

## Guidelines for Course Directors

**ISUOG's Strategic Goal:** To ensure comprehensive, innovative, clinically focused education programs

In agreeing to chair an ISUOG intensive course, Course Director/s agree to work within the following guidelines for course implementation.

### 1. Overview

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The Course Director/s commit/s to working with ISUOG to produce the highest quality educational program aimed at enhancing delegates' knowledge and improving clinical practice standards.

Each course will have at least one Course Director, who agree to work to the terms described in this guidance and to work with the Secretariat to meet deadlines and ensure the successful promotion and running of the event.

### 2. Appendixes

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There are four appendixes at the end of this document:

Appendix 1: ISUOG's Speaker expenses policy

Appendix 2: Expenses claim form

Appendix 3: Timelines, roles and responsibilities

Appendix 4: CME requirements

### 3. Financial considerations

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#### 2.1 Budgets

ISUOG will set a fixed budget for the event, taking into account anticipated attendance numbers. Budgets are set with an expectation of a minimum of 80 onsite and 80 live stream delegates. Course directors commit to support ISUOG in promoting the meeting. The budget will allow for:

- Venue costs (including AV)
- Catering costs
- Marketing costs
- Office costs (including staffing)
- Speaker allowance to include:
  - o *Honoraria if desired and up to a total maximum: £3,600*
  - o *Travel and accommodation in line with the speaker entitlements policy and up to a total maximum: £1,000*

In agreeing to chair an ISUOG course, Course Directors must agree to work with the Secretariat in accordance with these outlined budgets.

#### 2.2 Faculty specifications

Each event will have a total budget for travel, accommodation and honoraria for invited faculty in respect of fulfilment of the speaker requirements such as onsite delivery, support of CME endeavours (clause 2.4), and provision of the required learning objectives and MCQ's.

Total travel and honoraria budgets are set based on a recommended total number of five (5) speakers and up to two (2) Course Directors per two (2) day course, and one (1) director and up to three (3) speakers for a one (1) day course. Exceptions to this must be pre agreed and managed within the budgets. The honorarium per speaker is calculated on the number involvement as specified on the final printed program.

Course Directors have flexibility to vary the number of speakers in line with their topic and goals. However, the overall budget allocation will not be increased where more speakers are included. In these instances Directors have often asked local speakers to donate their time.

#### 2.3 Faculty invitations and entitlements

Invitations will be managed by the Secretariat once agreed by the Course Directors in line with this guidance.

Entitlements are defined as follows:

- 2.3.1 **Accommodation** is provided for speakers in line with ISUOG's Speaker expenses policy (see Appendix 1). ISUOG will cover one (1) night accommodation per speaker per day of involvement at an ISUOG approved hotel for up to four (4) speakers for a one day course and seven (7) speakers for a two day course. Additional discretionary nights to accommodate long distance travel requirements may be agreed by arrangement with the ISUOG Secretariat.
- 2.3.2 **Flights/Travel** ISUOG will cover flights/travel up to three (3) regional speakers (e.g. within Australia for an Australian courses) for a one day course and up to five (5) regional speakers for a two day course. Tickets' class, distance and budget must be in line with the prevailing ISUOG travel policy at that time of booking. Exceptions may be made, for example if covered through independent sponsorship but these must be agreed by the ISUOG Secretariat.
- 2.3.3 **Honoraria:** Speakers (excluding Course Directors) specified on the program will receive an honoraria equivalent to £100 per person per hour of lectures after the submission of their learning objectives (LOs) and multiple choice questions (MCQs). The overall maximum budget for honoraria including chairs is £1,800 per day. Payment of honoraria is subject to fulfilment of clause 2.4.

## 2.4 Program requirements

- 2.4.1 By accepting to chair an ISUOG course, the Course Director agrees to work to the specified timelines and requirements of this document, unless otherwise specifically agreed with the Secretariat.
- 2.4.2 Speakers are required to provide LOs and MCQs for each of their presentations for review by ISUOG, to support growth of ISUOG's CME online learning platform.
- 2.4.3 It is the responsibility of the Course Director(s) to review the MCQs and LOs provided by the speakers for suitability for use in online CME accreditation.

## 2.5 Special provisions

Special provisions need to be agreed by both parties and will appear in the Special provisions section of the MoU.

## 2.6 Courses at the ISUOG headquarters on Freston Road

Courses run at Freston Road are subject to maximum delegate numbers of 40 (theatre style) or 32 (classroom style) and are usually limited to 20-25 for hands on training. There is a maximum of two (2) breakout areas available.

## 3. Timelines, roles and responsibilities

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The organisation of a course requires the timely and effective co-ordination between the parties involved, as per appendix 2. ISUOG will aim to define its course program at least one year prior and no less than 6 months in advance.

The ISUOG Secretariat will undertake all administrative tasks to deliver the course with input on key program elements from Course Directors and any relevant committees.

## 4. MoU

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Any modifications to the MoU must be agreed by both parties and in writing.

The terms of this MoU are valid while the organisations collaborate and unless changed by mutual agreement as above. Both parties accept and agree to act on a good will basis. The MoU will become invalid if one of the parties acts in a manner contrary to the terms written above.

## **Appendix 1: ISUOG's Speaker expenses policy**

Interstate or International travel should be booked through the International Society for Ultrasound in Obstetrics and Gynecology (ISUOG)'s official travel agent *Corporate Traveller*. Please contact John Tillotson on [john.tillotson@corptraveller.co.uk](mailto:john.tillotson@corptraveller.co.uk) or 0208 712 0401.

Should travellers need to book their own tickets, they can request the appropriate budgets and expense claim forms. Claims must be made in accordance with the expenses policy and budgets indicated below.

All bookings should be made a minimum of 28 days in advance for train travel, and where possible 3 months in advance for air travel. All allowable expenses can be claimed on submission of the expenses claim form plus original receipts.

### **1. Air fares**

ISUOG will meet the following classes of air fare where pre-approved and applicable:

*Flights under 6 hours: Tourist/Economy*

*Flights over 6 hours: Premier Economy/Economy Plus, or, on routes where this is not available, lowest upgradeable economy fare is required.*

Whenever possible APEX (advance purchase) fares should be used to save expenses.

### **2. Rail fares – UK or Trans European travel**

- **Within UK or within Europe - First class rail travel:** Rail travel must be undertaken within the travel budget provided which will allow for APEX (advanced purchase) fares. These are available to book one month or more before travel but may for some routes restrict the traveller to travelling on the specific train that they book. Peak time travel is not restricted but lower price tickets sell out so it is best to book as far ahead as possible. Fully flexible first class tickets cannot be reimbursed in full. If this type of fare is booked ISUOG will reimburse up to the budget allocated. Any UK ISUOG member who regularly travels on Society business, and is over 60 years of age, should obtain a Senior Railcard to take advantage of the reduced fares.
- **Trans European Eurostar travel:** ISUOG covers Standard Premier class, semi-flexible tickets if booked at least 1 month in advance. If travel is booked within the month, only non-flexible standard premier tickets should be booked. **Fully flexible business fares cannot be reimbursed in full.** If these fares are chosen ISUOG will reimburse up to the total regional budget available for the route.

### **3. Car mileage**

The claim will be compared to the first class rail fare and the lower of the two amounts paid.

### **4. Congestion charging**

ISUOG is not within the congestion charging zone and will not normally refund congestion charges. It should be noted that reimbursed congestion fees are taxable for the recipient and with only a very small number of claimants who may be affected it was therefore felt simpler to adopt a policy that the Society does not reimburse these charges.

### **5. Subsistence expenses**

ISUOG will contribute up to a maximum of **£25.00** towards the cost of meals on trains if journey over 100 miles.

### **6. Incidental expenses**

ISUOG will contribute up to a maximum of **£50.00** towards the cost of airport transfers, parking and other miscellaneous expenses.

### **7. Overnight expenses**

ISUOG will contribute up to a maximum of **£150.00** towards the cost of accommodation and meals when you stay overnight in transit where this is pre-agreed.

### **8. Hotel**

**Please let the Events Team, [congress@isuog.org](mailto:congress@isuog.org), know whether you would like to book a hotel room.**

#### **a) Reservations:**

Rooms will be booked at a hotel chosen by the Society in London. If however there is no availability, rooms will be reserved on a first-come first-served basis at a hotel recommended by the Society.

The Society has arranged discounted rates at the local hotel and all bookings must be made through the ISUOG Office to take full advantage of these rates.

**b) Payment:**

***If staying at the Hotel chosen by the Society:***

ISUOG will pay directly for the room charge only (including breakfast and VAT) for all bookings made via the **Secretariat**. Please note that other expenses (i.e. telephone, newspapers, etc.) are the responsibility of the individual and will need to be paid when checking out.

***If no availability, and staying at a different hotel booked by ISUOG:***

All hotel bills must be settled by the individual concerned and reclaimed from ISUOG. ISUOG will pay the room charge only (including breakfast and VAT) but all other expenses are the responsibility of the individual and will not be reimbursed. A VAT invoice/receipt must be attached to the claim form to satisfy the Society's auditors.

**c) Other hotels / other destinations:**

You should inform the Events Team, [congress@isuog.org](mailto:congress@isuog.org), of your proposed destination and business in advance and in line with approved budgets. Should you decide to make your own hotel arrangements and not book into a recommended hotel, ISUOG will contribute a maximum of £135.00 per night towards your hotel and breakfast expenses.

**PLEASE NOTE:**

ISUOG's financial year-end is 31 December and all expense claims should be submitted prior to this date for the current year unless the activity being claimed is within two weeks of the year end. The Society CANNOT consider reimbursing expenses claimed more than 12 months after the event or meeting to which they relate.

**9. Honoraria**

ISUOG's education courses are delivered as part of the Society's aim to improve women's healthcare services through the provision and broad dissemination of the highest quality education and research information around ultrasound in obstetrics and gynecology. The contribution of volunteer invited faculty at these courses is invaluable and greatly appreciated by the ISUOG Board, Secretariat, Course Chairs and members.

As a token appreciation for our speakers' time, as well their contribution to ISUOG's CME platform through the provision of LOs and MCQs for their lectures, ISUOG will usually provide an honorarium payment to faculty members. The Society will also support travel, accommodation and subsistence expenses incurred as a result of participation (as per our travel policy above). Speakers at ISUOG courses are paid honoraria at the discretion of the chairs equivalent to approximately £100 per person per hour of lectures given (based on 7 hours of program per day). The overall total budget for honoraria is standardised for all ISUOG courses so amounts paid may be affected by program length and speaker numbers.

**10. Claiming expenses**

The following expenses claim form must be completed and returned to ISUOG along with any outstanding learning objectives and MCQs for your talk/s. All expense details should be summarised and accompanied by original receipts. Honoraria will be paid at the same time as your expenses via bank transfer.

## Appendix 2: Expenses claim form

This form must be returned with your expenses and accompanied by original receipts. Scanned receipts are not accepted. Electronic receipts, where this is the only document supplied, can be accepted if accompanied by an email declaration to confirm that the expenses were incurred in pursuit of ISUOG business and will not to be reclaimed from another body.

Please note that we are unable to refund over the budget levels given unless agreed in advance with the ISUOG Secretariat. Please book travel and accommodation early to gain the best possible fares and wherever possible no less than 28 days out.

**NAME:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**EVENT ATTENDED:** *Updates on Reproduction, Early Pregnancy, First trimester, April 2017*

**EVENT LOCATION:** Melbourne, Australia

**DATE OF EVENT:** 29-30 April 2017

**COUNTRY TRAVEL ORIGINATES FROM:** \_\_\_\_\_

<p><b>Air fares:</b> ISUOG will reimburse between the nearest airport to your home in Tourist / Economy class for flights under 6 hours and Premium Economy for flights over 6 hours only and up to the following maximum travel budgets for the specified regions.</p>				£																						
<table border="1"> <thead> <tr> <th>Attending from:</th> <th>Maximum travel budget:</th> </tr> </thead> <tbody> <tr> <td>Main Europe</td> <td>£150</td> </tr> <tr> <td>Scandinavia</td> <td>£250</td> </tr> <tr> <td>Israel</td> <td>£400</td> </tr> <tr> <td>E Coast N America</td> <td>\$1,700 (USD)</td> </tr> <tr> <td>W Coast N America</td> <td>\$2,000 (CAD)</td> </tr> </tbody> </table>	Attending from:	Maximum travel budget:	Main Europe	£150	Scandinavia	£250	Israel	£400	E Coast N America	\$1,700 (USD)	W Coast N America	\$2,000 (CAD)		<table border="1"> <thead> <tr> <th>Attending from:</th> <th>Maximum travel budget:</th> </tr> </thead> <tbody> <tr> <td>Singapore</td> <td>£1,900</td> </tr> <tr> <td>Australia</td> <td>\$4,000 (AUD)</td> </tr> <tr> <td>South America</td> <td>\$2,250 (USD)</td> </tr> <tr> <td>India</td> <td>£1,200</td> </tr> </tbody> </table>	Attending from:	Maximum travel budget:	Singapore	£1,900	Australia	\$4,000 (AUD)	South America	\$2,250 (USD)	India	£1,200		
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<p><b>Airport parking:</b> <i>Please attach receipts</i></p>				£																						
<p><b>Mileage expenses:</b> .....miles @ 45p per mile</p>				£																						
<p><b>Incidental expenses:</b> A maximum of £50.00 may be claimed for each segment of the return journey. This is intended to cover airport transfers, station car parking and other miscellaneous expenses. Airport transfers by taxi should be booked through the ISUOG Office. <b><i>Please attach receipts</i></b></p>				£																						
<p><b>Subsistence expenses:</b> A maximum of £25.00 may be claimed for each single journey of over 100 miles to cover expenses incurred such as meals on trains. <b><i>Please attach receipts &amp; see note 5 overleaf</i></b></p>				£																						
<p><b>Overnight expenses:</b> A maximum of £150 may be claimed to cover the cost of accommodation and meals when you have to stay overnight in transit and where this has been pre agreed. <b><i>Please attach receipts &amp; see note 6 overleaf</i></b></p>				£																						
<p><b>TOTAL CLAIMED</b></p>				£																						

NB: your honorarium will be forwarded at the same time as expenses as per the approx. rate outlined overleaf and at the discretion of the chairs.

<b>BANK NAME:</b>	
<b>BANK ADDRESS:</b>	
<b>IBAN or ACCOUNT NUMBER:</b>	
<b>SWIFT BIC or SORT CODE:</b>	

I certify that the above expenses were incurred by me and will not be claimed from another body.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

**AUTHORISED FOR PAYMENT (office use only):**

### Appendix 3: Timelines, roles and responsibilities

Timeline description	Timeline	ISUOG	Course Director	Speaker
<b>Date selection:</b> ISUOG Secretariat (in consultation with Course Directors) to review key external events and select appropriate dates accordingly	No later than 6 months prior to the course dates	✓	✓	
<b>Program:</b> (with Course Director(s) and speakers) Draft programs required and Course Directors must be confirmed. Learning objectives must be outlined.	24 weeks prior		✓	
<b>Venue:</b> ISUOG to select and negotiate price of venue, catering and AV, with input from the course director and Education Committee as required.	20-18 weeks prior	✓		
<b>Budget:</b> ISUOG to set budget in line with pre-agreed considerations outlined above. The Course Director(s) to agree budget, break even numbers, and any potential monetary/fiscal limitations.	20 weeks	✓	✓	
<b>CME application:</b> EACCME's <u>completed applications</u> to be sent at least 14 weeks prior to the event (Appendix 3). If the EACCME strict timeline for submission of the program and relevant forms is not met CME may not be possible for the Course.	18-14 weeks prior	✓	✓	
<b>Invitations:</b> ISUOG to invite speakers and confirm their attendance and their talk title as outlined by Course Director. Speaker terms must be clarified in their letters and on confirmation the Secretariat will send the ISUOG expenses policy.	20-10 weeks prior	✓		✓
<b>Course promotion (ISUOG):</b> ISUOG to undertake the active promotion of the course including: advertisement and online registration through ISUOG's website; creation of promotional flyers (e-flyers or printed as appropriate); social media, newsletters, email campaigns; promotional YouTube video if required and content has been received from Course Director(s) or speakers as appropriate.	16- 12 weeks prior and ongoing	✓		
<b>Course promotion (Course Director(s) and speakers):</b> Course Director(s) and speakers will be asked to facilitate course promotion by forwarding e-flyers and notices to any e-lists they deem appropriate including colleagues; distributing printed flyers at other events they are attending; distributing printed flyers at any clinics or institutions with which they have an affiliation; notify ISUOG to any relevant courses where further promotion could be made.	16- 12 weeks prior and ongoing		✓	✓
<b>Course materials:</b> ISUOG will provide CDs or USBs as appropriate if speakers provide their presentations and/or any other relevant materials in advance. ISUOG reserves the right to make these available for download from the ISUOG website.	6- 7 weeks prior	✓	✓	✓
<b>Delegates:</b> ISUOG to provide badges, delegate bags and other printed items for delegates along with printed certificates and evaluation forms as appropriate. A drinks reception, subject to registration numbers and budget, may be offered during the course.	During the course	✓		
<b>Post course:</b> Responses to evaluation forms will be processed and made available to Course Directors and speakers. Selected recorded lectures may be uploaded to the website plus a course review. Speakers will be reminded to claim their expenses within 6 weeks, which will be processed by the office.	1-3 weeks after the course	✓		

## **Appendix 4: CME requirements**

Submission is required at least 14 weeks prior to the event. If the program and relevant forms are not submitted CME application may not be possible and CME not applicable for the course.

1. Conflict of Interest form (COI) signed by the head of the Organising/ Scientific Committee and its members. The Chair of the Education Committee should serve as head of the Organising committee and the course director(s) as members.
2. Director's declaration
3. Signatures and bios of the members of the Scientific/Organising Committee
4. Learning Outcomes/ Objectives (497 characters / 3-4 lines)
5. Description of the nature of the event (497 characters / 3-4 lines)
6. Learning techniques/ methods used at the event (Q&A, live scanning, etc)
7. Program (with speakers and exact number of hours), venue and fees