reisdorf@ucar.edu) directly to discuss travel support and procedures.*

*Regards,*

*[Enter Name]*



## APPENDIX 6    Email invitation to Panel meetings

Dear *[Enter Name]*

On behalf of the *[Panel]* co-chairs, I would like to invite you to attend the *[enter meeting title, dates, place, website]*

International funds available for this meeting are very limited, therefore please make every effort to garner support from your institution or government.

However, if you would like to request WCRP funds to financially support your participation at the above meeting, then please provide the following information to me by ***[enter date]***.

Airport of departure:

Level of support: full/partial

If partial, what part is requested: flights/per diem

You will then be contacted by the WCRP secretary, who will initiate the WMO travel procedures.

Regards,

*[Enter Name]*







26 October 2017

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**Information circular\***

To: Members of the staff

From: The Under-Secretary-General for Management

Subject: **Official travel**

**Amendment**

In order to implement the revised rates for terminal expenses, which have been recently approved, effective 1 December 2017, paragraphs 6 and 7 of information circular *ST/IC/2001/43* are replaced by the following:

6. Staff members are reimbursed terminal expenses for each required trip by means of public conveyance between the airport or other point of arrival or departure and the hotel or other place of dwelling in accordance with section 8 of the instruction. For New York, the amounts to be reimbursed for each such trip are \$78 in respect of the staff member and \$26 for each family member authorized to travel at United Nations expense. For all other duty stations, the amounts to be reimbursed for each trip are \$47 in respect of the staff member and \$16 for each family member authorized to travel at United Nations expense.

7. When an official United Nations or government vehicle is made available for the trip, the amounts to be reimbursed shall be set at \$14 in respect of the staff member and \$7 for each family member.

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\* The present circular will be in effect until further notice.

17-18967 (E) 301017



Please recycle A small graphic of a recycling symbol consisting of three chasing arrows forming a triangle.



**APPENDIX 10 Letter of Undertaking**

*(Note: to be on requesting organization's letterhead. Original of letter to be sent to WMO; this is a condition for release of funds)*

Our ref.: Mr/Ms/Dr (WMO Secretariat Director responsible)  
 World Meteorological Organization  
 7bis Avenue de la Paix  
 CH-1211 Geneva 2  
 Switzerland

(Date)

Dear Mr/Ms/Dr (WMO Secretariat Director responsible),

**(Paragraph(s), explaining purpose and amount of financial support).**

Subject to availability of funds, (name of requesting organization) undertakes to take the following actions within three months of the conclusion of (name of the event for which the support is requested):

1. To use the funds for the purpose(s) for which they will be provided;
2. To submit a statement of expenditure to WMO, with original receipts or certified copies thereof, signed by the (Chief Financial Officer or his/her designate by ( date) ); and
3. To return any unspent funds to following WMO bank accounts: **(please take the a/c which correspond to the amount to be paid)**

Account name:	World Meteorological Organization		
If returning:	account number is:	or IBAN is:	
--- Swiss	240-C0191516.0	CH56 0024 0240	
--- US	240-C0191516.1	CH29 0024 0240	
Bank name and address :	UBS, Case postale 2770, CH-1211 Geneva 2, Switzerland		
Swift code:	UBSWCHZH12 A	UBSWCHZH80 A	

Please find below full details of the bank account into which the WMO contribution should be paid (Note: should be account of organization, not individual):

Yours sincerely,

*(Name of Requesting Organization's officer)*

(Title)

## APPENDIX 11 Request for Financial Assistance Form

WEATHER CLIMATE WATER



WORLD  
METEOROLOGICAL  
ORGANIZATION

# REQUEST FOR FINANCIAL ASSISTANCE

Title of the meeting, Venue and Time

**70051 – WCRP/RES**

**PLEASE READ CAREFULLY THE INSTRUCTIONS FOR THE USE OF THIS FORM PROVIDED ON PAGE 3 AND RETURN IT, WITH A COPY OF YOUR PASSPORT, BEFORE: 9 January 2017**

**To the secretary responsible for the meeting: Pepi Potter; jpotter@wmo.int**

### 1. PARTICIPANT

Please complete the following form by typing the following **MANDATORY** information as it appears in your passport (no handwriting):

Gender	Male <input type="checkbox"/> Female <input type="checkbox"/>		
FAMILY NAME			
MAIDEN NAME (if applicable)			
First Name			
Nationality			
Place of birth		Date of birth (DD/MM/YY)	
Passport number		Validity (DD/MM/YY)	
Holding US visa	Yes <input type="checkbox"/> No <input type="checkbox"/> Not applicable <input type="checkbox"/>		
Schengen visa	Yes <input type="checkbox"/> No <input type="checkbox"/> Not applicable <input type="checkbox"/>		
Address			
City		Postal code	
Country			
Mobile phone number		Office phone number	
E-mail address			

### 2. ASSISTANCE FROM WMO FOR TRAVEL

#### Request

Assistance requested:  yes  no

Once you receive a proposed itinerary from the WMO travel agency, please confirm it and send it to the WMO secretary responsible for the meeting.

**Please check that the e-mail you receive clearly states that it is an “ELECTRONIC TICKET”. If not, it is most probably an itinerary waiting for your confirmation.**

**3. ASSISTANCE FROM WMO FOR DAILY SUBSISTENCE ALLOWANCE (DSA)**

To request DSA, please provide the following information.

Allowable DSA, Terminal Expenses and other refundable expenses will be transferred to you in advance of the meeting, provided that your request has been received before the deadline indicated on page 1 of this form.

**3.1 Request**

Assistance requested:  yes  no

**3.2 Payment procedure**

(i) Preferred payment method is by **bank transfer**. Please indicate full bank details:

Name of the bank:			
Address:			
Name of account holder			
Account number		Currency of account	
SWIFT Code			
ABA Code (USA)			
SORT Code (UK)			
IBAN Code (Europe except UK)			

- (ii) Through UNDP Office
- (iii) Payment by Swiss Bankers Card (CHF) for use in Switzerland
- (iv) Payment by reloading of existing Swiss Bankers Card in my possession (CHF)

**4. INFORMATION ON SUPPORT RECEIVED IN ADDITION TO WMO ASSISTANCE**

**4.1 Declaration**

No additional support received  OR Additional support received

**4.2 Information**

In case additional support is received, please indicate type of funding (e.g. ticket, subsistence allowance, accommodation, meals, local transportation) and estimated value:

.....

.....

.....

.....

.....

.....

**5. APPLICABLE RULES AND INSTRUCTIONS**



The travel shall be conducted in accordance with relevant WMO rules and instructions. An excerpt of these is provided in the APPENDIX to this form. Please read it carefully.

By signing this form, I confirm that the information provided in this form is correct to the best of my knowledge and that I shall comply with the relevant WMO rules and instructions.

**Signature of the participant:** ..... **Date:** .....

## APPENDIX

### EXCERPT from applicable rules and instructions

Please note that, as per WMO travel rules, air travel shall be provided in economy class, for the most direct and economical route.

Please note that if you are unable to travel after the ticket has been issued, you must inform the airline company at least 2 hours prior to departure to ensure that the ticket will be reimbursed. **Failure to do so will mean you are declared as a “no show” passenger and the cost of the ticket will not be reimbursed.** Please also **inform the secretary responsible for the meeting,** as soon as you cancel your travel.

It is your responsibility to obtain all necessary visas (for transits and final destination) prior to departure.

Evidence of travel (original of boarding passes for air travel or hotel bill when travel has been undertaken by train or car) must be submitted to the WMO secretary responsible for the meeting within 16 calendar days after completion of travel. Failure to do so will result in recovery of DSA and of other advance payments made by the WMO.

You may choose to purchase the airline ticket yourself. In this case, please inform the travel agency and the secretary responsible for the meeting. However please note the following:

- Tickets purchased below the financial limit provided by the WMO proposal will be reimbursed up to the actual cost incurred by the traveller and only up to this limit;
- The invoice or e-receipt relating to the self-purchased ticket needs to be provided to the WMO **before any refund can be processed** and must show the name of the provider, the name of the clients, ticket number and form of payment accompanied by the WMO travel agency proposal.
- Traveller should not purchase an air ticket before obtaining the official WMO travel agency proposal. A ticket purchased prior to obtaining the official proposal may not be reimbursed by the Secretariat.
- In case you are unable to travel, the WMO **shall not reimburse** the cost of self-purchased tickets.

### INSTRUCTIONS for the use of this form

- Please complete this form in block letters **by typing only** (no handwriting) and return it together with a copy of your passport to the secretary responsible for the meeting, as indicated on page 1 of this form.

To allow for the timely processing of the travel authorization and the transfer of DSA and other refundable expenses, this form must be received within the deadline indicated

## APPENDIX 12 Example of Travel Authorisation Form



World Meteorological Organization  
Organisation météorologique mondiale

Secrétariat  
7 bis, avenue de la Paix – Case postale 2300 – CH 1211 Genève 2 – Suisse  
Tél.: +41 (0) 22 730 81 11 – Fax: +41 (0) 22 730 81 81  
wmo@wmo.int – www.wmo.int

TEMPS • CLIMAT • EAU  
WEATHER • CLIMATE • WATER

### TRAVEL AUTHORIZATION

### AUTORISATION DE VOYAGE

APPROVED: 20-JUN-16  
By: CUÑADO, Ms. Katia

20139371 - WCRP

**CHAKRABORTY, Mr Kunal**  
**INDIAN NATIONAL CENTRE FOR OCEAN**  
**INFORMATION SERVICES**  
**500090 HYDERABAD**  
**India**

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CHAKRABORTY Kunal, Expert to attend a planned meeting - CLIVAR Open Science Conference, Early Career Scientists Symposium, CLIVAR Panel meetings and CLIVAR SSG meeting, Qingdao, China, 17-25/9/2016 - MF 70251  
Reduced DSA: US \$75 (student rate at cheaper hotel) - maximum 9 days. No during travel. Reduced TERs: US \$100. MF 70251  
Trv; CHAKRABORTY K.; Qingdao, China, 17-25Sep16 -mf70251

Supplier: CHAKRABORTY, Mr Kunal (USD MANUAL)

PO Num	Type	Description	Quantity	Unit Price	Currency	Amount in Currency	Rate	Total CHF
178828	DSA	DSA: CHAKRABORTY Kunal, Qingdao	9.0	75.00	USD	675.00	0.97	652.73
178828	Registration fee	Registration fees: CHAKRABORTY Kunal, Qingdao	1.0	338.22	USD	338.22	0.97	327.06
178828	TER	TER: CHAKRABORTY Kunal, Qingdao	1.0	100.00	USD	100.00	0.97	96.70
<b>Sub-total:</b>						<b>1,113.22</b>		<b>1,076.48</b>

Supplier: CWT Carlson Wagonlit Travel (CHF MANUAL)

PO Num	Type	Description	Quantity	Unit Price	Currency	Amount in Currency	Rate	Total CHF
178827	Ticket	Ticket: CHAKRABORTY Kunal, Qingdao	1.0	688.20	CHF	688.20		688.20

Type	Budget Line	Total in Currency	Currency	Total CHF
Ticket	410400-5-516-0-70251-54106-16	688.20	CHF	688.20
DSA	410400-5-516-0-70251-54106-16	675.00	USD	652.73
TER	410400-5-516-0-70251-54106-16	100.00	USD	96.70
Registration fee	410400-5-516-0-70251-54106-16	338.22	USD	327.06

## APPENDIX 13 WCRP Ticket Purchasing Guidelines

The WMO secretary responsible for the meeting will communicate to WMO travel agency all necessary information provided by the traveller in the RFA form (APPENDIX 11). The traveller will then be contacted by WMO travel agency with a travel itinerary based on the WMO travel policy and the dates and place of meeting. Upon receipt of this proposal, the traveller is requested to choose one of the three options below:

- 1) Accept the travel proposal by returning a written acceptance to the travel agency with copy to the WMO secretary responsible for the meeting; or,
- 2) Request a modification of the itinerary proposed by the travel agency according to his/her personal needs, with the understanding that the WMO financial responsibility will be based on the original proposal provided by the travel agency and that the cost difference, if any, will be borne by the traveller; or,
- 3) Refuse in writing. the travel agency's proposal and self-purchase his/her ticket. The reimbursement of this ticket will be processed after the meeting, upon submission of a travel claim accompanied by the ticket invoice/receipt, boarding passes. The original CWT proposal will serve as the maximum WMO financial ceiling for reimbursement.

In case of **self-purchased ticket (option3)**, the following additional rules will apply:

- Tickets purchased below the financial limit provided by the WMO proposal will be reimbursed up to the actual cost incurred by the traveller and only up to this limit;
- Reimbursement of self-purchased tickets will be processed only after the meeting and upon submission of related invoice or e-receipt indicating the name of the provider, the name of the traveller, the ticket number and the form of payment accompanied by the WMO travel agency proposal.
- Traveller should not purchase an air ticket before obtaining the official WMO travel agency proposal. A ticket purchased prior to obtaining the official proposal may not be reimbursed by the Secretariat.
- In case you are unable to travel, WMO shall not reimburse the cost of self-purchased tickets.

In general, airlines booking are legally held up to 24 hours, and the deadline for ticket issuance will be notified by the travel agency on their proposal. It is the responsibility of the traveller to reply to the travel agency within the time frame, otherwise the traveller will have to contact the official travel agency to reactivate his/her booking.

Travelers should note that obtaining all necessary visas (for transits and final destination) prior to departure remains under their responsibility.

## APPENDIX 14 Lump-sum Payment

1. Participants may be paid a lump-sum covering all travel expenses, which include ticket, per diem and terminal expenses, or covering per diem and terminal expenses only (payment of terminal expenses is not obligatory). In both cases, the amount of the lump-sum must not exceed **90% of the traveller's entitlement** under WMO travel rules, which includes: 1) **Per Diem** = UN DSA rate \* (meeting days+1); 2) **upper limit for tickets** should always be based on the proposal from WMO travel agent (CWT); and 3) **terminal expenses** should be based on [APPENDIX 9](#).
2. The **WCRP Funding Request Form** ([APPENDIX 7](#)) is still needed, as WCRP have to indicate the exact amount of per diem, tickets and other expenses when preparing the Travel Authorisation ([APPENDIX 12](#)) for each participant. There should be a **separate column entitled "Lump-sum payment"** with the amount to be paid to the participants in this form.
3. For the **ticket**, CWT will still send a proposed itinerary which the **participant should refuse** because under normal circumstances, funds for purchasing the air ticket would be included in the lump-sum. However, anyone cannot stop the participants to refuse the CWT proposal. Thus, it is important to communicate clearly to the participants at the very beginning for the **lump-sum payment modality** and the **allocated amount**. *However, in the RFA form ([APPENDIX 11](#)) sending to participants, it states that the participants, when self-purchasing tickets, will only be reimbursed up to the CWT proposal (which is always higher than the upper limit of tickets allocated to participants) and this could cause confusion to participants.*
4. Documents required from participants paid by lump-sum would be the same as for a normal TA, i.e. **copy of air ticket invoice and boarding passes**.
5. Participants should take care of the tickets purchasing, hotel booking and payment by themselves when to be processed with lump-sum payment.

**APPENDIX 15 Meeting Table**

**Travel Request Template**

*Find in ICPO folder*

## **APPENDIX 16 Template for Annual Reports on Endorsed Projects**

- 1 Project Title
- 2 Date Endorsed
- 3 Principle Investigators
- 4 Countries Involved
- 5 Supporting agencies and financial implications for CLIVAR/WCRP, if any
- 6 Organisation
- 7 Project start date
- 8 Project end date
- 9 Objectives and relevance to CLIVAR/WCRP
- 10 Planned activities
- 11 Accomplishments including interactions with CLIVAR projects
- 12 Data, both modelling and observational, produced and accessibility
- 13 Documents generated (e.g., publications, meeting reports, etc.)
- 14 Writer of reports personal perspective on achievements (or lack of) of endorsed project
- 15 Future activities

## APPENDIX 17 Resume Form

### Nomination for Appointment/Extension as a Member of a CLIVAR Group or Panel

Year membership would begin/ be extended:

*Please complete this form and send it to the ICPO (icpo@clivar.org)*

#### DETAILS OF CANDIDATE NOMINATED

Nominated for: **PLEASE INSERT PANEL NAME HERE**

Title:

First Name:

Last Name:

Year of birth:

Gender:

Institution:

Postal address:

Country:

Nationality:

Languages:

E-mail Address:

Tel.:

Fax:

Nominee's professional homepage or website:

Academic Background (maximum of 8 lines):

Positions held (maximum of 8 lines):

Expertise (maximum of 8 lines):

Why is this individual particularly suited to this SSG or WG? (maximum of 5 lines)

Latest publications (maximum of 1 page):

Submitted by \_\_\_\_\_

Title:

First Name:



*Last Name:*  
*Organization:*