



Application for Educational Endorsement & Policy on Educational Activities

Please refer to Policy on Educational Events and Activities for specific definitions, processes and rules that apply to ISES involvement in any educational event or activity. Complete this application form in its entirety and return to: info@isesonline.org.

Date of Application_____

Please Print or Type (append additional page[s] as necessary)

Category of Request:

Promotion/Marketing Exchange Endorsement Scientific Collaborative Joint/Co-Sponsorship

Full Name of Host Organization, Society, Individual, or Group Requesting ISES Participation:

Contact Person(s)_____ Website_____

Address_____ Suite_____

City_____ State/Province_____

Country_____ Postal/Zip Code_____

Telephone #_____ Fax #_____

Meeting/Educational Activity Date(s)*_____ Location_____

Time and Length of Activity (if session or portion of meeting agenda) _____

Meeting/Activity Title_____

Course/Session/Program Directors:

Name_____ Affiliation_____

Phone_____ Email_____

Name_____ Affiliation_____

Phone_____ Email_____

Audience (check all that apply): Estimated Number of Attendees_____

Physician Nurse Technician Industry Resident Research Other _____

*Physician Type(s): Vascular Surgery Cardiology Radiology Angiology Generalist

Other_____

Please submit a copy of preliminary program or announcement with this application and any other documentation required based on category of application.

Disclosure of Corporate Involvement/Sponsorship:

Endorsements received from other institutions or societies for this event or activity:

Will this event or activity be?

- Accredited by the Accreditation Council for Continuing Medical Education (ACCME) or another continuing education accrediting organization?
Yes No Other Organization _____
- Co-sponsored or co-organized by another organization/society?
Yes No Other Organization _____
- In English or with simultaneous translation? Yes No

Is there currently at least one ISES member on the Organizing or Scientific Committee for the activity?

No Yes Name _____

Will the format of this meeting or educational activity include: (check all that apply):

- Scientific sessions with peer-reviewed abstracts Case presentations or demonstrations
 Panel discussions Debate Other specify:

The undersigned acknowledges receipt of the ISES Policy on Educational Events and Activities. Written response from the INTERNATIONAL SOCIETY OF ENDOVASCULAR SPECIALISTS will be forthcoming within 30 days of receipt of this application.

Print Name

Signature

Title or Capacity Within Host Organization/Society

Date

Please return completed form with required documentation to:

INTERNATIONAL SOCIETY OF ENDOVASCULAR SPECIALISTS (ISES):

6593-19 Powers Avenue | Jacksonville, FL 32217 | USA

Phone: 337.541.2440 | info@isesonline.org

Adopted: February 2013



ISES POLICY ON EDUCATIONAL ACTIVITIES

The mission of the International Society of Endovascular Specialists (ISES) is to promote and enhance education and training in the endovascular field. The ISES name and reputation are valuable assets to our members and the global community, who have come to appreciate our achievements, objectivity, reputation, and status. As such, ISES values the exchange of science and knowledge, in the form of organized activities, such as conferences, workshops, and courses. ISES would be pleased to consider involvement in other educational events of high scientific and educational quality that benefit the organization and endovascular specialists.

ISES does not currently seek continuing medication education (CME) credits for educational events outside those organized independently of jointly/co-sponsored by the Society, endorse courses leading to a qualification, or endorse commercial events.

ISES has identified four types of educational activities that a society, group, member, or individual may request the involvement of ISES in programming:

- A. Promotional/Marketing and Exchange
- B. Endorsement
- C. Scientific Collaborative
- D. Joint/Co-sponsorship

Definitions of Categories

A. Promotional/Marketing Exchange

For Promotional/Marketing Exchanges, the Society will implement reciprocal Promotional/Marketing Exchange of ISES or JEVT materials with the organization. The organizers may not utilize the Society's name or logo in association with the meeting.

Promotional/Marketing Exchange benefits may include, but are not limited to exchange of:

1. Website listings
2. Advertising
3. Email blasts
4. Distribution of materials
5. Exhibit/booth exchange

B. ISES Endorsement

ISES endorsement is defined as educational events and activities that have demonstrated sufficient scientific relevance and quality of the planned program in relation to the Society's mission and vision. In this instance, the meeting organizer may use the Society name and logo as defined in this policy.

The Executive Director will provide a summary of all endorsed meetings to the Committee and ISES Board on a regular basis.

Organizers of educational activities may be entitled to receive benefits from endorsement by ISES:

1. Official endorsement of the event displaying the ISES name and logo
2. Assistance with promotion of the meeting including items listed in Promotional/Marketing category.

In the ISES official endorsement, it must be made clear to the attendees and industry partners that the Society is not responsible for the organization of the event. ISES must receive a copy of all promotional material that contains the name and logo of ISES for review and approval prior to publication.

ISES requests organizers of events to consider offering the following items in their endorsement applications, many of which may attract additional interest in and attendance to the activity:

1. Offer reduced registration fees to ISES members
2. Feature the name and logo of ISES on all publications of the meeting with the words 'Endorsed by'
3. Include ISES materials in the delegate bags, registration documents, and future meetings tables
4. Offer ISES a complimentary booth or table at the event for display of materials to promote ISES activities, membership, and the Journal
5. Quid pro quo in exchange of other promotional benefits can be proposed and considered by the Committee.

These guidelines should provide a basis for seeking formal endorsement from ISES.

The organizer(s) agree to:

1. Include at least one Chairman or Director of the educational event who is a current ISES member
2. Credit ISES for its endorsement of the meeting in all-meeting publications and announcements, including promotional brochures, website, and in newsletters
3. Provide ISES with copies of all meeting literature, including program, abstracts, proceedings, and promotional material
4. Provide one complimentary page in the meeting program or other agreed upon promotional materials or publication for an advertisement by ISES

C. Scientific Collaborative

Scientific collaborative is defined as an educational activity that involves the participation of ISES in the planning of a scientific agenda for an approved session or portion of an existing meeting or workshop.

Participation of at least one ISES Board or Committee Member is required in the opening and/or closing remarks, and in the Scientific Program.

Each of the criteria, benefits, and requirements listed in categories (A) Promotional/Marketing Exchange and (B) endorsement apply to scientific collaborative applications.

D. Joint/Co-Sponsorship

Educational events that have an agreed upon level of shared organizational responsibility, scientific program planning, resource allocation, and financial obligations may be organized by ISES as Joint or Co-Sponsored activities.

Although ISES is not an ACCME accredited provider, the Society adheres to the guidelines and policies set forth by ACCME regarding development and implementation of educational activities for joint or co-sponsored activities. ISES by agreement can apply for direct accreditation from its accredited provider if CME accreditation is needed and/or requested.

1. Guidelines and Policies for Joint or Co-Sponsorship of an Educational Activity

- a. Member(s) of the ISES Committee and staff must be fully involved in the planning process for the program.
- b. Educational activity must be developed and conducted in compliance with ACCME guidelines and policies.
- c. Comparable or complementary, sharing of resources (e.g. human resources, technological resources, advertising/marketing resources, etc.) with potential joint sponsor.

2. Eligibility

- a. Eligibility for Joint/Co-Sponsorship shall be limited to societies or other organizations whose primary function is education and who have established policies for conducting sound, non-commercial educational programs; or to specific entities that the ISES approaches to develop an educational program meeting the required elements stated in this policy.
- b. Programs by individuals, study groups, or entrepreneurial organizations will not be considered for joint or co-sponsorship by ISES unless the Society decision to partner with that group to develop a program is through established channels and with suitable financial arrangements.

3. Policy

- a. It is the responsibility of the requesting organization to provide written documentation demonstrating compliance of all ACCME requirements for CME accredited programs. ISES requires each organization applying for joint or co-sponsorship of an educational activity to submit the completed application and provide requested materials supporting the request.

- For CME activities, approved applicants will be required to comply with the ACCME's Essential Areas and their Elements, the ACCME's Standards for Commercial Support and the ACCME's Accreditation Policies
- b. Joint or Co-Sponsorship requires full participation by ISES in the planning, organization, and implementation of the project. As a co-sponsor, the ISES must have the opportunity to:
 - I. Organize and participate on a joint planning committee(s) and participate in development and selection of the committee chairperson(s), scientific committee and faculty. Additional committee assignments may be required for the purpose of planning the project, developing the scientific agenda, determining method and selection of participants, determining the goals, objectives, timetable, and resource allocation.
 - II. Participate in all meetings that are related to the project whether in person or via telephone.
 - III. Review, comment, and approve any draft documents that are produced as a result of the project.
 - IV. Jointly publish official educational/scientific proceedings of the project if applicable (Official Statements, Position Papers, Clinical Guidelines, Workshop Reports, etc.) as mutually agreed.
 - V. Be identified as a sponsoring organization of the project in all documents.
 - VI. Place specific language provided by ISES prominently on the cover of all promotional materials, including the educational activity program and handout materials. Promotional materials will conform to requirements established for use of the ISES name and logo.
 - VII. Audit, at the sole discretion of ISES, the finances of the educational activity. This may include review of all invoices, receipts, and expenditures that could be associated with all income, expenses, and commercial support.

4. Application Process

- a. The Application for Joint Sponsorship of an Educational Activity and supporting materials must be submitted to ISES Office no less than nine (9) to twelve (12) months prior to the planned start date of the educational activity.
- b. An application fee of \$2,500 (USD) must accompany the official application.
- c. The ISES Committee will appoint a minimum of one ISES representative who will work with the organization to develop an official proposal to be presented to the Committee for review.
- d. The appointed ISES representative will work directly with the Executive Director and be responsible for completion of a formal proposal (including budgets) for review by the Executive Strategic Council and final decision by the Board of Directors.
- e. Execution of a Letter of Agreement detailing all of the above items as well as other specific requirements and duties of both ISES and the applicant organization is required prior to commencement of any activity related to the event. Detailed financial agreement outlining the process for reporting income, expense, and reconciliation of accounts will be required in the Letter of Agreement. The Letter of Agreement shall be signed by the officer, representative, or staff member who has authorization to do so with the partnering organization.

General Policy

1. Any society, group, member, or individual who organizes a scientific or educational activity may apply to ISES for consideration of a request for the Society's involvement. Educational events may be of any size but must address topics of relevance and fulfill the highest scientific and educational standards.
2. For all categories, with the exception of Promotion/Marketing Exchange, requests for ISES involvement in an educational activity or event outside those solely sponsored by the Society require written request submitted to the ISES Office, review, and approval by the Strategic Executive Council and Board.
3. With the exception of the Joint/Co-Sponsored category, ISES has no responsibility or obligation for any expense or for the procurement of financial support for the educational activities and/or events. ISES endorsements and collaborative partnerships must not be specifically used to solicit industry support or funding. If industry support or funding is requested for the day(s) or sessions in which ISES is involved, the Society must be notified in writing. In this instance, a separate proposal will be created, reviewed, and approved in writing prior to implementation or ISES will withdraw its agreement with the organizer. Deviations from this financial policy will require full review and approval of the Strategic Executive Council and ISES Board of Directors.
4. Applications and requests for ISES involvement must be submitted by the person(s) authorized to request such on behalf of the organization.
5. ISES members involved in projects for or with other organizations are not authorized to commit ISES to any involvement unless a written agreement exists between that organization and ISES. ISES members involved in projects for or with other organizations must present a written proposal to the Strategic Executive Council in writing via the ISES Office for review and processing prior to committing ISES at any level.
6. ISES is unlikely to participate in any educational event it deems in direct competition with its own society activity(ies).
7. ISES reserves the right to withdraw its participation if it determines that the final program does not meet the Society's mission or requirements stated within this document.
8. ISES must be notified in writing if there are changes to the goals, objectives, or leadership of the educational activity or event.
9. All requests for ISES involvement need to be submitted at the earliest stage of planning the educational event.

10. The following information or materials should be submitted regarding the proposed educational event:
 - a) Title
 - b) Dates and location
 - c) Director, chairmen, scientific committee list
 - d) Educational objectives
 - e) Overview of meeting/event
 - f) Anticipated audience specialty(ies)
 - g) Estimated number of attendees
 - h) Disclosure of any corporate involvement or sponsorship
 - i) Endorsement of other academic organizations or societies; and
 - j) Sample of initial announcement (if available)

11. ISES Organizers of recurring educational events must request approval by ISES for each occurrence of the activity regardless of prior consideration.

12. ISES will provide appropriate statements for use in promotional materials. All promotional materials for the educational activity must be reviewed and approved by ISES prior to publication.

13. ISES policy prohibits providing ISES member lists to third parties or using the ISES name or logo in any manner not specifically authorized in advance by ISES.

14. All requests for ISES involvement in an educational event or activity must:
 - a) Fit within the ISES mission, policies, strategies, and values
 - b) Meet an educational need that can be clearly identified and will not conflict or compete directly with any ISES project or event
 - c) Develop synergistic relationships that are in the best educational interests of ISES
 - d) Be perceived by ISES Members to confer an adequate level of scientific benefit that meets the standards of ISES
 - e) Not likely to generate complaints or criticism against ISES