



SASA
SOUTH AFRICAN SOCIETY OF ANAESTHESIOLOGISTS

Event Guideline

2025

Version 3.0

EVENT GUIDELINE

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1. POLICIES, GUIDELINES & SUPPORTING DOCUMENTS

- 1.1 TRANSFORMATION INCLUSIVITY DIVERSITY & EQUITY POLICY ([Find Here](#))
- 1.2 TIDE CHECKLIST ([Find Here](#))
- 1.3 PROMOTIONAL FRAMEWORK FOR EDUCATIONAL EVENTS ([Find Here](#))
- 1.4 CONSIDERATIONS FOR CHOOSING EVENT DATES ([Find Here](#))
- 1.5 NAVIGATING CLASHES ([Find Here](#))
- 1.6 MEETING ENVIRONMENTAL SUSTAINABILITY GUIDELINE ([Find Here](#))
- 1.7 PCO BLUEPRINT AGREEMENT ([Find Here](#))
- 1.8 PCO ROLES AND RESPONSIBILITIES – Events and NOT National Congress ([Find Here](#))
- 1.9 FINANCIAL PROCEDURE & GUIDELINES
- Annexure A: PCO Finance Guideline ([Find Here](#))
- Annexure B: Tax Invoice Checklist ([Find Here](#))
- Annexure C: SASA Unitary Structure Infographic Poster 1B ([Find Here](#))
- Annexure D: Seed Funding Agreement ([Find Here](#))
- 1.10 EVENT PLANNING CHECKLIST ([Find Here](#))

2. PREAMBLE

The EVENT GUIDELINE aims to support SASA SIGs, Business Units (BUs) and Branches by providing guidance when an event must be organised. This is applicable to all events except the National Congress, which is governed by the Bylaws in each instance. The EVENT GUIDELINE should be read and interpreted in conjunction with the Transformation, Inclusivity, Diversity and Equity (TIDE) Policy (Document 1.1), as well as the Promotional Framework for Educational Events (Document 1.3).

Note that this document follows a chronological approach. The first step to organising an event is to convene a pre-meeting (Section 3). Thereafter a kick-off meeting should follow with the SASA National Office also present (Section 4). Setting the date is an important step in the process and two supporting documents, Considerations for Choosing Event Dates (Document 1.4) and Navigating Clashes (Document 1.5), should be consulted. Many considerations regarding the venue are listed. When putting the programme and speakers together, please reference the TIDE Policy (Document 1.1) and use the TIDE Checklist (Document 1.2) provided. The steps and regulations regarding the advertising of the event are also explained and again, refer to the Promotional Framework for Education Events provided (Document 1.3).

Registration and invoicing, CPD applications and submissions, and financial matters are described. Preparations before, on the day of, and post the event are given. Furthermore, environmental sustainability guidelines are provided for meetings and events. Lastly, GlueUp Events Module training materials are provided through links.

3. PRE-MEETING

- 3.1 Preferably 6 – 9 months before event.
- 3.2 Determine the mission statement for the event, as well as the:
 - a. Target audience – trainees / specialists / GPs / nurses
 - b. In person / hybrid / virtual
- 3.3 Set up a committee with defined roles (one person can have multiple roles).
 - a. Overall organiser
 - b. Registration
 - c. Programme coordinator

- d. Trade Liaison – also a representative from trade
 - e. Advertising
 - f. Finance
 - g. Venue liaison
- 3.4 These need to be dedicated and committed members – attending regular meetings with deadlines on tasks.
 - 3.5 Try to be as diverse as possible in the creation of the committee, in terms of age, sector of work, race, gender and geography, as this will strengthen possible speaker and other networks.
 - 3.6 Request a list of members of the SIG/Branch from SASA National Office– for recruitment of delegates. Please note for potential sponsorship from Trade Partners a request to confirm Alliance member status should be directed to SASA National Office upon securing sponsorship.
 - 3.7 Get a bank account (SASA or PCO).
 - 3.8 Have some start-up capital in account – proportional to the size of the meeting (at least R500 per likely delegate for starters).
 - 3.9 Decide if using an events company / Professional Conference Organiser (PCO) or do it yourself. Remember that the Events Module on GlueUp can be utilised if deciding to do it yourself.
 - Events < 100 delegates will not generate enough revenue to pay a PCO
 - Events > 250 delegates usually require a PCO because of large amounts of admin involved
 - It is recommended that unless it is a very small meeting and without a virtual component, that a PCO is used
 - If you are going to use a PCO, determine a fair and transparent process for making the appointment
 - When using a PCO, avail yourself of the relevant PCO Blueprint Agreement which should be signed by the PCO and SIG/Branch representative. A copy of the signed agreement should be submitted to the SASA Financial Manager. This agreement should only be signed with the PCO on approval by the CEO or National Treasurer. Please also note the PCO Guideline (Annexure A) that should be made available to the PCO.

4. KICK-OFF MEETING

- 4.1 Once the organising team and/or PCO have been finalised, set up a “kick-off” meeting with the SASA National Office. This meeting will clarify roles, responsibilities and expectations of all parties before planning is embarked upon.
- 4.2 Confirming who will be responsible for CPD applications process, i.e., National Office or PCO.
- 4.3 Place on record with the organising team and the PCO the financial requirements as supported by documents included (Document 1.9).

5. SET A DATE

- 5.1 Liaise with SASA National Office to ensure no clashes of date – particularly if same audience being targeted.
- 5.2 Identify at least two possible dates for the event.
- 5.3 Ensure the finally agreed date is recorded on the SASA Events Calendar with the SASA National Office.
- 5.4 Ideally settled 6 months before event.

5.5 Refer to the following two documents before setting a date: Considerations for Choosing Event Dates (Document 1.4) and Navigating Clashes (Document 1.5).

6. SUSTAINABILITY

6.1 Refer to the Meeting Environmental Sustainability Guideline (Document 1.6).

6.2 All meetings and events should be planned to keep the sustainability guidelines in mind.

7. VENUE

7.1 Find a venue of appropriate price and size to accommodate delegates, refreshments, trade, lectures (this could be the virtual “venue” if exclusively a virtual event).

7.2 Estimate delegate numbers to determine the venue size required. To assess affordability, estimate potential income as follows:

- R1 000 per paying delegate per day (same rate applies for both in-person and virtual attendees), and
- R15 000 per stand per company.

Allocate approximately 60% of the projected income to venue and catering costs. (If you're working with a PCO, they can assist with this calculation.) Note: University or hospital venues are often cheaper or even free, but they require much more detailed organisation, as they usually lack dedicated congress infrastructure.

7.3 Pharmaceutical companies can often provide complimentary facilities for meetings of up to 100 delegates (but remember direct competitor companies will not be able to participate. Many pharmaceutical companies will not attend meetings at casinos / resorts).

7.4 Visit the venue before booking to ensure suitability and find out the rules re available space / catering (in house or your own) / security / parking / AV equipment and personnel etc. Will need 2 or 3 site visits during meeting preparation to iron out logistics.

7.5 Book venue (and put down deposit).

7.6 Sort out logistics with venue. Refer to PCO Roles and Responsibilities document. (Document 1.8).

7.7 Remember that many venues will have different rates for full and half days so be precise.

8. PROGRAMME & SPEAKERS

8.1 Create a draft programme early in the planning process.

8.2 Include a variety of ideas - the more options, the better.

8.3 Determine duration of talks, each session / day's programme, meeting duration

8.4 Decide where to place Q&A sessions.

8.5 Plan for tea, lunch, and trade breaks. Stagger breaks for nurses and doctors to prevent congestion at food stations and trade exhibition areas.

8.6 Chairs for sessions and overall chairperson.

8.7 Include social programme.

8.8 Obtain a Zoom / other virtual platform account and license appropriate to the size of meeting.

8.9 If the GlueUp Events Module is being used for the event, the Zoom functionality is included.

9. TIDE APPLICATION

9.1 Refer to the TIDE Policy (Document 1.1) and TIDE Checklist (Document 1.2).

9.2 Submit the programme, together with the completed Checklist, to the National Office who will

pass it on to the TIDE Events Sub-committee for consideration.

9.3 The Committee should be given at least 10 working days to respond and may request changes to your programme.

9.4 The event (beyond a save the date) cannot be advertised until the TIDE Committee has approved the programme.

9.5 This means that you need to have a draft list of speakers (who have agreed to speak) and topics at least a month, and preferably two months, before you would like to advertise the event and open registrations.

9.6 Approach speakers at least 5 - 6 months before meeting.

9.7 Focus on up-and-coming speakers / develop capacity.

10. CONFIRM SPEAKERS

10.1 May require regular communications.

10.2 Register the speakers.

10.3 For larger events, it is recommended that a single person, and usually the PCO make the formal arrangements with the speakers. This is to ensure that the terms and conditions for the speakers (honoraria, if applicable, free registration, travel, etc.) are consistent and, if applicable, in-line with the SASA Bylaws.

11. SPEAKER BRIEFS

Provide each speaker with a detailed brief well in advance. The brief should include:

- Time date and location of talk
- Duration of talk
- Number of slides for that duration (I have found 1 slide per 90 seconds is the ideal)
- How question and answer will work
- Who else is in that session
- Chair
- Requirements regarding notes or handouts
- Contact details of speaker (all telephone numbers, email and alternative contact if possible)
- Biography of speaker
- Special requirements of speaker:
 - Limited mobility
 - Transport
 - White board
 - Trade demonstration needed
 - Special equipment

12. VENUE LOGISTICS

Refer to PCO Roles and Responsibilities document (Document 1.8).

13. OTHER CONSIDERATIONS

13.1 Liaise with trade re stand prices, sponsorship and their logistical requirements. Please refer to Registration and Booking (Section 15) and Financial Matters (Section 21).

- 13.2 For fully virtual meetings / hybrids where the trade is not attending, time replaces stands and companies must be given 10 – 15 minutes after breaks to advertise products during non-academic time.
- 13.3 Notify trade of meeting dates at the earliest possible opportunity (ideally before the end of the preceding trade financial year).

14. EVENT ADVERTISING

- 14.1 Refer to the Promotional Framework for Educational Events (Document 1.3).
- 14.2 The organising committee (usually with the assistance of the PCO) must create the event marketing material (this could include the event logo, flyers, posters, social media formats, etc.). This may be hard or electronic formats.
- 14.3 The marketing material must be sent to the SASA Brand and Communication Liaison for assistance with formatting and to ensure alignment with the SASA brand guidelines.
- 14.4 Electronic posters / advertisements can be distributed using the SASA Newsletter and Email Campaigns on GlueUp to potential delegates.
- 14.5 Provide regular updates on meeting highlights
- 14.6 Consider financial incentives for early registration.
- 14.7 Distribute physical posters to local hospitals and clinics in the event area.
- 14.8 Utilise the SASA Website (www.sasaweb.com) for advertising and registration.
- 14.9 If the Event is created using GlueUp Events Module it will be automatically linked to the SASA website.

15. REGISTRATION AND BOOKING

- 15.1 Have a registration system to invoice, reconcile and confirm payments from trade and delegates.
- 15.2 The GlueUp Events Module (Section 22) provides these functionalities. Please refer to the GlueUp Training Links.
- 15.3 Alternatively, the PCO will have a similar program to run registrations, invoicing and recons.
- 15.4 Confirmation of SASA membership:
 - SASA member status should be recorded to accurately report on member vs non-member derived income. This is done automatically in the GlueUp Events module. For events not managed on Glue Up, membership status should be confirmed with SASA National Office.
 - For delegates attending a SIG/Branch event, SASA membership status should be confirmed directly with the SASA National Office, as bespoke membership lists are not provided to event organisers or PCOs. It is the responsibility of the SIG/Branch event organiser to ensure membership verification in co-ordination with the SASA National Office.
 - Billing should reflect verified membership status and category. Delegates who were initially billed as members but were confirmed by the SASA National Office to not be members in good standing should receive an updated invoice (and a credit note for the original invoice) and should be requested to pay the amount due. This process should be administered by the event organiser/PCO.
 - This process ensures member benefits and pricing are applied fairly.
 - For Trade – SASA Alliance member status should be checked with SASA National Office before invoicing. If Trade is not an Alliance member, SASA National Office will send a link to Trade to apply for membership on Glue Up. Alternatively, SASA National Office will issue an Alliance member letter conferring Alliance member status. Alliance

membership is renewed annually on anniversary in line with all other membership types.

15.5 No invoice should be issued to Trade until SASA National Office has confirmed their Alliance

membership status.

15.6 Onsite registration and post-event membership verification

- Delegates should indicate their SASA membership status during onsite registration. As soon as possible post-event, the event organiser/PCO should send onsite registration information to the SASA National Office for verification of membership.
- Billing should reflect verified membership status and category. Delegates who were initially billed as members but were confirmed by the SASA National Office to not be members in good standing should receive an updated invoice (and a credit note for the original invoice) and should be requested to pay the amount due. This process should be administered by the event organiser/PCO.
- This process ensures member benefits and pricing are applied fairly.

16. CPD: APPLICATIONS AND SUBMISSIONS

16.1 If the PCO is handling CPD, get confirmation in writing.

16.2 Alternatively, arrange with the SASA National Office to assist with the CPD application and

submission process.

16.3 Ethics points will require special motivation.

16.3 Refer to PCO Roles and Responsibilities document (Document 1.8).

17. BOOK AND PAY SERVICE PROVIDERS

Refer to PCO Roles and Responsibilities document (Document 1.8).

18. PREPARATIONS BEFORE THE EVENT

18.1 Prepare all things to be given to delegates at registration and during the day:

- Name tags
- Lanyards
- Programme
- Handouts

18.2 CPD requirements.

18.3 Organise trade setup on the day or before the day / sites / access / labour / equipment.

18.4 Do you need JOC (Joint operations commission) permission to hold the event.

18.5 Security

18.6 First aid required.

18.7 Speaker confirmation and reminder in days before meeting.

18.8 Refer to PCO Roles and Responsibilities document (Document 1.8).

19. ON THE DAY

19.1 Registration needs to be well manned, slick, fast and organised and is busiest just before the meeting starts.

19.2 CPD logging and management system (Discovery will often do this for larger events)

19.3 Lots of checking and little working is the goal - need to oversee:

- Is the setup as pre-planned?
- AV working and talks loaded (best is submission of presentations at least 24

- hours before lecture)
- Registration smooth
- Timekeeper with method of notifying next session is starting
- Catering and meals
- Venue logistics and issues
- Trade logistics and issues
- Confirmation that speakers and chairmen have arrived and are in the correct venue when they need to talk
- Spare talks available if speaker is delayed or does not turn up

19.4 Refer to PCO Roles and Responsibilities document (Document 1.8).

20. POST EVENT

20.1 Debrief as soon as possible making written notes for future meetings on what works, what didn't, issues that need to be addressed (ideally before leaving at the end of the meeting).

20.2 Process CPD spreadsheet certificates and send to HPCSA – SASA National Office will do

this, or alternatively, the PCO.

20.3 Create and send thank you letters to speakers, delegates and trade.

20.4 Pay accounts remaining for service providers.

20.5 Reconcile expenses and income, refer Financial Matters.

20.6 Book your venue for next year if it has worked well.

21. FINANCIAL MATTERS

21.1 WHEN MAKING USE OF A PROFESSIONAL CONGRESS ORGANISER (PCO)

See Annexure A – PCO Finance Guideline

See Annexure C - SASA Unitary Structure Infographic Poster 1B

21.2 GENERAL

- A business relationship is implemented between the SIG/Branch (as part of SASA unitary) and the PCO, facilitated through an **agency agreement**, the PCO Blueprint Agreement (Document 1.7).
- The PCO functions as if they are a unit of SASA for the specific event that they are contracted for
- The PCO Blueprint Agreement must be signed by SIG/Branch representative and the PCO.

21.3 85:15 RULE (MEMBER VS NON-MEMBER DERIVED INCOME)

- As events generate income the 85:15 rule should be taken into account.
- Accurate records should be kept for delegates indicating their SASA member status. Refer Registration and Booking (Section 15).

21.4 SEED FUNDING

- If Seed Funding is required for an event, a standard Seed Funding Agreement (Annexure D) should be used and signed by the Branch/SIG representative and the PCO.
- A copy of the signed agreement should be provided to the SASA Financial Manager.

21.5 VAT REQUIREMENTS

- VAT agency rules apply.
- Refer Annexure A – PCO Guideline & Annexure B – Tax Invoice Checklist for more detailed information regarding invoicing, expenditure and the treatment of VAT.

21.6 POST EVENT REPORTS

- Financial reports should be submitted to SASA's Financial Manager no later than 3 months after the event.
- Refer Annexure A – PCO Guideline for a list of reports required.

21.7 EVENTS NOT MANAGED BY PCO

SASA National Office will provide the standard financial support, which includes:

- Full accounting for all event income and expenditure.
- Calculation of income split based on source – member vs non-member derived in keeping with 85:15 rule.
- Issuing of Alliance Membership invoices as well as invoicing of delegates (via GlueUp).
- VAT compliance, reconciliation, declaration and payment to SARS.
- Calculation of event surplus post event.

22. GLUE UP EVENTS MODULE TRAINING LINKS:

22.1 When using the Webinar function on Glue Up for virtual events, remember to contact Zoom to activate this Webinar function on Zoom.

22.2 Use the below links to access the GlueUp training manuals for:

Event set-up:

<https://help.glueup.com/designing-publish-events/creating-a-new-event/>

Publishing online events:

<https://help.glueup.com/designing-publish-events/manage-online-events/>

Onsite events:

<https://help.glueup.com/events/onsite-events/>

23. CONTACTS FOR EVENT SUPPORT (NATIONAL OFFICE)

Role	Email	Point of Contact For
Operations Manager	ops@sasaweb.com	GlueUp Events support, Kick-off meeting contact.
Finance Manager	finance@sasaweb.com	Event budgets, seed funding agreements, VAT compliance, invoicing, reconciliation, post-event financial reporting. Alliance membership for trade.
Brand and Communications Liaison	comms@sasaweb.com	Event advertising and marketing materials, ensuring SASA brand compliance, social media and newsletter support. Events Calendar.
Academic Liaison	academic@sasaweb.com	CPD applications and submissions.
Member Liaison	sasa@sasaweb.com	Membership verification, member queries, email

		campaigns, Zoom account.
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