

**Policies for In-Kind Educational Grants to Other Organizations**  
**Approved July 25, 2016**

An In-Kind Educational Grant is foundational support from ISHLT to another organization in the form of up to 8 hours of medical or scientific educational program content, including educational format, session topics, presentation titles, teaching points, recommended speakers, and recommended session chairs for the other organization's use in conducting a meeting exclusively for educational purposes. The development of individual presentations is not a part of the In-Kind Educational Grant and is the responsibility of the faculty selected for the event.

**General Policies**

1. ISHLT's primary goal for providing In-Kind Educational Grants to other organizations is to deliver education to geographical areas where such expertise is not available locally AND where the local medical community does not have the contacts necessary to procure such expertise on their own. Only those Applications which are determined by ISHLT to meet this goal will be considered for an In-Kind Educational Grant.
2. In-Kind Educational Grants are available only for live (face-to-face) educational activities conducted by non-profit professional medical societies, governmental agencies/regulatory authorities, and non-profit, disease/therapy-oriented membership organizations, including patient organizations, not affiliated with any commercial entity or healthcare provider/organization/institution.
3. In-Kind Educational Grants are available only for meetings with a desired focus on 1) improving the care of patients with advanced heart or lung disease through transplantation, mechanical support and innovative therapies or 2) improving access to advanced therapies end-stage lung or heart disease
4. In-Kind Educational Grants are available only for meetings whose target audience is healthcare professionals and/or patients and for which registration is open to all relevant audiences. The Board may choose to provide an In-Kind Educational Grant for invitation-only events on a case-by-case basis, depending upon the justification for such audience limitation.
5. 1 day workshops/courses and individual sessions within a larger meeting will be considered for In-Kind Educational Grants. Regular (annual, bi-annual) meetings/congresses of the requesting organization's membership are not eligible for In-Kind Educational Grants.
6. In-Kind Educational Grants will be limited to a maximum of 8 hours of didactic educational content.
7. In-Kind Educational Grant decisions will be subject to final review and approval by ISHLT of the following:
  - \* the final date, time, location, educational content, program schedule, presenters and chairs, ancillary events such as exhibits and corporate sponsored events
  - \* the manner in which the program content was developed
  - \* the meeting's alignment with ISHLT's educational standards

\* the meeting's alignment with ISHLT's strategic goals

\* the meeting's compliance with these policies

ISHLT has the right to require changes to the above and/or withdraw the In-Kind Educational Grant if the requested changes are not made or compliance with these policies is not achieved.

8. Educational activities developed through an In-Kind Educational Grant may not be scheduled to take place within 8 weeks of an ISHLT meeting that offers the same or similar content or that draws from the same or similar audience.

9. Organizations applying for an In-Kind Educational Grant must explain what they believe are the need, purpose, and value of such a grant for their organization and for the desired meeting and how they meet the criteria described in Goal A above.

10. Meetings developed from an In-Kind Educational Grant may be endorsed and/or sponsored by other organizations/corporations ONLY if such endorsement is approved by the ISHLT Board of Directors in advance. The Board reserves the right to refuse to approve such endorsement without regard to merit.

11. Up to 30 minutes of program time must be provided to ISHLT for the purpose of presenting information to the audience about ISHLT and its programs and services.

12. A budget, including the anticipated # of attendees, the registration fees, the anticipated revenue from each source, and expenses by category must be provided to ISHLT at the time of Application, and final approval will not be granted without such information.

13. The ISHLT Board reserves the right to decline an application for an In-Kind Educational Grant without regard to merit.

14. Content developed via an In-Kind Educational Grant may be used for one educational activity held one time only. Use of the developed content for additional educational activities is not permitted without prior approval from ISHLT

### **ISHLT Responsibilities**

15. ISHLT will provide an In-Kind Educational Grant to the host organization in the form of an up to 8 hours of scientific program content (format, session topics, presentation titles, recommended speakers and chairs) for the other organization's use in conducting an educational meeting for educational purposes only. This content shall be non-promotional and free from commercial bias. The development of individual presentation content is not a part of the In-Kind Educational Grant and is the responsibility of the presenter.

16. The educational goals, learning objectives, and scientific program content will be developed and selected by a Program Planning Committee appointed by the appropriate ISHLT Scientific Council(s). At least 75% of the Program Planning Committee must be ISHLT members selected by the appropriate

ISHLT Scientific Council(s). The degree of input, if any, from the host organization regarding content and presenters will be at the discretion of the ISHLT Scientific Council(s).

17. Qualified presenters and chairs will be recommended by the Program Planning Committee. At least 75% of the presenters and chairs must be ISHLT members.

18. ISHLT will extend the initial formal invitations to the ISHLT-member presenters and chairs. All ISHLT-member presenters and chairs will be required to abide by the ISHLT Conflict of Interest Policy regarding educational activities.

19. ISHLT will send up to three complimentary promotional eblasts about the meeting (content and artwork provided by the organizers) to the ISHLT membership and will post the meeting on the ISHLT web site.

### **Host Organization Responsibilities**

20. The host organization may, at the discretion of the Scientific Council, appoint up to 25% of the members of the Program Planning Committee.

21. The host organization will extend the formal invitations to the non-ISHLT-member presenters and chairs.

22. Once the ISHLT-member presenters and chairs are confirmed by ISHLT, the host organization will manage all subsequent communications and logistical arrangements related to the execution of the activity. All such communications must be copied to the designated ISHLT staff member.

23. The host organization will establish all fees for the event, including registration fees, exhibition fees, commercial support fees, etc.

24. A 30% discount off the registration fee must be promoted and provided to current and verified ISHLT members. ISHLT will provide a membership roster, updated monthly, to the host organization, for this purpose.

25. The host organization will organize, plan, and conduct the educational activity, manage all related logistical arrangements, collect all funds, and pay all expenses.

26. The host organization will provide funding to cover travel, hotel and related expenses for ISHLT-member speakers, chairs, and Program Planning Committee members, as well as complimentary meeting registration and a reasonable honorarium. Such funding must be paid by the host organization to the presenter/chair and may not be paid directly by any commercial entity to an ISHLT-member presenter, chair, or Program Planning Committee member.

27. The host organization agrees to display promotional materials provided by ISHLT in the public areas of the meeting, to distribute such materials to delegates, and to include @ISHLT on any tweets regarding the meeting.

28. The host organization agrees to provide a banner ad to ISHLT on any electronic meeting app, if available.

29. A list of all of the social media accounts (Facebook, Twitter, LinkedIn, etc.) where the educational activity will be promoted, and instructions on how to follow them, must be provided with the Application.

### **Educational Standards**

30. The educational content developed through an In-Kind Educational Grant must be evidence-based.

31. The educational content developed through an In-Kind Educational Grant must be designed to meet the level of expertise/knowledge of the identified target audience.

32. The educational content developed through an In-Kind Educational Grant must be designed to meet the identified educational needs/practice gaps of the identified target audience.

33. Educational content developed through an In-Kind Educational Grant must be in compliance with the Declarations of Helsinki and Istanbul and with ISHLT's Ethics Statement.

34. Industry employees may not be directly involved with the development of educational content / objectives or in the selection of speakers.

35. Industry employees may present educational content if their unique qualifications for presenting that information have been explained and justified to ISHLT's satisfaction.

36. The content of all presentations, including those by industry, must be non-promotional and free of commercial bias.

37. When educational content regarding therapeutics or devices is presented, a balanced view of the available therapeutics/devices must be provided to the audience. Exceptions may be made in countries where only one device, pharmaceutical, or therapy is available/approved.

### **Commercial Support**

38. For meetings for which commercial support is accepted, all income and expenses of the meeting must be handled exclusively through the host professional society or their official third party meeting organizer and must be made available for ISHLT review and audit.

39. A list of the companies from whom financial or in-kind support will be solicited by the host organization for the meeting or for individual delegates, program committee members, speakers, and chairs must be provided with the Application.

40. No commercial promotional materials may be displayed or distributed in any rooms where educational sessions take place.

41. Representatives of commercial enterprises may attend this educational activity but may not engage in sales activities while in the room where the educational sessions take place.

42. A list of all companies providing financial support must be made available to the meeting attendees.

### **Conflict of Interest**

43. A description of the policies, if any, in place to collect information regarding potential conflicts of interests of speakers, chairs, and program committee members, and the method of mitigating any potential bias or industry influence over content, must accompany the Application.

### **Continuing Education Accreditation**

44. Continuing Education Accreditation of the meeting will not be provided by ISHLT. The host organization is encouraged to seek such accreditation from the appropriate agencies/regulatory bodies. Information regarding any Continuing Education Accreditation available for meeting delegates must be provided to ISHLT.

### **Evaluation and Reporting**

45. A post-meeting evaluation by delegates is required and must be developed with input from the appropriate ISHLT Scientific Council and the ISHLT Education Committee.

46. A post-meeting report to ISHLT is required. This report must include the following, provided within 90 days of the conclusion of the meeting:

- \* list of delegates, including full name, institution, mailing address, email address, professional specialty
- \* post-meeting evaluation results
- \* final list of industry sponsors/supporters including contact information and details of support provided
- \* copies of all print and digital publicity/social media distributed for the meeting
- \* a spreadsheet showing all meeting-related income and in-kind support and all meeting-related expenses.

### **Use of ISHLT Name**

47. Meetings developed via an In-Kind Educational Grant from ISHLT must be labeled “Supported by an In-Kind Educational Grant from ISHLT”. All print and digital conference and publicity materials related to the meeting must include the following statement: “This educational content was provided through an In-Kind Educational Grant from the ISHLT. The views of the organizers and the presenters are not necessarily those of the ISHLT.”

48. ISHLT's name shall not be used in any other capacity in relation to the educational activity or to the host organization. ISHLT's name shall not be used in the title of the activity.

49. All print or digital materials on which the ISHLT name appears must be pre-approved by ISHLT prior to printing/distribution.

50. Only the applicable official ISHLT logo provided by ISHLT may be used on conference materials.

### **Fees**

51. A non-refundable Application Fee of \$200 must accompany all Applications. An additional fee of \$5000 will be assessed for all successful Applications. The Application Fee will be applied toward the final Fee. All or part of this fee may be waived at the discretion of the ISHLT Board of Directors.

52. If it is determined by ISHLT that the educational activity which was based on the In-Kind Educational Grant has generated a profit, 50% of the profit shall be paid to ISHLT, up to a maximum of \$25,000. All or part of this fee may be waived at the discretion of the ISHLT Board of Directors.