### I. Request for Proposal Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Medical Education/Communications Company (MEC) Application Deadline:</th>
</tr>
</thead>
</table>
| September 6, 2017     | Bone, Lipids/Cardiovascular, Thyroid, Reproductive Endocrinology     | • Completed and Signed CMES Application Form  
• Full Proposal  
• Proposed Budget (in Endocrine Society format)  
• Educational Partner Attestation Form |
| September 27, 2017    | Obesity, Diabetes, Pituitary                                          | • Completed and Signed CMES Application Form  
• Full Proposal  
• Proposed Budget (in Endocrine Society format)  
• Educational Partner Attestation Form |
| September 14, 2017    | Special Programs Committee Application Review (Bone, Lipids/Cardiovascular Endocrinology, Reproductive Endocrinology, and Thyroid) | Endocrine Society Provides:  
• Comments from review by Special Programs Committee  
• Comments on submitted budget |
| October 6, 2017       | Special Programs Committee Application Review (Adrenal, Diabetes, Obesity, Pituitary) | Endocrine Society Provides:  
• Comments from review by Special Programs Committee  
• Comments on submitted budget |

- MEC may formally submit the proposal to the Commercial Supporter after review and Society comments/concerns are addressed. See section titled “Proposal Submission” if the Commercial Supporter requires the Accredited Body to submit the proposal.

**Upon Official Approval by the Commercial Supporter:**

<table>
<thead>
<tr>
<th>Fall 2017 – December 2017</th>
<th>MEC submits the following to the Society:</th>
<th>Endocrine Society provides MEC with or completes the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Official Approval (in writing) from the Commercial Supporter</td>
<td>• Ancillary Symposia Information Packet</td>
</tr>
<tr>
<td></td>
<td>• Final proposal and budget as submitted</td>
<td>• Date and Time Options for Program</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Invites the Program Director</td>
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<td></td>
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<td>• Invites the faculty, determined by the Program Director</td>
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</tbody>
</table>
- Sends confirmations to Program Director and faculty through the speaker management system, cOASIS
- Once invitations are complete, Society staff will turn the program over to the MEC for continued development

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 22, 2017</td>
<td>At least 50% of preliminary budget is due from Supporter</td>
</tr>
<tr>
<td>December 15, 2017</td>
<td>MEC submits Doctor’s Bag insert for review/approval</td>
</tr>
<tr>
<td>January 26, 2018</td>
<td>MEC submission of program materials:</td>
</tr>
<tr>
<td></td>
<td>• MEC submits educational content (e.g., Program Book/Slides) for review/approval</td>
</tr>
<tr>
<td>February 2, 2018</td>
<td>MEC submits Meeting and Expo Planner ad for review/approval</td>
</tr>
<tr>
<td>February 9, 2018</td>
<td>MEC ships two (2) signs to the Endocrine Society</td>
</tr>
<tr>
<td>April 17, 2018</td>
<td>MEC final invoice, costs, and reconciliation in Society format due to the Society</td>
</tr>
<tr>
<td>May 4, 2018</td>
<td>Evaluation data of program and attendee demographics of the symposium is provided by the Society to the MEC</td>
</tr>
</tbody>
</table>
II. Proposal Submission
- The Endocrine Society requires MECs to submit all proposals. The Society must be listed as the payee in the grant submission.
- If the Commercial Supporter requires the accredited provider to submit the proposal on the MEC's behalf, the MEC must provide the Society with the following:
  - A Word document that answers every question compatible with the potential supporter’s online grant system
  - A copy of the program budget in the exact format needed to submit to the potential supporter
  - Note: The Society does not provide access to online grant systems
- To the best of its ability, the Society will submit all MEC applications within two weeks of initial receipt. The Society will provide the MEC with email confirmation of submission and funding.

III. Grant Application Information
Appendix A (page 7) includes information that your company may use when submitting a grant application to the commercial supporter, including information on ENDO attendance, the Society, our CME Mission Statement, enduring materials information, marketing information, tax ID number, etc.

IV. ENDO 2018 Space Availability

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>CME Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saturday, March 17</td>
<td>6:00-9:00 pm</td>
<td>2 time slots, 2.5 CME Credits</td>
</tr>
<tr>
<td>Sunday, March 18</td>
<td>5:15-7:45 am</td>
<td>2 time slots, 2 CME Credits</td>
</tr>
<tr>
<td></td>
<td>6:00-9:00 pm</td>
<td>2 time slots, 2.5 CME Credits</td>
</tr>
<tr>
<td>Monday, March 19</td>
<td>5:15–7:45 am</td>
<td>2 time slots, 2 CME Credits</td>
</tr>
<tr>
<td></td>
<td>6:00-9:00 pm</td>
<td>2 time slots, 2.5 CME Credits</td>
</tr>
<tr>
<td>Tuesday, March 20</td>
<td>5:15-7:45 am</td>
<td>2 time slots, 2 CME Credits</td>
</tr>
</tbody>
</table>

- Registration for morning symposia begins at 5:15 am. The activity must conclude by 7:45 am.
- Registration for evening symposia begins at 6:00 pm. The activity must conclude by 9:00 pm.
- The Endocrine Society will not schedule multiple symposia of the same therapeutic area concurrently. Therefore, space reservations are made on a first-come, first-served basis. Priority date/time assignments will be given to companies in the order that funding is received.

Total Anticipated ENDO 2018 Attendance
7,500+ Scientific Attendees
9,000+ Total Attendees

Anticipated Symposium Attendance
300
Symposium Locations:
McCormick Place South, Grand Ballroom
2301 South King Drive
Chicago, IL 60616

V. Responsibilities
Following are the standard roles and responsibilities of the Endocrine Society and the MEC, unless other agreements have been made.

A. Medical Education/Communication Company (MEC)

- Prior to submission to commercial supporter provide the Society with:
  - Completed and signed Application form
  - Full proposal
  - Proposed budget in Endocrine Society format
  - Completed Educational Partner Attestation form
- Submit the educational activity application and budget to the commercial supporter upon approval by the Society
- Upon approval by the commercial supporter submit to the Society:
  - Official approval (in writing) or letter of agreement from the Commercial Supporter
  - Final proposal and budget as approved by commercial supporter
  - Staff Disclosure of Financial Relationships & Resolution of Conflicts of Interest
- Upon confirmation of all faculty by the Endocrine Society, schedule a conference call with the complete faculty and Society staff to discuss activity agenda, content, learning objectives, and logistics
- Work with speakers to facilitate development of symposium materials; the MEC must copy Society staff mklinke@endocrine.org on ALL email correspondence with speakers
- Develop marketing for the activity
- Submit presentation slides and all other activity-related materials (handouts, signage, ads, etc.) to the Society for review and approval prior to production
- Schedule an onsite slide review session with faculty and invite society representatives to participate
- Coordinate, print, and ship program materials (e.g., handouts, flash drives, etc.) to the meeting site
- Manage meeting logistics, which include:
  - Food and beverage
  - Additional A/V other than standard setting
  - Inbound and outbound packages
- Submit financial reconciliation in Society budget format and final invoice and backup within 6 weeks following the event
- Develop a final outcomes report for the commercial supporter. The Society will provide attendance and evaluation data for inclusion in the report. All reports must be reviewed and approved by the Society prior to submission in accordance with the commercial supporter timeframe.
- Submit final invoice to supporter after Society review
- Complying with all supporter required Physician Payments Sunshine Act requests
B. Endocrine Society (the Society)
- Review and approve the activity application and proposed budget
- Serve as the sole ACCME-accredited provider
- Manage the invitation and confirmation process for Program Director and faculty
- Collect faculty and MEC staff disclosure information
- Resolve/manage all conflicts of interest
- Participate in all communication between faculty and MEC including conference calls, emails, and slide review sessions
- Facilitate speaker travel and housing (upon confirmation of participation, the Society will provide faculty with instructions for booking their travel and housing, but will not make these arrangements on their behalf)
- Work with speakers to facilitate development of activity-related materials
- Assign the meeting space for the symposium room and slide review session room
- Review and approve all activity-related materials, including signage, marketing materials, meeting handouts, and slides for handout production and presentation
- Provide directional signage for all ancillary symposia
- Manage advance and onsite registration
- Provide activity evaluation and CME certificates
- Provide the MEC and the supporter a summary of the evaluation results
- Pay speaker honoraria and reimburse travel expenses (the Society will contact faculty directly and provide them with instructions on how to submit travel expenses for reimbursement).
- Pay MEC after financial reconciliation completed and final payment received from commercial supporter

VI. Financial Process
- As required for ACCME compliance, funding for the symposium must be sent directly to the Endocrine Society in the form of an educational grant from the supporter. The Endocrine Society will pay the MEC directly once the funds are received from the commercial supporter. The Society will serve as sole payer of speaker honoraria and travel reimbursements.
- Upon approval, the commercial supporter will make initial payment for the educational grant according to grant office standard operating procedures. Or, the Society will request 50% of the estimated budget from the supporter in advance of the symposium and the remaining costs after the symposium.
- Once the Society receives payment from the commercial supporter, the MEC may request 50% of its estimated budget.
- Following the meeting the MEC must submit an invoice and final reconciliation in the budget format provided by the Society and backup within 30 days. Once the MEC submits these documents, the Society will provide final payment. The MEC must complete the financial and outcomes reconciliation through the Commercial Supporter’s online form unless the accredited provider was required to submit the grant. If the Society completed the submission, the MEC must provide all appropriate budget reconciliation information and outcomes reports in the format required by the funder’s online grant system.
- If the final reconciliation and backup is not received by the supporter deadline, the Society will submit the MEC budgeted amount to the supporter and will notify the supporter of the non-compliance with these requirements. The Society will hold final payment to the MEC
until final reconciliation and backup is received. In this event, the MEC will not be reimbursed for more than the budgeted amount.

VII. Cancellation Policy
- In the event that the MEC submits a Space Reservation form without written confirmation from the commercial supporter, and the commercial supporter chooses not to provide funding for the program at any time, the Society will impose a cancellation fee of $8,500 and any out-of-pocket expenses incurred to the MEC.
- In the event that the supporter withdraws its support of the planned program, the Society will impose a cancellation fee of $8,500 and out-of-pocket expenses incurred to the commercial supporter.

VIII. Promotional Material
A. Descriptions of Promotional Material
   - Doctor’s Bag Postcard: The MEC should develop and print 4,000 postcards and provide to TriStar to be distributed in the Doctor’s Bag before the program. The insert must be provided to the Endocrine Society for approval by December 15, 2017. Costs for this item are included in the Society’s budget format; the MEC must provide estimated costs for printing and shipping the insert.
   - ENDO 2018 Meeting and Expo Planner: The MEC should provide a one-page advertisement to the Endocrine Society for approval by February 2, 2018. The Endocrine Society will compile all ads into the Meeting and Expo Planner, which will be distributed to attendees at registration. Costs for this item are included in the Society’s budget format.
B. Guidelines for Promotional Pieces
   - The Endocrine Society must approve all promotional material in advance of printing. The Society reserves the right to deny any request and to edit promotional copy for consistency and accuracy. Material will require at least 5 business days for review.
   - No additional product or promotional information may be distributed.
C. Logo Requirements
   - The Endocrine Society’s logo must be present on all promotional material (e.g., flyers, posters, syllabus, etc.).
   - Endocrine Society staff will provide digital formats of the Society’s logo for use.

IX. Speaker Correspondence
- MECs may not contact any faculty until given permission to do so by the Endocrine Society (failure to abide by this requirement may result in withdrawal of the CME accreditation and will jeopardize eligibility for involvement with future programs).
- Endocrine Society staff must be copied on all communications, including conference calls, between the MEC and faculty.
- The Endocrine Society will appoint a Special Programs Committee liaison to oversee the program. The committee liaison will select the Program Director. The Endocrine Society will invite the Program Director and all faculty. Once the Program Director and the faculty are approved, the Endocrine Society will send out the speaker confirmation letters. A copy of the letters will be forwarded to the MEC’s logistics contact.
- Upon confirmation of the complete faculty, the Society will invite the MEC to schedule a conference call with the Program Director, speakers and Society representatives. After this
milestone has been met, MECs are permitted to contact the faculty, but must copy the Society on all email correspondence. Likewise, Society staff must participate in all conference calls with faculty.

- The MEC and/or commercial supporter may not influence the speakers in any way in the development of their presentations for the symposium. If the Society discovers the party(s) has attempted to influence the content of the activity, the event may be canceled and the commercial supporter will not be permitted to support an activity the following year. The Society must be included in all correspondence to faculty related to content development.

X. Disclosure Form and Conflicts of Interest

- It is the responsibility of the Society to collect and review all faculty disclosure information prior to confirming participation in the CME activity. Complete disclosure information will be provided to the MEC by the Society for inclusion in the handout.
- All persons in a position to control content at the MEC must submit a staff disclosure form to the Endocrine Society. The form can be found in the Ancillary Symposia Information Packet.
- The Endocrine Society requires that all individuals in a position to control content of a CME-certified activity complete and return a Financial Disclosure form prior to contributing to that activity. This form is used to report any financial relationships content contributors have with relevant commercial interest(s). The form can be found in the Ancillary Symposia Information Packet.
- The Endocrine Society has a process to identify, assess, and resolve potential conflicts to ensure that educational content presented is free of commercial bias. Content is vetted and modified using a process that includes disclosures of personal financial relationships; internal and external expert peer reviews of content to ensure balance and objectivity; modifications to content as appropriate; and referencing peer-reviewed sources.

Financial relationships with relevant commercial interests are included in the disclosure-to-participant information for each CME-certified activity prior to the start of the activity.

XI. Recording

- If funded, sessions will be digitally recorded by the Society for archival purposes. It is the responsibility of the Society to obtain permission from the faculty before recording the sessions. No other recording is permitted without prior permission.

XII. Evaluation Forms

- The Endocrine Society is responsible for development, distribution, and processing of the activity evaluation forms, unless otherwise agreed upon by the parties. Evaluation forms will not be sent prior to the meeting for inclusion in the handout. No other evaluation forms are permitted to be distributed at the meeting without prior approval by the Society.
- The standard evaluation form is included in the Ancillary Symposia Information Packet. MECs are allowed to make changes, pending approval of the Endocrine Society.
- All evaluations are hosted online. The survey link will be provided to all MECs for inclusion in the handout material. Attendees will also receive an email with the survey link following the program.
- The MEC and/or commercial supporter will receive an evaluation summary report from the activity approximately 6 weeks after the event.
XIII. Ancillary Symposia Information Packet
The Ancillary Symposia Information Packet will be provided to the MEC upon approval of grant. The reference document includes:
1. Logistic Information
2. Program Handout and Slide Requirements
3. Front Matter Template
4. Intro Slides Template
5. Evaluation Template
6. Staff Disclosure Form

XIV. Contact
All parties interested in collaborating with the Society should email, development@endocrine.org, to express interest and to receive detailed information about the Society’s protocols.
APPENDIX A: REFERENCE MATERIALS FOR PROPOSAL DEVELOPMENT

Accreditation
ACCME Provider Number: 0000208
The Endocrine Society is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians. In July of 2015, the Society was awarded a consecutive term of Accreditation with Commendation. Any CME-accredited activity developed in conjunction with the Society will meet the stringent requirements of the ACCME’s Essential Areas and Elements, including the Updated Criteria for Accreditation and Standards for Commercial Support. As the accredited provider of the activity, the Society is responsible for its development, educational content, and scientific integrity.

Endocrine Society Tax ID Number
73-0531256

About the Endocrine Society
The Endocrine Society, a professional association of over 18,000 physicians and scientists, is an experienced and recognized leader in developing educational activities designed to improve professional practice among physicians and allied health professionals involved in the treatment of endocrine and endocrine-related disorders. This educational focus is clearly defined in the Society’s mission to advance excellence in endocrinology, and we seek support for activities that respond to the educational needs of our members and the broader medical community who treat patients with endocrine disorders.

Activity Development
The symposium agenda, including identification of speakers and topics, is developed by the Program Director, who is selected by the Society’s Special Programs Committee (SPC). The Program Director oversees development of the educational activity and exerts editorial control over the symposium content. The Society will designate an SPC Liaison from the committee to review final activity content (prior to inclusion in the activity handout) and provide peer review to resolve any reported conflicts of interest as indicated by the faculty on their financial disclosure forms.

In accordance with the ACCME Standards for Commercial Support, everyone participating in the development of the educational content is required to provide disclosure information, and any conflicts of interest will be managed through the Society’s mechanism to resolve conflicts of interest.

Types of Activities
The Society’s CME program offers live activities, including symposia, conferences, workshops, and lectures. In addition, we offer manuscript review, and enduring materials and self-assessment products, both in print and online, including monographs, and audio-, video- and web-based formats designed to provide flexibility and accommodate the learning needs and preferences of our target audiences.

Content Areas
The Society’s CME program consists of, but is not limited to, endocrine-related topics based on needs assessment in clinical practice, medical research, medical technology, clinical pathways, outcomes management, quality of care, managed care, and other relevant issues and concerns of endocrinologists.
Target Audience
The Society’s CME activities are designed to meet the educational needs of the following:
- Endocrinologists (physicians and fellows)
- Pediatric Endocrinologists (physicians and fellows)
- Internists
- Primary Care Physicians
- Endocrine Nurses
- Researchers
- Other Advanced Practice Professionals

Expected Results
The primary expectation for these activities is to increase awareness among healthcare professionals and enhance patient care regarding the: a) scope and clinical implications associated with endocrine disorders; b) current screening, diagnostic, and clinical management strategies for endocrine disorders; and c) current research pertaining to endocrine and endocrine-related disorders.

OUTCOMES MEASUREMENT
All educational activities developed by the Special Programs Committee are evaluated for their effectiveness and balance using several methods, including online participant evaluation forms, CME Reviewer evaluations, and speaker/faculty post-program discussion.

1. Pre- and Post-Test Option
   Optional enhancements to the live activity evaluation process may include pre- and post-tests that use clinical case vignettes and/or medical knowledge questions specific to the symposium content to measure specific changes in participant practice behavior. Pre-registrants are tested 4-6 weeks prior to the symposium. The Endocrine Society will send all pre and post-tests. Data will be made available to the faculty and MECs to demonstrate educational impact.

2. Audience Response System Option
   Audience response polling may be used during the live presentation to assess knowledge and clinical decision making via case vignettes. Such audience response polling technology allows faculty to pose questions in the context of clinical cases to measure key clinical concepts before and after presentation of intervention content, thereby enabling measurement of changes in knowledge and competence.

3. Post-Activity Follow-Up Survey
   Attendees are invited to participate in an incentivized follow-up survey 4-6 weeks after the meeting. Follow-up surveys examine the degree to which session objectives were met, whether attendees made improvements to clinical practice, and whether patients benefited from the changes. Participants are further asked to provide examples of improvements made challenges or barriers encountered when attempting to implement change, and advice on what the Endocrine Society may be able to do to help address the challenges. Participants are once again asked to list topics where additional education is needed. The follow-up survey concludes with additional reinforcing resources for participants, including links to relevant clinical practice guidelines and patient factsheets, as well as to online enduring educational activities.
ENDURING ACTIVITY DESCRIPTIONS

- ENDO Session Recordings
  The ENDO 2018 Session Recordings include the audio and slide capture of clinical and translational highlights from the Annual Meeting program. The ancillary symposium activity may be included in the session recordings for one year after the live presentation. The ancillary symposia sessions recordings will be available free to all via the online library at sessions.endocrine.org. This CME-accredited enduring activity will be available for 12 months following activity launch.

ENDURING MATERIAL DISTRIBUTION CHANNELS
For an additional fee, internet based enduring products can be hosted and/or advertised through distribution channels including MedPage Today, Medscape, myCME and/or Reach MD to attract an even broader audience. The following summaries were provided by representatives of each company.

- MedPage Today
  MedPage Today (MPT) is the fastest growing online destination for clinicians seeking breaking medical news. Having MPT as your distribution partner means delivering your educational activity to thousands of engaged clinician learners each day. News-driven engagement means access to over 1.1 million readers on the site each month and over 840,000 registered members. Each CME Spotlight link garners an average of 400-500 clicks to the educational activity per month. Due to strategic partnerships, MPT now reaches over 75% of all U.S. PCPs and 96% of all U.S. oncologists. MPT also employs an aggressive daily email and mobile push strategy that is responsible for over 40% of all CME Spotlight clicks.

- Medscape Education
  Medscape, LLC’s mission is to provide clinicians and other healthcare professionals with timely, comprehensive, and relevant clinical information to improve patient care; to make the clinician’s task of information-gathering simpler, more fruitful, and less time-consuming; and to provide clinicians with the educational tools needed to stay current in their practice. With more than 32 specialty-focused websites offering thousands of free CME/CE courses for physicians, nurses, and other healthcare professionals, Medscape Education is the leading online destination for CME, accounting for 35% of all physician-based CME. Featuring the largest online audience of healthcare professionals, Medscape reports an active US membership of over 1.7 million – over 675,000 active physician members and more than 1 million nurses, pharmacists and NPs/PAs. Over 1.2 million members (500,000+ active US physicians and 700,000+ HCPs) access Medscape through their mobile devices. With 80% of US physicians using their mobile devices for professional purposes and medical education, enduring programs are optimized and included on the Medscape CME mobile app for increased visibility at the point of care, and access, anywhere anytime, on any device.

- myCME
  myCME is a gated website, requiring learners to complete a registration process and to log in prior to participating in any activity. myCME distributes webcast productions to an audience of >820,000 learners including endocrinologists, primary care physicians, and other healthcare professionals. The registration process asks users to provide their profession, primary and secondary specialties (if applicable), and areas of interest. With this information, myCME employs a unique proprietary algorithm to create an individualized homepage for each learner, displaying educational activities filtered by the user’s profession (physician, nurse practitioner
[NP], physician assistant [PA], etc.), then sorted by primary and secondary specialties, and topics of interest. Hosted activities on myCME guarantee 2,000 unique learners and 500 CME claims.

**Promotional Material**
The Endocrine Society will provide the following marketing opportunities for all CMES symposia at ENDO 2018, if the activity is developed following the timeline listed in prior sections of the application guidelines.

- **Print**
  - Doctor’s Bags inserts (~4,000 per day)
    - Support must be received by **December 8, 2017** to acknowledge support
  - **ENDO 2018 Meeting and Expo Planner** (7,500+)
    - Support must be received by **January 26, 2018** to acknowledge support
  - **ENDO Daily Schedule** (a supplement to the Daily Newspaper) (~4,500 daily)
  - On-site signage (8,000+)

- **Electronic**
  - Announcement in the Worldwide Endocrine Events Calendar on the Society’s website (100,000+ unique visitors monthly)
  - **ENDO 2018 scientific program website** (95,000+ unique visits)
  - Pre-Meeting Announcements (4,600+/issue)
  - Program advertisement and summary in the *Clinical Essentials* e-newsletter (12,000+ clinical members monthly)
  - Promotion in emails sent daily during ENDO 2018 (4,600+ per email)
  - **ENDO meeting application** for iPhone, Android, and Blackberry users (6,000+ users)
  - **Social Media Promotion**
    - Facebook (13,911 likes)
    - Twitter (8,607 followers)
    - LinkedIn (3,375 members)

**Patient Education Materials**
The Society’s Hormone Health Network (HHN) offers a unique opportunity for public exposure through patient education efforts, supported by the Society’s scientific integrity and extensive resources.

HHN is a digital portal ([hormone.org](http://hormone.org)) that provides patient education resource on hormones and health, disease and treatment. Its goal is to positively impact the treatment outcomes of endocrine patients by moving them from educated to engaged, from informed to active partners in their healthcare. The HHN strategy is to deliver the information and resources patients and providers need to have more collaborative, focused discussions about a condition and its treatment, conversations that research has consistently shown are fundamental to fuller patient engagement and, ultimately, better healthcare outcomes.

Together, the Endocrine Society and the HHN work to foster a greater understanding of endocrinology among patients, the general public, and practitioners of complementary medical disciplines. For more information, please contact Lisa Petrovich at [lpetrovich@endocrine.org](mailto:lpetrovich@endocrine.org).