

TIMELINES

Request for Proposal Timeline

<p>October 2 (unless responding to call for concepts or RFP – please follow supporter guidelines/process; if more time is needed for supporter review, i.e. 90 days, please reach out)</p>	<p>Medical Education/Communications Company (MEC) Application Deadline:</p> <ul style="list-style-type: none"> • Completed and Signed CMES Application Form • Concept Proposal <ul style="list-style-type: none"> ○ Letter of Request ○ Title ○ Full Needs Assessment (with references) ○ Needs Assessment Summary (1000 characters) ○ Agenda ○ Faculty ○ Education/Delivery Format ○ Target Audience/Expected Reach ○ Audience Generation ○ Outcomes Measurement (including outcomes level) • Proposed Budget (in <i>Endocrine Society format</i> only) • Educational Partner Attestation Form • Company Firewall Policy
<p>October 16</p>	<p>Endocrine Society Provides:</p> <ul style="list-style-type: none"> • Comments from review by Special Programs Committee • Comments on submitted budget • Additional required forms based on funder(s) selected
<p>October 23</p>	<p>Deadline for submission of revised/final MEC proposal and supporting documents (proposal, budget).</p>
<p>Upon Proposal Approval from Endocrine Society</p>	<p>MEC to formally submit proposal to Commercial Supporter, unless otherwise specified per funder guidelines</p>

Upon Official Approval by the Commercial Supporter:

<p>Fall 2019 – January 2020</p>	<p>Endocrine Society:</p> <ul style="list-style-type: none"> • Provides MEC with Ancillary Symposia Information Packet • Provides MEC with date and time options for program • Invites the Program Chair • Invites the faculty, determined by the Program Chair • Sends confirmations to Program Chair and faculty
<p>Once Faculty and Program Chair are Confirmed</p>	<p>MEC</p> <ul style="list-style-type: none"> • MEC will schedule a conference call with the complete faculty and Society staff to discuss activity agenda, content, learning objectives, and logistics • MEC leads continued development (with Society staff included in all correspondences) <p>Endocrine Society:</p> <ul style="list-style-type: none"> • Facilitates faculty travel arrangements

45 days before the program	MEC submits printed materials (program books/doctors bag inserts/handouts/signage) to Endocrine Society for review/approval
30 days before the program	Preliminary budget is due from MEC to Endocrine Society. *If the MEC receives payment from the supporter, Endocrine Society portion of the program budget is due to the Endocrine Society from the MEC.
2 weeks before the program	MEC submits slide deck to Endocrine Society for review/approval
2 weeks before the program	MEC ships (3) program signs to the Meeting Location(s) (one 28"x44" for outside the room and two 22"x28" for CMES Wall and foyer)
1 week and 2 weeks before the program	Symposium sign up or registration headcount is provided by the Society
2 weeks after the program	Symposium attendee demographics provided by the Society to the MEC
8 weeks after the program	MEC final invoice (if no enduring component), costs, and reconciliation in Society budget format due to the Society
60 days after the program	MEC provides outcomes report to Endocrine Society

ENDO 2020 SYMPOSIUM DETAILS

Location

- San Francisco Marriott Marquis

Session Selection

- Session time slots are provided on a first come, first served basis
- The Endocrine Society will provide the MEC with available time slots upon receiving the official approval or letter of agreement

ENDO 2020 Space Availability

Date	Time	CME Availability	Expected Audience
Saturday, March 28	Dinner TBD	2 time slots, 1.5 CME Credits	300
Sunday, March 29	6:00-7:45 am	2 time slots, 1.5 CME Credits	200
	Dinner TBD	2 time slots, 1.5 CME Credits	300
Monday, March 30	6:00-7:45 am	2 time slots, 1.5 CME Credits	200
	Dinner TBD	2 time slots, 1.5 CME Credits	300
Tuesday, March 31	6:00-7:45 am	2 time slots, 1.5 CME Credits	200

- Registration for morning symposia begins at 6:00 am. The activity must conclude by 7:45 am.
- The Endocrine Society will make all effort to 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 2020 Attendance

6,000+ Scientific Attendees

7,500+ Total Attendees

ANCILLARY SYMPOSIUM INFORMATION PACKET

- The Ancillary Symposia Information Packet will be provided to the MEC upon approval of grant. The reference document includes:
 1. Presentation Guidelines
 2. Front Matter Template
 3. Intro Slides Template
 4. Evaluation Template/Link
 5. Staff Disclosure Form (link)

GRANT APPLICATION

- Prior to submission to commercial supporter, the MEC must provide the Society with:
 - Completed and signed Application Form
 - Full proposal
 - Proposed budget in Endocrine Society format **only**
 - Completed Educational Partner Attestation Form
 - Any additional forms required to submit to the funder's grant portal
- The MEC will submit proposal to the sponsor.
 - To the best of its ability, the Society will return all MEC applications with SPC review within two weeks of receiving a final copy. The MEC will provide the Society with email confirmation of submission.
 - Final proposals and supporting documentation are expected **no later than COB October 9, 2019**. Deadline extensions are not to be expected.
- The **MEC must list the Endocrine Society as the payee**
 - If the MEC receives the payment from the sponsor, the MEC must provide the Endocrine Society with their portion of the program budget **30 days prior to the program**
- Upon approval by the commercial supporter, the Society will send the MEC a link to complete the Staff Disclosure of Financial Relationship & Resolution of Conflicts of Interest Form

LOGISTICS

- **Room**
 - The Endocrine Society will assign the symposium and slide review session room
 - The symposium room will be set up with rounds that seat 10 people each and a stage with a table and lectern
 - Any costs incurred to change the standard room layout will be covered by the MEC
- **Registration**
 - The Endocrine Society will manage/contract advance and onsite registration
 - Registration headcount will be provided to the MEC one week and two weeks before the program date
 - Registration demographics will be provided to the MEC two weeks after program completion
- **Audio/Visual**
 - The MEC will manage/contract the Audio and Visual aspect of the symposium
- **Food and Beverage**
 - The MEC will manage/contract food and beverage for the symposium
- **Inbound and Outbound packages**
 - The MEC will manage/contract any program related inbound and outbound packages

FACULTY CORRESPONDENCE AND CONTENT DEVELOPMENT

- **Selecting Faculty**
 - The Endocrine Society will appoint a Special Programs Committee (SPC) liaison to oversee the program. The SPC liaison will select the Program Chair
 - The Program Chair, with the SPC liaison, will determine accompanying faculty
 - The Endocrine Society will manage the invitation and confirmation process for the program chair and faculty
 - **The MEC may not contact faculty members unless written permission to do so is granted by the Endocrine Society** (failure to abide by this requirement may result in cancellation of the symposium, withdrawal of the CME accreditation, and can jeopardize eligibility for involvement with future programs). Should permission be granted, the Endocrine Society should be copied in all communications to faculty.
- **Conflicts of Interest**
 - The Endocrine Society will collect faculty and MEC staff disclosure information and will resolve/manage all conflicts of interest
 - 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 complete an online Financial Disclosure Form prior to contributing to that activity (provided by the Endocrine Society)
 - Additional information about how the Endocrine Society manages Conflicts of Interest can be found in Appendix B
- **Program Development**
 - Upon confirmation of all faculty by the Endocrine Society, the MEC will schedule a conference call with the complete faculty and Society staff to discuss activity agenda, content, learning objectives, and logistics
 - After the conference call, the MEC can contact the faculty, but must copy Endocrine Society staff on all email correspondence and content development correspondence. Likewise, Society staff must participate in all conference calls with faculty.
 - The MEC will work with the faculty to facilitate development of symposium materials. Endocrine Society staff must be copied on ALL communications, including conference calls, between the MEC and faculty
- **Travel**
 - The Endocrine Society will facilitate faculty travel by providing faculty with instructions for booking their flights and hotels
 - The MEC will book their staff's travel for the program (lodging, transportation, etc)
- **Slide Review**
 - The MEC will submit presentation slides to the Society for review and approval 2 weeks prior to the symposium
 - The MEC will hold a teleconference slide review with faculty and society representatives one week prior to the symposium
 - The MEC will hold an onsite slide review session and will invite faculty and society representatives to participate
- **Recording**
 - If funded, sessions will be digitally recorded by the Society for archival purposes.
 - The Society will obtain permission from the faculty before recording the sessions.
 - No other recordings are permitted without prior permission

MARKETING

A. General

- The MEC may develop marketing materials for the activity
- The MEC will develop, coordinate, print, and ship program materials (e.g., handouts, flash drives, etc.) to the meeting site
- The Endocrine Society must review and approve all marketing-related materials, including signage, promotional material, and slides for handout production and presentation in advance of printing/distribution. **Material will require at least 5 business days for review.**

B. ENDO 2020 Meeting and Expo Guide

- The Endocrine Society will compile all ads into the Meeting and Expo Guide, which will be distributed to attendees at registration. Costs for this item are included in the Society's budget format.

C. Doctor's Bag Inserts

- The MEC should develop and print Doctor's Bag inserts and provide to A. Fassano to be distributed in the Doctor's Bag before the program.
- The insert must be provided to the Endocrine Society for approval 45 days before the program date.
- Costs for this item are included in the Society's budget format; the MEC is responsible for costs associated with printing and shipping the insert.

D. 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.
- The MEC will provide one 28"x44" sign to be placed outside of the meeting room and two 22"x28" signs to be included on the CMES wall and in the foyer.
- The signs must be provided to the Endocrine Society for approval 45 days before the program date.
- No additional product or promotional information may be distributed.

E. 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.

ACCREDITATION AND EVALUATION

- The Endocrine Society will serve as the sole ACCME-accredited provider
- The Endocrine Society will develop, distribute, and process the activity evaluation and CME certificates for the attendees (unless otherwise agreed upon by the parties)
 - The standard evaluation form is included in the Ancillary Symposia Information Packet.
 - MECs can make changes, pending approval of the Endocrine Society
 - All evaluations are hosted online. The survey link will be provided to the MEC to include in the handout material. Attendees will receive an email with the survey link following the program.
- The MEC will create a final outcomes report (and interim report if requested) for the commercial supporter.
 - The Society will provide attendance and evaluation data for inclusion in the report

- All reports must be in the format required by the funder's online grant system. Supporting documentation can be provided and will be provided as an attachment (if allowed by supporter).
- The final outcomes report is to be submitted 60 days after the program, or per supporter guidelines
- The Endocrine Society is also able provide ABIM and ABP MOC points, if requested.

FINANCIAL

- **Budget**
 - *The budget provided is an estimate based on ENDO 2019's budget. The Endocrine Society will review and revise MEC budgets once ENDO 2020 vendors provide final estimates. The Endocrine Society will notify the MEC if any budget changes are required before submitting to the funder.*
- **Funding**
 - 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.
 - Commercial supporter will make initial payment for the educational grant per:
 - The grant office standard operating procedures
 - Once the Society receives payment from the commercial supporter, the MEC may request 50% of its estimated budget.
 - If the MEC receives the payment from the sponsor, the MEC must provide the Endocrine Society with their portion of the program budget 30 days prior to the program
- **Reconciliation**
 - The MEC will submit financial reconciliation in Society budget format and final invoice within 8 weeks (or earlier if required by the funder) following the event
 - Once the Society receives the final payment from the commercial supporter, the Society will provide final payment to the MEC
 - If the final reconciliation 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 then hold final payment to the MEC until final reconciliation is received. The MEC will not be reimbursed for more than the budgeted amount.
- **Physician Payments Sunshine Act**
 - The MEC will comply with all supporter required Physician Payments Sunshine Act requests
- **Honoraria and Travel Reimbursements**
 - The Society will serve as sole payer of speaker honoraria and travel reimbursements.

CANCELLATION POLICY

In the event that the supporter withdraws its support of the planned program, the Society will impose a cancellation fee of \$4,500 and out-of-pocket expenses incurred to the commercial supporter.

CONTACT

All parties interested in collaborating with the Society should email Rachel Slamon, Manager, Development and Strategic Partnerships at rslamon@endocrine.org to express interest or any questions regarding submission.

APPENDICES

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 18,500 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 Chair, who is selected by the Society's Special Programs Committee (SPC). The Program Chair 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)
- Internists
- Primary Care Physicians
- Endocrine Nurses
- 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 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 a follow-up survey 6-8 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.

ENDURING ACTIVITY DESCRIPTIONS

ENDO Session Recordings

The ENDO 2020 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 and education.endocrine.org. This CME-accredited enduring activity will be available for 12 months following activity launch.

PROMOTIONAL MATERIAL

The Endocrine Society will provide the following marketing opportunities for all CMES symposia at ENDO 2020, if the activity is developed following the timeline listed in prior sections of the application guidelines.

- Print
 - Doctor's Bags inserts
 - Support must be received 45 days before program to acknowledge support
 - *ENDO 2020 Meeting and Expo Planner* (7,500+)
 - Support must be received 45 days before program to acknowledge support
 - ENDO Daily Schedule (a supplement to the Daily Newspaper) (~4,500 daily)
 - On-site signage (8,000+)
- Digital
 - Announcement in the Worldwide Endocrine Events Calendar on the Society's website (100,000+ unique visitors monthly)
 - ENDO 2020 scientific program website (95,000+ unique visits)
 - Pre-Meeting Announcements (4,600+/issue)
 - Promotion in emails sent daily during ENDO 2020 (4,600+ per email)
 - ENDO App pageviews (1,000,000+)
 - Social Media Promotion
 - Facebook (27,000+ followers)
 - Twitter (16,000+ followers)
 - Instagram (1,600+ followers)

APPENDIX B: CONFLICTS OF INTEREST

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.