Educational Symposia & Affiliate Marketing Activities Guidelines

NATCO 38th Annual Meeting
August 10-13, 2013
Manchester Grand Hyatt – San Diego, CA
NATCO offers three unique opportunities for interacting and providing educational opportunities to over 400 transplant professionals during NATCO’s 38th Annual Meeting.

1. **CE Symposium**

Your organization can sponsor and provide an Educational Session with invited speakers on specific topics of current issues to educate the NATCO Annual Meeting attendees on transplant/procurement practice. You may submit a CE symposium request based on the guidelines on the following pages.

2. **Non-CE Symposium**

Your organization can sponsor and provide a non-CE product theater with invited speakers on specific topics of current issues to provide information to the NATCO Annual Meeting attendees on transplant/procurement practice or new products. You may submit a non-CE symposium request based on the guidelines on the following pages.

3. **Affiliate Marketing Activities**

If your organization would like to host a committee or company meeting, workshop, user group, reception, hospitality suite or other promotional activity either at the conference hotel or at a facility off-site, please complete the attached form included and return to the NATCO Executive Office. Upon receipt of this form, NATCO will review your request, and upon approval, help to determine the location of meeting space at the conference hotel (based on availability at time of request). If you decide to have this event off-site, it is your responsibility to secure space.

**Instructions**

Once your organization has determined which opportunity best fits your intended needs, please review the additional information regarding each of these opportunities and submit the proper information and completed form to the NATCO Executive Office for review and consideration. Please note that additional meeting space is limited at the host hotel, and approval will be provided based on availability and consideration on a first-come, first-serve basis.

Please contact a member of the NATCO staff with specific questions/concerns.

Questions:

- **Educational Sessions regarding CE and non-CE Satellite Symposia**
  Christie Ross, CAE, Education Director  
  cross@goAMP.com  
  (913) 895-4776

- **Logistical Hotel/Space Questions**
  Tonja Britt, Meeting Planner  
  tonja.britt@goAMP.com  
  (913) 895-4881
CE & Non-CE
Symposium Guidelines

1. The Sponsor will provide the proposed CE or non-CE symposium information to the
NATCO Executive Office no later than June 14, 2013 for consideration. This
information will include (see pages 8-10 for more details):
   a. Brief session description
   b. Tentative speaker(s) list

   For CE symposia only:
   c. Learning objectives
   d. Completed Vested Interest/Biographic Data Form for each proposed speaker
   e. Completed Educational Activity Overview Form

2. The NATCO Annual Meeting Program Chairs will review the program and have the
authority to approve/disapprove the date/time or content of the symposium to ensure
it does not conflict with any existing NATCO-planned events.

3. The Sponsor is responsible for payment of honoraria and expenses directly to the
speaker(s).

4. The Sponsor is responsible for all marketing costs and stand-alone brochures
advertising the symposium.

5. The Sponsor will collect presentations from speakers, from which they will print,
collate, ship and distribute the symposium handouts.

6. For CE-symposia: The Sponsor will provide all necessary information by the
deadlines established by NATCO for the contact hour application by June 14, 2013.
If the information is not received by June 14, the Sponsor will be responsible for
submitting its own continuing education application.

7. NATCO will advertise the symposium in its Annual Meeting registration brochure (if
deadline is adhered to), on the association’s official website, www.natco1.org, and in
the official program materials.

8. NATCO will assign appropriate meeting space for the symposium.

9. NATCO is responsible for all on-site logistical aspects of the event, unless sponsor
selects option 16.B. below. This includes coordinating all activities, including
ordering food and beverage and audio visual equipment, unless specific alternate
arrangements have been made between the parties.

10. NATCO will handle all registrations for the symposium and provide a complete list of
participants to sponsor prior to and after the event, unless sponsor selects option
15.B. below. Please note that, unless other arrangements are made and special
permission granted, all conference attendees are eligible to attend this event.

11. NATCO staff will provide a one-time use of the electronic membership mailing list to
the sponsor for advertising its satellite symposium.

12. NATCO will pre-approve all advertising for the symposium and provide such
approval in writing to the sponsor.
Symposia Guidelines

13. *For CE-symposia:* NATCO will provide contact hours for the satellite symposium, unless specific alternate arrangements have been made between the parties, unless Sponsor selects option 16.B. below, or the sponsor fails to submit the continuing education information by June 14, 2013.

14. NATCO will provide the sponsor with participant evaluations for the symposium.

15. Standard AV includes: Screen, LCD projector, laptop, standard speaker set and a podium or lavaliere microphone for each speaker. ANY additional AV requirements will be provided by NATCO’s AV vendor at the expense of the symposium sponsor.

16. There are two administrative fee options associated with satellite symposia.

**Option A.** Each fee is inclusive of food and beverage costs, meeting space and audiovisual equipment as designated in #15 which the NATCO Executive Office staff will coordinate unless specific alternate arrangements have been made between the parties. The fee also includes continuing education application fees, if applicable. The breakdown is as follows:

- Breakfast -- $20,000
- Lunch -- $35,000
- Dinner -- $55,000

*Enduring Material* is an additional $10,000 charge.

*Enduring Materials:* If you wish NATCO, as part of the symposium, to provide enduring material for your event, there is an additional fee of $10,000. This would include printing and/or posting handout materials on NATCO’s web site and taping the presentation for future webinar/online education.

**Option B.** NATCO will release the hotel space to the sponsor. The sponsor is responsible for all arrangements and payments regarding AV, food and beverage and for continuing education requirements (if applicable), including submission of CE application and certificates of attendance for its symposium. The breakdown is as follows:

- Educational Session classroom setting -- $10,000

**Information sponsor must include in the symposia proposal:**

1. *For CE symposia:* Educational Activity Overview Form to include objectives and an outline of the symposium (copy attached).

2. *For CE symposia:* Proposed speakers and a Biographical Data/Vested Interest Form for each speaker (copy attached).

3. A 250 to 500-word abstract of the session that, when approved, can be used in the registration brochure and final program.

4. Name and contact information of the communications company handling the symposium and contact information of the sponsor staff member who is responsible for symposium details.
Symposia Guidelines

Advertising Regulations

1. All advertising for the symposium must be approved by NATCO in writing prior to printing.

2. In accordance with NATCO policy, all advertising must bear reference to the sponsor either as an educational grant or funding provided by…

3. NATCO does not endorse satellite symposia and therefore no indication should be made in the advertising that NATCO endorses the symposium.

4. An accreditation statement must be included in all advertising, if applicable. The following statement must appear in advertising if NATCO is applying for continuing education credits:

   NATCO applies for continuing education credits for transplant coordinators through the American Board for Transplant Certification and for nurses through the American Nurses Credentialing Center’s Commission on Accreditation.

   This activity is pending final approval for x.x contact hours (NATCO will provide the number of contact hours) by an accredited provider of Continuing Education in Nursing by the American Nurses Credentialing Center’s Commission on Accreditation.

Questions regarding satellite symposia or any portions of this document should be directed to Christie Ross, CAE, Education Director, at cross@goAMP.com or (913) 895-4776.
MARKETING
Affiliate Marketing Activity Guidelines

If your organization would like to host a committee or company meeting, workshop, user or focus group, reception, hospitality suite or other promotional activity either at the conference hotel or at a facility off-site, please complete the attached form, and return it to the NATCO Executive Office. Upon receipt of this form, NATCO will review your request, and upon approval, help to determine the location of meeting space (based on availability at time of request).

1. No unofficial activity can be held at a date or time that directly conflicts with the official schedule of the NATCO Annual Meeting.

2. The Manchester Grand Hyatt will not release any meeting room assignments without approval from the NATCO Executive Office. Once your request is approved by our office, we will request meeting space for your event. No meeting space is guaranteed, and space is based on availability at time of approval of the request. NATCO does not hold meeting space for unofficial activities.

3. NATCO will not provide shuttles for unofficial activities held away from the conference hotel.

4. All arrangements for hotel meeting room rental fees, room set-up, food and beverage, audio-visual equipment and master account billing are the responsibility of the sponsoring organization, once approved.

5. These events are labeled as an “unofficial activity” to indicate that they are not planned or sponsored by NATCO; therefore, there can be no implication in any promotional materials, on-site materials or products that they are connected with the NATCO Annual Meeting or endorsed by NATCO.

6. Upon approval, the administrative fee to hold an unofficial activity at the conference hotel in conjunction with the NATCO Annual Meeting is payable to NATCO as follows:

<table>
<thead>
<tr>
<th>Size of Room</th>
<th>Cost per event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 500 square feet or in a Suite</td>
<td>$750</td>
</tr>
<tr>
<td>501 to 1,000 square feet</td>
<td>$1,050</td>
</tr>
<tr>
<td>1,001 to 1,500 square feet</td>
<td>$1,200</td>
</tr>
</tbody>
</table>

7. Upon approval, the administrative fee to hold an unofficial activity at a facility off-site in conjunction with the Annual Meeting is payable to NATCO as follows:

<table>
<thead>
<tr>
<th>Number of people expected to attend</th>
<th>Cost per event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 100</td>
<td>$1,050</td>
</tr>
<tr>
<td>100-500</td>
<td>$1,200</td>
</tr>
<tr>
<td>500-1,000</td>
<td>$1,500</td>
</tr>
</tbody>
</table>
Non-exhibiting/sponsoring companies $2,000
Affiliate Marketing Activity Guidelines

Advertising Regulations

1. You may promote your activity through your own marketing methods or see below for other suggestions. Signage to promote your activity can be placed near the registration area at the conference hotel, but must be approved by NATCO as to content and placement.

2. Mailing Labels – We offer a 60% discount on our attendee labels to those companies who are a sponsor or exhibitor at the annual meeting. The normal fee is $300, but your discounted fee is $125. You can order these by calling the NATCO Executive Office at (913) 895-4612 by July 10 and it will be emailed to you on July 18.

3. Advertising - NATCO offers advertising in the final program. Camera-ready artwork must be received by June 25. The rates are as follows:
   - ¼ page black & white ad - $300
   - ½ page black & white ad - $500
   - Full page black & white ad - $1,000
   - Inside or outside back cover or front inside cover - $1,500
Symposium & Affiliate Activities Form

To ensure your understanding of the guidelines related to holding an Educational Symposia or Affiliate Marketing Activity, please fill in the information and sign below.

Submission for:  □ CE Symposium □ Non-CE Symposium
□ Option A  □ Option B
□ Affiliate Marketing Activity

Name of Organization/Company:

Contact Name:

Phone:           Email:

Our organization requests to hold the following activity at the NATCO Annual Meeting:

**CE or Non-CE Symposium:**
□ Session with Meal  □ Session in Classroom Setting

**Affiliate Marketing Activity:**
□ User Group/Advisory Board  □ Company/Committee Meeting
□ Hospitality Suite  □ Other:

Purpose:

Preferred Date:         Preferred Time:

Size of Meeting Space Requested:

Anticipated Number of Attendees:

Room Set-Up (Classroom, Rounds, Conference, Reception, etc.):

Our organization/company agrees not to schedule or conduct any outside activity, including, but not limited to, receptions, seminars, symposia, workshops, user groups, hospitality suites or other activity that are in conflict with the official NATCO Annual Meeting program, whether such activities are held at or away from the conference hotel, except with written approval of conference management. Our organization/company will submit to conference management any program we intend to hold for written approval as to time and place, via this form. Upon approval of event(s), we further agree to pay, in full, the administrative fee as listed above.

________________________________________
Signature of Authorized Contact Listed Above   Date

NATCO looks forward to working with you as plans are made for your event. Let us know at any time if we can be of assistance. We realize that your decision to conduct an unofficial activity represents a large investment of time and money and is a benefit to the NATCO Annual Meeting attendees.

*Return this form to NATCO Executive Office by June 14*

natco-info@goAMP.com, FAX (913) 895-4652.

Effective March 2013. Subject to change without notice.
CE SYMPOSIUM FORMS
NATCO
38th Annual Meeting
August 10-13, 2013 – San Diego, CA

Presenter/Planner Biosketch/Conflict of Interest Form

Title of Educational Activity: ______ Education Activity Date: ______

Role in Educational Activity: (Check all that apply)
☐ Nurse Planner ☐ Planning Committee Member ☐ Faculty/Presenter/Author
☐ Content Reviewer ☐ Other – Describe: ______

Section 1: Demographic Data

Name, Degrees & Credentials: ______

If RN, nursing degree(s): ______ AD ______ Diploma ______ BSN ______ Master ______ Doctorate

Home Address or Business Address: ______

Day Telephone (best contact information): ______ Email Address: ______

Current Employer and Position/Title: ______

Section 2: Expertise – Planning Committee (If the description of expertise does not provide adequate information in Sections 2 & 3, the Nurse Planner may request additional documentation.)

As the Nurse Planner (responsible for ensuring adherence to ANCC Accreditation criteria), describe your knowledge & expertise re: the CNE rules & criteria: ______

As the Content Expert, describe your expertise & years of training specific to your role in planning the educational activity listed above: ______

As Other on the planning committee, describe your expertise & years of training specific to your role in planning the educational activity listed above: ______

Section 3: Expertise – Presenter/Faculty/Author/Content Reviewer

☐ An "X" on this line identifies the expertise information is the same as listed above if you are BOTH a planner and a presenter/faculty/author/content reviewer.

Describe expertise & years of training specific to the educational activity listed above: ______

Section 4: Conflict of Interest

The potential for conflicts of interest exists when an individual has the ability to control or influence the content of an educational activity and has a financial relationship with a commercial interest,* the products or services of which are pertinent to the content of the educational activity. The Nurse Planner is responsible for evaluating the presence or absence of conflicts of interest & resolving any identified actual or potential conflicts of interest during the planning & implementation phases of an educational activity. If the Nurse Planner has an actual or potential conflict of interest, he or she should recuse himself or herself from the role as Nurse Planner for the educational activity.

*Commercial Interest. See Addendum at the end of this form for a definition of commercial interest.

All individuals who have the ability to control or influence the content of an educational activity must disclose all relevant relationships** with any commercial interest, including but not limited to members of the Planning Committee, speakers, presenters, authors, &/or content reviewers. Relevant relationships must be disclosed to the learners during the time when the relationship is in effect & for 12 months afterward. All information disclosed must be shared with the participants/learners prior to the start of the educational activity.

**Relevant relationships, as defined by ANCC, are relationships with a commercial interest if the products or services of the commercial interest are related to the content of the educational activity.

Effective March 2013. Subject to change without notice.
• Relationships with any commercial interest of the individual’s spouse/partner may be relevant relationships & must be reported, evaluated, & resolved.
• Evidence of a relevant relationship with a commercial interest may include but is not limited to receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (stock & stock options, excluding diversified mutual funds), grants, contracts, or other financial benefit directly or indirectly from the commercial interest.
• Financial benefits may be associated with employment, management positions, independent contractor relationships, other contractual relationships, consulting, speaking, teaching, membership on an advisory committee or review panel, board membership, & other activities from which remuneration is received or expected from the commercial interest.

Is there an actual, potential or perceived conflict of interest for yourself or spouse/partner? _____ Yes _____ No

If yes, please complete the table below for all actual, potential or perceived conflicts of interest**:

<table>
<thead>
<tr>
<th>Check all that apply</th>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Royalty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stock</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speakers Bureau</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consultant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

** All conflicts of interest, including potential ones, must be resolved prior to the planning, implementation, or evaluation of the continuing nursing education activity.

Section 5: Statement of Understanding
An “X” in the box below serves as the electronic signature of the individual completing this Biographical/ Conflict of Interest Form & attests to the accuracy of the information given above.

_____ Electronic Signature (Required)    Date _____

Completed By: Name and Credentials of person completing form

Section 6: Conflict Resolution (to be completed by Nurse Planner)
A. Procedures used to resolve conflict of interest or potential bias if applicable for this activity:

_____ Not applicable since no conflict of interest.
_____ Removed individual, with conflict of interest, from participating in all parts of the educational activity.
_____ Revised the role of the individual with conflict of interest so that the relationship is no longer relevant to the educational activity.
_____ Not awarding contact hours for a portion or all of the educational activity.
_____ Undertaking review of the educational activity by a content reviewer to evaluate for potential bias, balance in presentation, evidence-based content or other indicators of integrity, & absence of bias, AND monitoring the educational activity to evaluate for commercial bias in the presentation.
_____ Undertaking review of the educational activity by a content reviewer to evaluate for potential bias, balance in presentation, evidence-based content or other indicators of integrity, & absence of bias, AND reviewing participant feedback to evaluate for commercial bias in the activity.
_____ Other - Describe: _____

B. Nurse Planner Signature *(If form is for the activity Nurse Planner, an individual other than the Nurse Planner must review and sign).

An “X” below serves as the electronic signature of the Nurse Planner reviewing the content of this Biographical/Conflict of Interest Form

_____ Electronic Signature (Required)

Completed By: Name and Credentials    Date
Addendum:

*Commercial interest*, as defined by ANCC, is any entity producing, marketing, reselling, or distributing healthcare goods or services consumed by or used on patients, or an entity that is owned or controlled by an entity that produces, markets, resells, or distributes healthcare goods or services consumed by or used on patients. Commercial Interest Organizations are ineligible for accreditation.

An organization is NOT a Commercial Interest Organization* if it is:

- A government entity;
- A non-profit (503(c)) organization;
- A provider of clinical services directly to patients, including but not limited to hospitals, health care agencies and independent health care practitioners;
- An entity the sole purpose of which is to improve or support the delivery of health care to patients, including but not limited to providers or developers of electronic health information systems, database systems, and quality improvement systems;
- A non-healthcare related entity whose primary mission is not producing, marketing or selling or distributing healthcare goods or services consumed by or used on patients.
- Liability insurance providers
- Health insurance providers
- Group medical practices
- Acute care hospitals (for profit and not for profit)
- Rehabilitation centers (for profit and not for profit)
- Nursing homes (for profit and not for profit)
- Blood banks
- Diagnostic laboratories

(*Reference: Accreditation Council for Continuing Medical Education (ACCME) Standards of Commercial Support, August 2007 (www.accme.org) - ANCC’s definition is intended to ensure compliance with Food and Drug Administration Guidance on Industry-Supported Scientific and Educational Activities and consistency with the ACCME definition)

Return no later than June 14, 2013
NATCO Executive Office – (913) 895-4652 or natco-info@goAMP.com
EDUCATIONAL ACTIVITY OVERVIEW
Return no later than June 14, 2013
NATCO Executive Office – (913) 895-4652 or natco-info@goamp.com

Presenter: ____________________________

Session Title: ____________________________ Date/Time: ____________________________

<table>
<thead>
<tr>
<th>OBJECTIVES</th>
<th>CONTENT (Topics)</th>
<th>TIME FRAME</th>
<th>PRESENTER</th>
<th>TEACHING METHODS</th>
</tr>
</thead>
<tbody>
<tr>
<td>At the end of this session the participant will be able to:</td>
<td>Provide an outline of the content for each objective. It must be more than a re-statement of the objective.</td>
<td>State the time frame for each objective.</td>
<td>List the faculty for each objective.</td>
<td>Describe the teaching methods, strategies, materials, and resources for each objective.</td>
</tr>
<tr>
<td>Presentation outline that correlates with objectives.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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