

POLICIES GOVERNING JOINT EDUCATIONAL SYMPOSIA AT OTHER ORGANIZATIONS' MEETINGS

Approved December 12, 2016

Modified September 1, 2017

Modified January 13, 2019

A Joint Symposium at another organization's meeting is defined as ***a single session of up to 180 minutes*** whose content is developed by both partnering organizations and which is scheduled to take place as a single session within a larger meeting conducted by the Host organization.

Engagement in Joint Symposia is limited to 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. Joint symposia will not be conducted with individuals or with healthcare providers / organizations / institutions.

There are two categories of organizations with whom ISHLT will conduct Joint Symposia:

- 1) Organizations located outside North America, Western Europe, and Australia/New Zealand
- 2) Organizations located in North America, Western Europe, and Australia/New Zealand

POLICIES FOR CATEGORY 1 ORGANIZATIONS

(Organizations located **outside** North America, Western Europe, and Australia/New Zealand)

Application Process

- 1) An Application to conduct a Joint Symposium at another organization's meeting must be submitted to ISHLT staff by the Education Workforce Leader or an Officer of an ISHLT Scientific Council. The application must have been developed in collaboration with appropriate representatives of the proposed Host organization.
- 2) Prior to submitting the Application, the Council Officer/Education Workforce Leader must review these policies with the authorized staff or volunteer leader of the proposed Host organization and secure the verbal agreement of the Host organization's leader to adhere to them.
- 3) The deadline for submitting Applications is ***at least 4 months prior to the date by which the final content, speakers, and chairs must be approved by the proposed Host organization.***
- 4) ISHLT staff will review the application and make a recommendation to the ISHLT Executive Committee regarding approval.
- 5) Once the application is approved, ISHLT staff will work with the authorized staff or volunteer leader at each partnering organization to develop and sign an MOU outlining the responsibilities and deliverables for each partnering organization. ISHLT's policies regarding Joint Symposia and any such policies of the Host organization must be incorporated into the MOU. ***The MOU must be signed before the selection of symposium program development group representatives, session chairs/moderators, and speakers can begin.***

Program Development Process and Invitations

- 1) Once the MOU is signed, ISHLT staff will contact the Education Workforce Leader or Officer of the Councils to advise them of the decision and to request that they identify the ISHLT representatives to the symposium program development group.
- 2) The Joint Symposium program development group members must consist of an equal representation of members from each partnering organization. **All ISHLT representatives to the symposium program development group must be members of ISHLT and may not be members of the partnering organization.**
- 3) **Each organization will issue the initial invitations to its selected symposium program development group representatives and will explain the compensation, if any, associated with their participation.** Copies will be sent to both organizations' staff.
- 4) Once symposium program development group representatives have been confirmed, all subsequent communications and arrangements with those individuals will be handled by the Host organization. Copies will be sent to both organizations' staff. The Host organization will collect and resolve all conflicts of interest of the symposium program development group representatives.
- 5) The Chairs/Moderators and speakers will be selected by each organization's program development group representatives. The Joint Symposium must consist of 1 Chair/Moderator from each partnering organization and no more than 6 speakers, three from each partnering organization. The ISHLT-appointed Chair/Moderator must also serve as a speaker in order to receive expense reimbursement. **All ISHLT-appointed speakers and chairs/moderators must be members of ISHLT and may not be members of the partnering organization.**
- 6) The final Joint Symposium program, including session title, speaker names, and presentation titles, must be submitted to ISHLT staff for approval by the appropriate Scientific Council leaders.
- 7) **Each organization will issue the initial invitations to its chair/moderator and speakers and will explain the compensation, if any, associated with their participation.** Copies will be sent to both organizations' staff.
- 8) Once chairs/moderators and speakers have been confirmed, all subsequent communications and arrangements with those individuals will be handled by the Host organization. Copies will be sent to both organizations' staff. The Host organization will collect and resolve all conflicts of interest of the chairs/moderators and speakers.
- 9) The title of the Joint Symposium must include the names of both organizations and the words "Joint Symposium" as follows: "XXX/ISHLT Joint Symposium: Symposium Title". ISHLT's name may not be used in any other capacity.
- 10) Final decisions regarding acceptance and scheduling of Joint Symposium Proposals will be made by the Host organization's Scientific Program Committee or other appropriate body.

Finances/Other

- 1) ISHLT will reimburse its appointed speakers and chair in accordance with its policy. All other expenses associated with the Joint Symposium will be borne by the Host organization.

- 2) The Host organization will provide complimentary registration to the ISHLT-appointed chair/moderator and speakers.
- 3) No commercial support may be sought or provided by either organization for the Joint Symposium, nor for any individual speakers / chairs / attendees / planners of the Joint Symposium, without prior written agreement between all partnering organizations' leadership and/or senior staff. Such agreement may entail the sharing of such support between the partnering organizations.
- 4) Joint Symposia may not take place on a day that requires a separate registration fee, and no additional registration fees may be assessed for Joint Symposia or for subsequent online access to the Joint Symposia, unless sold as part of online access to the entire meeting.
- 5) All partnering organizations agree to actively promote the Joint Symposium to their members.
- 6) Joint Symposia must meet ISHLT standards for medical education quality in terms of planning, content, and conflict of interest.

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POLICIES FOR CATEGORY 2 ORGANIZATIONS

(Organizations located in North America, Western Europe, and Australia/New Zealand)

Application Process

- 1) An Application to conduct a Joint Symposium at another organization's meeting may be submitted to ISHLT staff by any ISHLT member or authorized staff or volunteer leader of the proposed Host organization. It is strongly recommended that the application be developed in collaboration with Education Workforce Leader or an Officer of one of the ISHLT Scientific Councils.
- 2) The deadline for submitting Applications is ***at least 2 months prior to the date by which the final content, speakers, and chairs must be approved by the proposed Host organization. Exceptions to this policy may be made in some cases at the discretion of ISHLT staff.***
- 3) Prior to submitting the Application, the submitter must review these policies with the authorized staff or volunteer leader of the proposed Host organization and secure the verbal agreement of the Host organization's leader to adhere to them.
- 4) ISHLT staff will review the application and make a recommendation to the ISHLT Executive Committee regarding approval.
- 5) ISHLT staff will work with the authorized staff or volunteer leader at each partnering organization to develop and sign an MOU outlining the responsibilities and deliverables for each partnering organization. ISHLT's policies regarding Joint Symposia and any such policies of the Host organization must be incorporated into the MOU. ***The MOU must be signed before the selection of symposium program development group representatives, session chairs/moderators, and speakers can begin.***

Program Development Process and Invitations

- 11) Once the MOU is signed, ISHLT staff will contact the Education Workforce Leader of the appropriate ISHLT Scientific Council and request that they identify the ISHLT representatives to the symposium program development group.
- 12) The Joint Symposium program development group members must consist of an equal representation of members from each partnering organization. **All ISHLT representatives to the symposium program development group must be members of ISHLT and may not be members of the partnering organization.**
- 13) **Each organization will issue the initial invitations to its selected symposium program development group representatives and will explain the compensation, if any, associated with their participation.** Copies will be sent to both organizations' staff.
- 14) Once symposium program development group representatives have been confirmed, all subsequent communications and arrangements with those individuals will be handled by the Host organization. Copies will be sent to both organizations' staff. The Host organization will collect and resolve all conflicts of interest of the symposium program development group representatives.
- 15) The Joint Symposium session chairs/moderators and speakers must be appointed in equal numbers by each organization's program development group representatives. **All ISHLT-appointed speakers and chairs/moderators must be members of ISHLT and may not be members of the partnering organization.**
- 16) The final joint symposium program, including session title, speaker names, and presentation titles, must be submitted to ISHLT staff for approval by the appropriate Scientific Council.
- 17) **Each organization will issue the initial invitations to its chair/moderator, and speakers and will explain the compensation, if any, associated with their participation.** Copies will be sent to both organizations' staff.
- 18) Once chairs/moderators and speakers have been confirmed, all subsequent communications and arrangements with those individuals will be handled by the Host organization. Copies will be sent to both organizations' staff. The Host organization will collect and resolve all conflicts of interest of the chairs/moderators and speakers.
- 19) The title of the Joint Symposium must include the names of both organizations and the words "Joint Symposium" as follows: "XXX/ISHLT Joint Symposium: Symposium Title". ISHLT's name may not be used in any other capacity.
- 20) Final decisions regarding acceptance and scheduling of Joint Symposium Proposals will be made by the Host organization's Scientific Program Committee or other appropriate body.

Finances/Other

- 21) The Host organization will provide complimentary registration to the ISHLT-appointed chair/moderator and speakers.

- 22) All expenses associated with the Joint Symposium will be borne by the Host organization, including the compensation and/or reimbursement, if any, provided to the program development group representatives, speakers, and Chair/Moderator selected by ISHLT.
- 23) No commercial support may be sought or provided by either organization for the Joint Symposium, nor for any individual speakers / chairs / attendees / planners of the Joint Symposium, without prior written agreement between all partnering organizations' leadership and/or senior staff. Such agreement may entail the sharing of such support between the partnering organizations.
- 24) Joint Symposia may not take place on a day that requires a separate registration fee, and no additional registration fees may be assessed for Joint Symposia or for subsequent online access to the Joint Symposia, unless sold as part of online access to the entire meeting.
- 25) All partnering organizations agree to actively promote the Joint Symposium to their members.
- 26) Joint Symposia must meet ISHLT standards for medical education quality in terms of planning, content, and conflict of interest.