

## REGIONAL COURSE GUIDELINES

### Course Objectives

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- Further the global exchange of spine deformity knowledge
- Offer continuing education to surgeons who may find it difficult or impossible to attend the SRS annual meeting or IMAST because of cost, travel restraints, or Visa issues
- Strengthen the international community of spine deformity surgeons
- Strengthen the relation between SRS and different spine societies around the world
- Generate global interest in the SRS, its programs, mission and membership

### Course Structure

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#### *General Considerations*

- Must be an SRS course, under SRS control
- It should be held in conjunction with and to precede a local Spine or Orthopedic meeting.
- Under special situation, course can be a part of a major organization meeting, but still it would be under SRS control.
- Under special circumstances, such as countries where local meetings are not regularly conducted or countries with multiple conflicting spine organizations then courses might be stand-alone. In all cases, SRS will maintain control over all aspects of the course.
- Emphasis should be on education, and not on social events or tourist activities.
- Courses should rotate between the four regions specified by the board (Latin America, Africa and middle east, Asia, and East Europe)

#### *Application process*

- Course should be proposed by at least one SRS member and a prominent local spine surgeon (both will function later as course chair)
- WW course committee might, if needed, assign one of the committee members to act as liaison between the organizing committee and WW course committee. The liaison function is to facilitate communication with WWC committee, SRS officers, and staff
- A completed proposal form should be submitted to WW course committee at least two years in advance of the proposed date
- The completed form should include names of the organizing committee and tentative faculty and should be approved by WW course committee
- Course program and faculty will be approved by WW course committee and then submitted to the Educational Council for approval to provide better coordination and to avoid conflicts with any other educational activities.
- Ideal size of the organizing committee is not to exceed 6 persons, of which half should be SRS members. Preferably, they should be from the region of the course and will be members of the course faculty.  
If possible, one of the organizing committee should be an SRS officer or board member
- Responsibilities of the organizing committee (also see “**Management**”)
  - ✓ Assist with selection of meeting venue
  - ✓ Develop scientific program, working with SRS office for review of abstracts, correspondence with faculty, etc.
  - ✓ Assist with locating and soliciting commercial exhibitors and sponsors
  - ✓ Assist with promotion of course by providing or helping to obtain local or regional mailing lists, working with local instrumentation companies, etc
  - ✓ Responsibilities and duties of each member of the Organizing Committee should be clearly outlined in the course proposal

### ***Length***

- Suggested length for a course is 2 – 2.5 days
- Suggested length for courses held as a part of other meetings is 1 - 1.5 days

### ***Course Content, Topics***

- Content and topics should be spinal deformity, with consideration given to the expected audience, i.e., the level of training in that area, type of problems most commonly seen, etc.
- Courses should be a combined and mutual educational experience for local and visiting faculty, therefore capable local faculty should always be included and a separate time, when it is possible, should be allocated for attendees to present and discuss cases
- A combination of invited lectures, case discussions, free papers and workshops works well for longer courses.
- In addition to providing valuable education, industry sponsored workshops can help pay for expenses such as faculty travel, meeting room rental and audiovisual costs.
- Traditional and E-Posters may also be presented, depending on space availability, number of abstract submissions and budget.

### ***Invited Faculty***

- Efforts should be made to include local faculty, where possible, as well as appropriate invited faculty from other regions. Strong preference should be given to using SRS members.
- For financial purposes and ease of planning, faculty invited from outside the local area should be limited to 6 people. These should be chosen only after the companies have put their requests in to the organizing committee.
- No compensation or honoraria will be paid to faculty or organizing committees.
- Faculty reimbursable expenses:
  - Travel expenses: airfare will be limited to coach class for regional travel (same continent) or business class (with a pre-defined limit based on course location) for transoceanic. Reservation and ticketing must be cleared by SRS office staff since they may be able to get better offers.
  - Ground transportation to and from airports should be based on the least expensive means (e.g. taxi not limousine)
  - Hotel rooms, which must be reserved by SRS office
  - Meals (which are not a part of the course program) shouldn't exceed \$120 per day
  - Receipts are requested for any reimbursement
  - These reimbursement guideline would be reviewed every five years

### ***Workshops***

- Suggest a maximum of four concurrent workshops in any one-time slot.
- Grants to support workshops should be obtained prior to scheduling faculty or advertising workshops. Suggested fee for workshop support: \$15,000.
- Companies, which support workshops, will be given an opportunity to suggest faculty and topics.

### **Management**

#### ***Financial***

- In keeping with SRS fiscal policies, SRS office will maintain control of all finances, including receiving all income, paying invoices, and accounting.
- Every effort should be made to control expenses and obtain exhibits and/or educational grants in order to offer the lowest possible registration fees.

- It is not the purpose of these courses to generate profits for SRS, but they should be structured and budgeted to avoid losing money.
- Emphasis should be on education. Any social events should be structured for networking and expenses should be covered by local grants, not by registration fees or education grants.

#### ***Exhibit, sponsor guidelines and agreements***

- Advice, suggestions and assistance from the local organizing committee and/or a selected Destination Management Company (“DMC”) or Professional Conference Organizer (“PCO”) will be solicited and welcomed, but contracts/written agreements for exhibits and/or educational grants must be reviewed and signed by the SRS Executive Director or the President or Treasurer of the SRS. This is necessary in order to follow SRS financial policies and to coordinate overall corporate support programs within SRS.
- All exhibit fees and educational grants will be paid directly to SRS through the central office.
- Local organizers should help with locating and soliciting local exhibitors and/or sponsors.

#### ***Registration***

- Registrations will be taken by the SRS office in Milwaukee, with all fees paid to SRS.
- Registration fees should be structured to offset per-person expenses as much as possible, but it must be affordable for area physicians, including young surgeons.

#### ***Meeting and hotel arrangements***

- All contracts for hotels or other venues shall be with SRS and must be reviewed and signed by the SRS Executive Director or the President or Treasurer of the SRS.
- Advice, suggestions and assistance from the local organizing committee and/or a selected Destination Management Company or Professional Conference Organizer will be solicited and welcomed, but final decisions and arrangements will be made by SRS Staff. This is in accordance with SRS written policies and is necessary since SRS is the sponsoring organization responsible for payment and adhering to contracts.

#### ***Faculty correspondence***

- Faculty and speaker correspondence will be approved by the Organizing Committee, but generated from the SRS central office. Responses will be maintained by SRS staff.

#### ***Course Materials***

- SRS Staff at the central office in Milwaukee will be responsible for developing course materials such as the final program or syllabus. Whenever possible, actual printing will be done at the meeting location (with assistance from the local organizers and/or a local DMC) in order to save on printing and shipping costs.
- Invited faculty will be asked to commit to provide written handouts at the same time as they agree to participate in the course. Deadline for submitting handouts will be decided long in advance and faculty has to respect this deadline. Faculty participation might be canceled if handout is not submitted before the deadline. Handout guidelines will be developed by course chairs and the organizing committee.

#### ***Advertising and Promotion***

- SRS staff will work with the organizing committee and/or a local DMC to develop a promotional plan and materials.
- Whenever possible, course advertising and promotion will be coordinated with advertising and promotion of other SRS events, such as the Annual Meeting, IMAST, etc.

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