

To: Medical Education Company Partner

From: Endocrine Society, Development & Strategic Partnerships, ATTN: Rachel Kelley

Date: October 5, 2022

Endocrine Society greatly values our medical education company (MEC) partners whose instructional design expertise has consistently resulted in impactful programming for healthcare providers in endocrinology. To enhance our signature ENDO 2023 meeting, we invite MECs to participate in providing innovative satellite symposia to congress attendees.

About ENDO

ENDO2023

JUNE 15-18, 2023 CHICAGO, IL

ENDO is the signature annual meeting of the Endocrine Society and a highly sought-after international venue for highlighting the latest in endocrinology research and clinical care. In 2022, we welcomed top names in the fields of clinical endocrinology and hormone science research to deliver more than 68 symposia, meet the professor and meet the scientist, master clinician, debate, oral and rapid-fire sessions, and approximately 2000 on-demand and poster+ abstracts. Nearly 7,500 attendees (approximately 75% US and 25% from 92 other countries) attended in-person or virtually.

Our [ENDO 2023](#) meeting is planned as a **fully in-person** meeting to facilitate the most engaging and collaborative congress possible. Topical areas include, but are not limited to, Adrenal, Bone, Cardiovascular, Diabetes, Parathyroid, Neuroendocrine and Pituitary, Pediatric, Obesity, Reproductive, and Thyroid Endocrinology.

MECs at ENDO 2023

Endocrine Society is responsible for and accredits all education at the ENDO meeting. Thus, MECs and Endocrine Society work in partnership to provide satellite symposia. *Endocrine Society does not use a symposium slot-fee model.*

Request for Proposal - Process & Important Dates



Request for Proposal – Important Dates & Steps

<p><u>October 2022 – December 2022</u></p> <p>MEC Concept & Budget Application for ENDO 2023 Satellite Symposium sent to Endocrine Society</p>	<ol style="list-style-type: none"> 1. Complete “MEC Concept Submission” Smartsheet Form to indicate MEC company name, tentative symposium title, relevant therapeutic area, and proposed audience and learning objectives. (If interested in multiple topics, please complete 1 submission per topic.) 2. Endocrine Society staff will respond within 2 business days with a concept paper template for MEC to complete and send back. An itemized budget will also be attached for MEC to use to build in their partnership fees. 3. MEC submits concept paper & budget to Endocrine Society for review.
<p><u>Approximately 2 Weeks after Concept Application</u></p> <p>Special Programs Committee (SPC) Review & Feedback to MEC</p>	<ol style="list-style-type: none"> 4. Endocrine Society member experts on the SPC review concept paper to ensure timely, evidence-based, unbiased learning needs are addressed in the proposed program. Endocrine Society staff review both the concept paper and budget. 5. Feedback/comments on concept and budget are provided to the MEC partner.
<p><u>No Later Than January 16, 2023</u></p> <p>MEC Full Proposal and Finalized Budget to Endocrine Society for Final Review</p>	<ol style="list-style-type: none"> 6. MEC provides a full written proposal to Endocrine Society for final review. MEC provides final budget at this time as well for final review. 7. MEC and Endocrine Society formalize Memorandum of Agreement (MOA).
<p><u>No Later Than January 31, 2023</u></p> <p>Final Submission to Funder(s) by MEC (NOTE: If submitting to a formal RFP or CCP, please follow specific guidance and timeline)</p>	<ol style="list-style-type: none"> 8. MEC submits fully reviewed and approved grant package to funder(s) unless otherwise specified by funder(s) guidelines.

***** Please plan to receive funding decision(s) no later than March 17, 2023 *****

Upon Official Approval by Commercial Supporter(s)

<p><u>February 2023/ Spring 2023</u></p>	<p>Endocrine Society will:</p> <ul style="list-style-type: none"> • Provide MEC with date and time options for the program once ENDO full schedule is finalized. Timeslot preference will be based on when MECs received funding approval. • Invite Program Chair(s) • Invite faculty, as determined by Program Chair • Send confirmations to Program Chair and faculty • Collect faculty bios, headshots, and COIs <p>MEC will:</p> <ul style="list-style-type: none"> • Receive funds from corporate supporter(s) • Provide Endocrine Society with 90% of agreed upon fees per MOA
<p><u>Once Program Chair & Faculty Confirmed</u></p>	<p>MEC will:</p> <ul style="list-style-type: none"> • Schedule conference call with faculty, peer reviewer, and Endocrine Society staff on activity learning objectives, agenda, content, and logistics • Lead continued program development (with Endocrine Society staff and Society-selected peer reviewer copied on all correspondence)
<p><u>45 Days Before Program</u></p>	<p>MEC will:</p> <ul style="list-style-type: none"> • Submit digital materials (e.g., program visual/Expo Guide inserts) to Endocrine Society for review/approval
<p><u>14 Days Before Program</u></p>	<p>Endocrine Society will:</p> <ul style="list-style-type: none"> • Initiate symposium sign up and registration and provide headcount data <p>MEC will:</p> <ul style="list-style-type: none"> • Submit slide deck to Endocrine Society for formal peer review and approval
<p><u>3 Weeks After Program</u></p>	<p>Endocrine Society will:</p> <ul style="list-style-type: none"> • Provide symposium attendee demographics and evaluation results to MEC • NOTE: if additional reporting required by funder, Endocrine Society will accommodate
<p><u>8 Weeks After Program</u></p>	<p>MEC will:</p> <ul style="list-style-type: none"> • Provide Endocrine Society with final payment per MOA • Provide reconciliation in Endocrine Society budget format in addition to any required funder formats
<p><u>60 Days After Program</u></p>	<p>MEC provides outcomes report to Endocrine Society for review and approval and then submits to commercial supporter(s)</p>

At ENDO 2023 in Chicago, a MEC-led satellite symposium, with Endocrine Society as an educational partner, has an approximate *total* cost of \$400,000. This value will vary depending on scope of live and enduring programs. This total cost estimates all Endocrine Society and MEC fees. Of note, this total cost includes logistical expenses (~\$125,000 USD) already contracted between Endocrine Society and third-party vendors related to the Chicago hotel venue, food & beverage services, technology requirements, and enduring distribution. Again, as mentioned above, an itemized budget file will be provided after a MEC indicates interest in ENDO satellite symposia using this [Smartsheet form](#).

More information on satellite symposia and Endocrine Society services are provided in the appendices. We hope you indicate interest using the Smartsheet form and start these conversations soon! ENDO 2023 benefits from your participation, and we look forward to working with you.

Kind regards,

Rachel Kelley



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APPENDICES

- I = [ENDO 2023 SATELLITE SYMPOSIUM DETAILS](#)
- II = [SATELLITE SYMPOSIUM PARTNERSHIP COORDINATION](#)
- III = [MARKETING](#)
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- V = [FINANCIAL](#)

APPENDIX I: ENDO 2023 SATELLITE SYMPOSIUM

Location

- As of Fall 2022, the ENDO 2023 Annual Meeting is planned as a live, in-person congress in Chicago, IL. Certain components of the meeting will be recorded and offered in endured format several weeks after the live meeting. All satellite symposia will be live, in-person presentations at the Headquarters Hotel, available to everyone (member/non-member, meeting registrants/non-registrants), and have a Q&A segment.

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, provided that the full ENDO 2023 schedule has also been confirmed at that time.

ENDO 2023 Space Availability

- Each satellite symposium will accommodate 300 in-person participants.
- Satellite symposia will be held between June 15th -18th. Exact time slots will be based on the full ENDO 2023 schedule.
- Satellite symposia typically include a meal (~30 minutes) and 1.5 hours of educational content.
- If desired, the programs will be recorded and hosted on education.endocrine.org to extend reach as an enduring activity. (see [Appendix II](#)).
- ENDO 2023 satellite symposia are projected to reach 200+ live participants and 250+ enduring participants if hosted on education.endocrine.org. We highly recommend use of our preferred distribution partner, myCME, to extend enduring reach through our agreement for an ENDO 2023 Series Page. In general, the myCME ENDO 2023 Series Page would allow each enduring activity to reach approximately 1700+ additional enduring learners, but this estimate may vary based on therapeutic area. (See [Appendix III](#) for additional details)
- The Endocrine Society will make every effort not to schedule multiple symposia related to 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 2023 Attendance

6,000+ Scientific Attendees

7,500+ Total Attendees

APPENDIX II: SATELLITE SYMPOSIUM PARTNERSHIP COORDINATION

- The following satellite symposia information will be provided to the MEC upon approval of grant:
 1. Presentation Guidelines
 2. Front Matter Template
 3. Intro Slides Template
 4. PowerPoint slide design template
 5. Evaluation Template/Link
 6. Staff Disclosure of Financial Relationship & Resolution of Conflicts of Interest Form
- Prior to submission to commercial supporter, the MEC must provide the Society with:
 - Concept proposal
 - Full proposal (if concept is approved)
 - Proposed budget in Endocrine Society format (In addition to required funder budget formats as required)
 - Memorandum of Agreement (MOA) for ES/MEC partnership services and fees
- The MEC will submit proposal to the sponsor(s).
 - To the best of its ability, the Society will return all MEC applications with SPC review within two weeks of receiving materials.
 - Final proposals and supporting documentation are expected to Endocrine Society for final review **no later than COB January 16, 2023.** Deadline extensions are not to be expected.
 - The MEC will provide the Society with email confirmation of official submission of grant package to sponsor(s).
- The **MEC must be listed as the payee**
 - The MEC must provide the Endocrine Society with their portion of the program budget **within 30 days of receipt or 30 days prior to the program, whichever is sooner.**

LOGISTICS

- **Registration and Attendance**
 - The Endocrine Society will manage/contract advance and virtual registration.
 - Registration headcount will be provided to the MEC one week and two weeks before the program date.
 - Attendance demographics will be provided to the MEC three weeks after program completion.
- **Enduring Activity**
 - If desired, the program can be recorded by the Endocrine Society's ENDO 2023 platform contractor and hosted on education.endocrine.org. This option is included on the budget template in "OPTIONAL – Enduring Activity." Alternative enduring modalities are possible.

FACULTY CORRESPONDENCE AND CONTENT DEVELOPMENT

- **Selecting Faculty**
 - The Endocrine Society will appoint a Special Programs Committee (SPC) liaison to oversee the program and serve as the ACCME non-conflicted peer reviewer. 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 digital 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)

- **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.

- **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 virtual teleconference slide review with faculty and Endocrine Society representatives one week prior to the symposium.

- **Recording**
 - Sessions will be digitally recorded by the Society with the assistance of the digital platform representative.
 - The Society will obtain permission from the faculty before recording the sessions.
 - No other recordings are permitted without prior permission.

APPENDIX III: MARKETING

A. General

- The MEC may develop marketing materials for the activity.
- 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 the meeting. **Material will require at least 5 business days for review.**
- The MEC should send print materials no later than 6 weeks from ENDO 2023.

B. ENDO 2023 Meeting and Expo Guide

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

C. Program Guide Inserts

- The MEC should develop digital poster inserts and provide to Endocrine Society to be distributed on the ENDO 2023 conference platform.
- 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 template; 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 digital promotions. The Society reserves the right to deny any request and to edit promotional copy for consistency and accuracy.

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.

F. myCME ENDO 2023 Enduring Activities Series Page

- The Endocrine Society is collaborating with myCME on the creation of a proprietary Series Page to promote all of the supported activities on a single page within the myCME platform, using Endocrine Society's myCME account. This Series Page will alert clinicians that all of the activities originated at the 2023 Society event. Each of the activities on the page will help to promote the "sister" activities to the appropriate learners. In addition to each activity being a part of the Series Page, each activity will also have its own myCME page - this offers additional activity exposure and promotion.
- Additional 1700 participants and 400 completers are anticipated for an enduring activity included on this ENDO 2023 myCME series page. Specific estimates by learner type and therapeutic area can be provided upon request.
- This optional service is included in the Endocrine Society budget template.

APPENDIX IV: 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).
 - MECs may add questions required by other accrediting bodies, 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.
 - 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.

APPENDIX V: FINANCIAL

- **Budget**

- *The Endocrine Society will provide the MEC with ES budget fees. The MEC will include their fees for the program.*
- The budget must be drafted in the Endocrine Society budget template.

- **Funding**

- The MEC and Endocrine Society will be signatories on all LOAs. The MEC will be listed as payee on all submissions unless previously determined otherwise. Once the MEC receives funds from the commercial supporter, the MEC will provide Endocrine Society with 90% of anticipated fees as outlined above.
 - If Endocrine Society receives the payment from the sponsor, the Endocrine Society will provide the MEC with their portion of the program budget within 30 days or 30 days prior to the program, whichever is sooner.

- **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 MEC receives the final payment from the commercial supporter and the reconciliation is complete, the MEC will provide final payment to the Endocrine Society.

- **Physician Payments Sunshine Act**

- The MEC will comply with all supporter-required Physician Payments Sunshine Act requests.

- **Honoraria Reimbursements**

- The MEC will serve as sole payer of speaker honoraria unless previously agreed otherwise.

CANCELLATION POLICY

In the event that the MEC decides to no longer collaborate on the program, the Society will invoice the MEC for a cancellation fee of \$4,500 plus out-of-pocket expenses incurred for the program.