

REGIONAL COURSE GUIDELINES

Course Objectives

The goals of SRS Worldwide Conferences are to:

- 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

General Considerations

- Courses must remain an SRS course, under SRS control
- Courses should be held in conjunction with or precede a local Spine or Orthopedic meeting.
- Under special circumstances, courses can be a part of a major organization meeting, but must still remain under SRS control.
- Under special circumstances, (i.e, courses held in countries where local meetings are not regularly conducted or countries with multiple conflicting spine organizations) courses may be stand-alone. In all cases, SRS will maintain control over all aspects of the course.
- Emphasis of the course should be on education, and not on social events or tourist activities.
- Courses locations should rotate between the four regions specified by the SRS Board of Directors (middle and Latin America, Africa and Middle East, Asia, and Europe).

Application process

- Courses should be proposed by at least one SRS member and a prominent local spine surgeon (both will function later as course chair).
- The Worldwide Conference (WWC) Committee might, if needed, assign one of the committee members to act as liaison between the organizing committee and committee. The liaison's function is to facilitate communication with the WWC committee, SRS officers, and staff.
- A completed proposal form should be submitted to the WWC Committee, preferably two years in advance of the proposed course date.
- The completed form should include names of the organizing committee and tentative faculty.
- The course program and faculty must be approved by the WWC Committee, then submitted to the Education Council for approval to best facilitate coordination with and to avoid conflicts with any other educational activities.
- Ideally, the organizing committee should consist of approximately six persons. Half of them should be, if possible, SRS members from the region where the course will be held, and would also preferably be members of the course faculty.
- At least one member of the organizing committee, chairman of the course, or one of the faculty should be an SRS officer or Board member.
- Responsibilities of the organizing committee (also see "Management")
 - ✓ Assist with selection of meeting venue;
 - ✓ Develop the scientific program, working with SRS staff for review of abstracts, correspondence with faculty, etc.;
 - ✓ Assist with locating and soliciting commercial exhibitors and sponsors;
 - ✓ Assist with promotion of the 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/conference is 1.5 days to precede the local meeting, but under certain circumstances, the course can extend as long as 2-2.5 days.
- The course/symposium can be in the form of a half-day of SRS programming, as a part of the local meeting/international congress etc.

Course Content, Topics

- Content and topics should include pediatric and adult 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 in the conference. When possible, time 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.

The committee might be asked, routinely or occasionally, to organize a symposium or an instructional course lecture to be conducted during SRS annual meeting. This function will consist of some of the talks which were presented in WW courses during the year prior to the annual meeting. The choice of these selected talks will be carried on by the committee in consultation with courses' chairpersons. These talks should be related to different conditions or unique managements, which is specific to the local region of the courses. Other important talks could be decided even if they were not presented at any course. The committee might, at its own discretion, waive the registration fees to the annual meeting for the invited speakers who are not SRS members

Invited Faculty

There are two types of faculty: SRS Sponsored Faculty and Volunteer Faculty

SRS Sponsored Faculty

- Efforts should be made to include local/regional faculty. Faculty from other regions should also be considered. Strong preference should be given to SRS members.
- For financial purposes and ease of planning, faculty from outside the local region, whose expenses are sponsored by SRS, should not exceed four people, plus one from the SRS presidential line.
- Efforts should be made to include faculty suggested by the local hosts, including at least two from outside the US (one from the region of the course) and three from the US.
- Course chairs should attempt to offer faculty opportunities to a variety of members and, if possible, avoid using the same faculty for different courses in the same year.
- No compensation or honoraria will be paid to faculty or organizing committees.
- If requested by local organizers, faculty members should make an effort to stay or arrive early in order to speak during the spine or orthopedic meeting that is hosting the WWC.
- Faculty reimbursable expenses include:
 - 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 travel. Reservations and ticketing must be approved by the 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 in coordination with the local host.

- Meals (which are not a part of the course program) shouldn't exceed \$100 per day.
- Receipts are required for any reimbursement.
- These reimbursement guidelines should be reviewed every five years.

Volunteer Faculty

- Volunteer faculty members are those who volunteer to attend a WWC and participate as faculty.
- SRS will not reimburse expenses for volunteer faculty members.
- SRS strongly encourages its members to volunteer as faculty for WW conferences.
- Travel expenses will be covered by the volunteer faculty but local accommodations and any registration fees should be provided by the local society that is hosting the WWC.
- All SRS members may apply to serve as volunteer faculty for announced courses. Selection of volunteer faculty will be at the discretion of the organizing committee and the WWC Committee.
- If requested by local organizers, faculty members should make an effort to stay or arrive early in order to speak during the spine or orthopedic meeting that is hosting the WWC.

SRS

Workshops

- The WWC Committee suggests 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 is a minimum of \$7500.
- Companies that support workshops will be given an opportunity to choose faculty and topics for their own workshops; preferably, they will choose their faculty from the already planned faculty for the course. They will be responsible of the cost for any extra faculty they wish to invite.

Management

Financial

- In keeping with SRS fiscal policies and to control expenses, the SRS office will cover traveling expenses for 2-4 faculty members and one staff member (this will be negotiated with the local host organization). The faculty could be from the countries of the geographic region or from outside the region but the total faculty, whose traveling cost is covered by SRS, will not exceed the total of four. The choice of the faculty is the function of course chairs and the local organizing committee
- SRS will have full rights to seek funds from Corporate Partners to cover SRS financial responsibility for the course.
- All local faculty expenses (hotel, transportation, social events etc) will be the responsibility of the local host organization.
- Should the local host organization wish to invite more faculty members, it is free to do so but it will be responsible of their expenses.
- Should other SRS members (beyond the sponsored faculty) wish to be included as faculty, their names will be submitted to the organizing committee, and upon approval as faculty, they will be responsible of their own expenses.
- Every effort should be made by the organizing committee to control expenses and obtain exhibits and/or educational grants in order to offer the lowest possible registration fees. The goal is to have the course accessible to the largest number of attendees.
- It is not the purpose of these courses to generate profits for SRS, but they should be structured and budgeted to avoid financial losses.
- Emphasis of the course should be on education. Any social events should be structured for networking and expenses should be covered by local 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 which include any financial responsibilities for SRS 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 educational grants, which are secured from the industry corporate offices, will be paid directly to SRS through the central office.
- The local organizing committee may locate and solicit local exhibitors and/or sponsors to help with general expenses, such as meeting space rental, coffee breaks, and faculty housing.

Registration

- Registrations will be collected by the local host organization, which will manage all the logistics of registration, printing and distribution of any syllabus and or educational material.
- Registration fees should be structured to offset per-person expenses as much as possible, but they must remain affordable for area physicians, including young surgeons.
- A copy of the attendee list, with email addresses, shall be sent to the SRS office after the course.

Meeting and hotel arrangements

- All contracts for hotels or other venues (meeting halls, meals, etc) shall be the responsibility of the local host organization, SRS office should be kept apprised of all arrangements in a timely fashion.
- SRS office will be kept informed, in a timely fashion, of all local arrangements for the sponsored faculty (hotel rooms, transportation, airport receiving etc).

Faculty correspondence

- Faculty and speakers 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 in association with course chairmen and organizing committee. 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 must 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.
- A participant survey prepared by the SRS office should be distributed and completed by participants to obtain feedback regarding each course. If possible, surveys should be translated into the local language in areas where English is not widely spoken.

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.