

Policy 2.4
Original Adoption and Latest Review July 2016

SPONSORSHIP AND ENDORSEMENT POLICIES

General Provisions and Clarification of Terminology:

1. Definitions
 - a. For purposes of Association policies, the term “sponsor” is used to refer to situations in which the Association initiates the event, activity, or product, or is involved from the beginning and is the sole or primary sponsor.
 - b. For purposes of Association policies, the term “cosponsor” is used to refer to situations in which the Association does not initiate but is involved from the beginning—with at least one other organization—in the planning, development, and execution of the event, activity, or product.
 - c. For purposes of Association policies, the term “endorse” is used to refer to situations in which the Association is asked to express publicly its approval of (or support for) an event, activity, or product that is already substantially planned or has been developed by an outside entity.
2. The outside entity requesting sponsorship or endorsement will be required to provide all relevant and necessary information in a timely fashion (30 days in advance for most requests) to allow the Association to determine if the request meets the criteria set by the Association in its sponsorship or endorsement policies.
3. The outside organization requesting sponsorship or endorsement of one of its activities or products must use Association-approved language when characterizing AACC involvement in any publicized descriptions (i.e., sponsorship, cosponsorship, or endorsement, as determined by the Association).
4. The sponsorship or endorsement agreement between the Association and another entity must be in writing and executed by both parties and must include all the conditions and obligations involved as well as any variations from these policies as may be approved for a specific agreement by the Board/Executive Committee.
5. Association staff will conduct an annual review of all ongoing sponsorship and endorsement activities.

GENERAL APPROVAL PROCESSES SPONSORSHIP/COSONSORSHIP

1. Requests for sponsorship or cosponsorship must be received at least 30 days in advance of the requested decision deadline.
2. All requests must clearly describe the organization, design, and participants of the proposed activity, and/or processes and procedures for development, in sufficient detail as to allow an informed decision by the Association.
3. The request will be reviewed by staff and/or AACC president and, if necessary, referred to the appropriate AACC core committee, which will either itself conduct the initial review or assign the request to the relevant body under its purview.
4. Upon review by the assigned governance group and approval of the core committee, the core committee's decision will be communicated to the Board of Directors, which will conduct additional deliberations if necessary.
5. The decision whether to sponsor/cosponsor will be communicated to the requesting organization.
6. This process must be followed separately for the initiation of a sponsored/cosponsored activity and for any enduring products resulting from the activity. Approval to sponsor or cosponsor an event or activity does not confer approval of any enduring products.
7. AACC retains ownership of any documents/products resulting from Association-sponsored conferences and retains all publication rights. AACC reserves the right to negotiate with partners on publication terms for cosponsored events.
8. AACC reserves the right to remove its name from any event, activity, or enduring product at any time, should the Association deem it necessary or prudent to do so. AACC further reserves the right to issue a dissenting report for any outcome/product.
9. Outside supporters/funders of the event or product (i.e., funding sources other than the Association or other sponsoring/cosponsoring organizations) must have no influence over content or speaker/participant selection.

Endorsements:

1. Requests for endorsement must be received at least 30 days in advance of the requested decision deadline.
2. All requests must include a detailed program or completed (or nearly completed) product for consideration. Descriptions of procedures followed in the development of the program or product, including committee/speaker selection, conflict-of-interest management, and funding sources must be provided.
3. The request will be reviewed by staff and/or AACC president and, if necessary, referred to the appropriate AACC core committee, which will either itself conduct the initial review or assign the request to the relevant body under its purview.

4. Upon review by the assigned governance group and approval of the core committee, the core committee's decision will be communicated to the Board of Directors, which will conduct additional deliberations if necessary.
5. The decision whether to endorse will be communicated to the requesting organization.
6. This process must be followed separately for events and for any enduring products resulting from the event. Endorsement of an event does not automatically confer endorsement of any enduring products.
7. AACC reserves the right to negotiate with partners on publication terms for endorsed products.
8. AACC reserves the right to remove its endorsement from any event or product at any time, should the Association deem it necessary or prudent to do so. AACC further reserves the right to issue a dissenting report for any outcome/product.
9. Outside supporters/funders (i.e., sources other than the Association or other sponsoring/cosponsoring organizations) must have no influence over content or speaker/participant selection.

REQUIREMENTS FOR CONFERENCES

Funding:

1. Conferences sponsored or cosponsored by the Association shall be funded only by unrestricted funds, including the following mechanisms:
 - a. Association funding; and/or
 - b. Funding provided by Association partners or other related non-profit organizations invited to participate; and/or
 - c. Government or foundation grants; and/or
 - d. Unrestricted educational grants from for-profit industry funders – provided that these funders have no influence over the content of the event, the speaker/participant selection, or the content of the report or other documents produced as a result of the event.

Conflict of Interest Disclosure and Management:

1. All conferences will follow CME-accreditation disclosure requirements for all participants even if the event does not offer CME credit,
2. All documents produced by conferences will include disclosures for all participants,
3. The majority of event participants must be without conflict of interest in the matter under study,
4. Participants with conflicts of interest may be included in conferences as long as the appropriate public disclosures are made and as long as the planning committee appropriately manages conflicts of interest so as not to compromise the credibility of the event or the Association.

Sponsorship/Cosponsorship:

Requirements specific to sponsored conferences:

1. Whenever possible, the Association will invite related organizations to participate, as deemed appropriate by the planning committee of the event, subject to approval by the managing core committee.
2. Other organizations will participate with the Association with the understanding that they may withdraw their names should they not agree with the report and recommendations.

Requirements specific to cosponsored conferences:

1. Requests for cosponsorship will be approved only under the following conditions (all required):
 - a. That AACC will name its own representative(s) to participate in the event; and
 - b. That its representatives will be permitted to participate fully in the development and execution of the event and in any follow-up activities; and,
 - c. That the Association may withdraw the AACC name or have the option to issue a dissenting report should the Association not agree with the report or other outcomes of the event.

Endorsement:

1. The Association will consider endorsement of conferences and/or enduring products provided all funding and disclosure requirements are met, and provided the content of the conference or enduring product meet with the approval of the appropriate core committee or of the Association's Board of Directors (or Executive Committee).

Reciprocity:

1. Association endorsement will normally include a provision for a corresponding advantage to the Association, to be determined on a case by case basis (e.g., complimentary registrations; travel grants awarded by the Association; provision of attendee list; complimentary exhibit space; rights to publish outcomes of the event, etc.). If marketing support is granted in addition to the "good name" of the Association, additional return to the Association may be involved.

REQUIREMENTS FOR GUIDELINES

Desirability of Collaborating with Clinical Societies on Clinical Practice Guidelines:

1. The Association believes that laboratory medicine is integral to effective patient care and disease management, and that collaboration with clinicians on clinical practice guidelines is vital to the future of the field and to ensuring better health and healthcare, pursuant to the Strategic Plan.
2. The Association should identify and pursue opportunities to partner with clinical societies on the development of clinical guidelines, ensuring that the latest knowledge in laboratory medicine is applied to patient care.

Funding:

1. The Association shall sponsor or cosponsor only guidelines funded by unrestricted funds from non-industry sources, including the following mechanisms:
 - a. Funding from the collaborating society or other professional-society partners; and/or
 - b. Association funding; and/or
 - c. Government or foundation grants.

Conflict of Interest Disclosure and Management:

1. All sponsored or cosponsored guidelines will follow CME-accreditation disclosure requirements for all participants,
2. All guidelines will include disclosures for all participants,
3. The majority of guideline participants must be individuals without conflict of interest in the matter under study,
4. Participants with conflicts of interest may be included in the development of guidelines as long as the appropriate public disclosures are made and as long as the guideline development committee appropriately manages conflicts of interest so as not to compromise the credibility of the event or the Association.

Additional Considerations:

1. Opportunities for collaboration may arise through any AACC member having contact with clinical colleagues and knowledge of impending clinical guidelines.
2. The Clinical Societies Collaboration Committee will actively seek opportunities to collaborate with clinician organizations in the development of practice guidelines.
3. Guideline collaboration activities will be managed through the Evidence-Based Laboratory Medicine Subcommittee (EBLMS, reporting up through the Science & Practice Core Committee, in collaboration with the AACC Academy).
4. When considering its recommendation on AACC participation in a clinical guideline, the EBLMS will take into account the proposed development process and whether the guideline will clearly outline

specific evidence categories, e.g. Category 1 (RCT, multi-center trials, and meta-analyses), Category 2 (published data), and Category 3 (expert opinion).

5. Evidence may have been reviewed and/or evaluated by either a federal agency (i.e., AHRQ) or an outside research consultant as well as by members of the guideline writing panel.
6. The Association reserves the right to negotiate with guideline partners on publication terms and rights for cosponsored guidelines.
7. The Association retains the right to withdraw its name from cosponsored guidelines should they not meet the approval of the EBLMS and/or the Board/Executive Committee.
8. A schedule of periodic review of Association sponsored and cosponsored guidelines will be developed and followed by the EBLMS.

Sponsorship/Cosponsorship

1. AACC will sponsor or cosponsor guidelines only under the following conditions (all required):
 - a. The Association will name its own representative(s) to participate in the guideline development; and
 - b. Its representatives will be permitted to participate fully in the development of the guideline; and,
 - c. That the Association may withdraw its name or have the option to issue a dissenting report should the Association not agree with the guideline.

Endorsement:

1. The Association will consider endorsement of clinical guidelines produced by another organization(s) under the following conditions:
 - a. The evidence categories utilized in the development of the guideline are clearly identified;
 - b. Evidence was reviewed and/or evaluated by either a federal agency (i.e., AHRQ) or an outside research consultant as well as by speakers/participants in the event;
 - c. The guideline is periodically reviewed according to a published schedule;
 - d. Appropriate conflict of interest disclosure and management procedures were followed, i.e., appropriate public disclosures are made and conflicts of interest are managed so as not to compromise the credibility of the guideline or the Association.
2. If guidelines are not produced under conditions 1 a-d above, the Association will consider endorsement if:
 - a. The guidelines were developed according to a method approved by the EBLMS, SPCC, and Board; and
 - b. The EBLMS and SPCC recommend the guidelines for Board approval.

Reciprocity:

1. Association endorsement of a guideline will normally include a provision for a corresponding advantage (return, financial or non-financial) to the Association, to be determined on a case-by-case basis.

***Educational materials or other products developed outside Association auspices may also be considered for endorsement, under the general process and following standard disclosure and funding requirements, with additional specific requirements contingent upon the type of material under consideration.**

Adopted February 8, 2019

Unchanged from prior version of July 2016