American Association of Clinical Endocrinologists
2017 Annual Meeting Satellite Symposia Guidelines

Satellite Symposia are a valued educational component of the AACE Annual Meeting. AACE offers several opportunities to hold these dynamic sessions supported by educational grants and accredited for CME credit by AACE. Medical education/meeting management organizations are invited to submit proposals to conduct AACE Annual Meeting Satellite Symposia on topics concerning endocrine disorders and related medical conditions.

The AACE Annual Meeting Satellite Symposia Guidelines are designed to provide comprehensive information to organizations that wish to hold a satellite symposium at the AACE Annual Meeting. Read these guidelines thoroughly prior to initiating any grant requests for a satellite symposium. Should there be any questions or additional information needed, please do not hesitate to contact AACE for assistance.

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<thead>
<tr>
<th>LIVE ACTIVITY</th>
<th>Phone: 904-404-4152</th>
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</thead>
<tbody>
<tr>
<td>LouAnn Griebel</td>
<td>Email: <a href="mailto:satellites@aace.com">satellites@aace.com</a></td>
</tr>
<tr>
<td>Exhibit &amp; Corporate Support Manager</td>
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<tr>
<th>ENDURING ACTIVITY</th>
<th>Phone: 904-404-4171</th>
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<tbody>
<tr>
<td>Emily Hines</td>
<td>Email: <a href="mailto:cme@aace.com">cme@aace.com</a></td>
</tr>
<tr>
<td>Learning Technology &amp; Online Education Manager</td>
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Contents:

- Summary of Roles & Responsibilities ........................................... Page 2
- Program Process & Requirements .................................................... Page 3-5
- Financial Policies & Milestones .................................................... Page 6
- Logistical Information ................................................................. Page 6-7
- Budget Information ..................................................................... Page 8-9
- Enduring Material Process & Information ....................................... Page 10-11
- AACE 2017 Enduring Material Fee Schedule ..................................... Page 12
- AACE 2017 Satellite Symposium Request Form .................................. Page 13
**ROLES & RESPONSIBILITIES**

**Management Company**

- Submit AACE Annual Meeting Satellite Symposium Request Form *(prior to seeking funding)*
- Upon authorization from AACE on request form:
  - provide copies of request documentation (online forms, uploaded attachments, etc.) to AACE for review/approval
  - submit grant request(s) to secure funding for satellite symposium*

  *If the commercial interest requires the accrediting provider to submit on behalf of the management company, the management company will provide AACE with all information to input/upload and submit grant request.*
- Upon grant award:
  - submit Letter of Agreement for AACE signature from confirmed commercial supporter
  - complete and submit Satellite Symposium Notification Form
- Work with AACE to suggest and approve all faculty
- Provide AACE with required CME information for AACE to accredit symposium:
  - fully executed Letter of Agreement
  - speaker packets/faculty forms
  - program information
- Develop and produce all required print materials for program, including:
  - brochure/mail piece
  - signs
  - syllabus and evaluation
  - any optional advertising, including digital materials
  
  *All print materials are subject to AACE/CME approval.*
- Manage on-site logistics, including, but not limited to:
  - coordination of mandatory food functions
  - working with AACE-approved vendors to purchase optional AV and recording enhancements (no outside AV equipment permitted, INCLUDING ARS, without prior approval from AACE)
  - shipping/receiving of program materials
  - faculty travel and accommodations
  - slide review
  - distribution and collection of attendee materials, i.e., syllabus, evaluations
- Provide AACE with a summary report of attendee evaluations and outcomes reporting for the symposium
- Reconcile all program expenses based on original budget
  - provide AACE with copies of reconciliation submission, i.e., online print outs and/or screenshots

**AACE**

- Provide CME accreditation for the program, serving as sole ACCME-accredited provider
- Provide necessary information for the management company to develop program proposal and budget
- Assist management company with grant request process, either by:
  - authorizing company to submit grant request or
  - submitting request directly with information provided by management company
- Review, approve speakers and faculty Chair
- Manage educational grant from commercial supporter and distribute funds to management company per established budget upon achievement of milestones (see page 6, Financial Policies & Milestones)
• Review and approve all print and digital materials, both required and optional pieces, e.g., brochures and advertisements, signage, and syllabus

• Provide the AACE membership list OR the AACE 2017 Annual Meeting pre-registration list to management companies for one-time use on an approved mail piece (domestic required, international optional)

• Register all attendees both in advance and on-site (symposia registration is included as part of the overall Annual Meeting registration)

• Provide CME certificates to attendees. Attendees can claim credit onsite or online after the meeting and receive one certificate with all claimed sessions.

• Provide adequate meeting space for symposium and pre-program food function with standard room set-up (solely determined by AACE)

• Provide a standard AV set-up via official Annual Meeting vendor to include: standard black pipe & drape stage backdrop, LCD projection (front/rear and number of screens subject to space availability), microphones (podium, lavaliere, head table and audience), laser pointer, stage lighting and sound system.

• Retain the rights to written, audio, and/or visual recording of the program

• Act as liaison between management company and hotel and/or convention center contacts, AV, and all other vendor contacts

• Provide (1) AACE staff for lead retrieval scanning

• Send One (1) email marketing satellites to attendees

• Optional: Reference each symposium in AACE publications and marketing:
  ❖ The First Messenger newsletter
  ❖ AACE Online News
  ❖ Annual Meeting-specific pieces (Annual Meeting website, on-site program)

PROGRAM PROCESS & REQUIREMENTS

Satellite Symposium Request

Management companies must first complete and submit the Satellite Symposium Request Form to AACE before any grant requests are completed. One request form is required per activity and commercial entity.

Examples:
If the same proposal will be submitted to three different commercial interests for funding, then three forms are required.
If three different proposals are going to one commercial interest, then three forms are required.

The request form does not reserve a time slot on the program. Time slots are filled on a first come, first served basis upon grant and notification form approval.

Grant Request Authorization

Based on the completed Satellite Symposium Request Form, AACE will advise the management company of the following grant request submission process:

1. Forwarding of full proposal and budget for review and approval by AACE [allow 5 business days for review]

2. Upon approval of proposal AACE will advise of either of the following:
   ● Authorize the management company to proceed with uploading directly to the commercial interests’ portal.
   AACE will then require:
   ● Copies of all grant documentation/information, i.e., uploaded attachments, online forms, etc.
   ● Grant ID number per grant submission

 OR

● Require all grant information from the management company in order for AACE to submit/upload the grant on behalf of the management company due to the commercial interests’ grant submission requirements”

“If AACE is required to submit the grant request, the management company must provide AACE with screenshots of each portal web page showing grant information exactly as it is to be entered/uploaded. Once all necessary information is received from the management company, allow 5-7 business days for AACE staff to submit the grant request. Every effort will be made to submit grants promptly; however, a faster turnaround cannot be guaranteed.

NOTE: All grant requests must acknowledge AACE as the sole accredited provider for the symposium and payee for the grant. AACE will not accept grants, Letters of Agreement, and/or Satellite Symposium Notification Forms with alternate provider and payee information.
Satellite Symposium Notification Form
When grant approval is received from the commercial supporter, management companies may submit to AACE their completed Satellite Symposium Notification Form with the required attachments listed on the form, including the fully executed grant Letter of Agreement (LOA). **NOTE:** In the case of electronic acceptance agreements, the LOA must be first submitted to AACE for online acceptance authorization.

AACE staff will advise if any attachments are missing or incomplete. The management company will also be advised if any of the proposed faculty is confirmed to speak at other sessions at the Annual Meeting. AACE limits the number of appearances each speaker can make within the entire Annual Meeting Program.

Completed forms will be reviewed by the AACE Program Committee for final approval.

AACE Program Committee Approval Notice & Faculty Confirmations
Management companies will be notified of symposium approval and receive their assigned time slot as well as meeting room location. AACE will also advise on faculty selected by the Program Committee. All management companies of accepted symposia will receive the following information needed to execute their program:

- AACE Satellite Symposium Checklist
- AACE Satellite Symposium Materials Content Checklist
- AACE logos
- Lead Retrieval Order Form
- 2017 Freeman AV Form
- 2017 Tri-Star Marketing rate card

Management companies should immediately contact the approved faculty, including the Chair, to confirm their participation. If faculty members are unavailable or decline the invitation, AACE must be contacted with replacement recommendations for Program Committee approval. **NOTE:** Once a symposium Chair is confirmed, s/he should be involved in identifying any necessary replacement faculty recommendations.

**Faculty Requirements:** AACE requires that all approved faculty (inclusive of Chair) complete the online faculty packet (AACE will provide link with approval notice.)

**CME Submission Requirements:** AACE requires that all activities be submitted for accreditation no later than three (3) months prior to the start of the activity. Required documents:

1. Completed Satellite Symposium Notification Form and appropriate supporting documents (listed in form)
2. Completed faculty packets

Upon receipt of all required documents, AACE will submit each satellite symposium for CME accreditation and advise management companies once approved.

Print Materials & Advertising
AACE must approve all program materials (print, digital, and other media) prior to production and distribution. This includes both required and optional materials and advertising. Management companies will be provided with the AACE Satellite Symposium Materials Content Checklist for content requirements of all program materials upon initial satellite symposium approval.

Mailers
Management companies are required to produce and send at least one (1) printed mail piece that promotes their satellite symposium. This mail piece will be sent to the list of their choice, either:

- All AACE membership or
- Annual Meeting pre-registration list

**Each list is for one-time use only.** Proofs of required mailer must be submitted to AACE for approval as well as documentation of approval by the faculty Chair.  **Allow 5-7 business days for review and response.**
Signage
Management companies are required to produce at least one (1) sign for on-site use and the artwork for the Satellite Display board that AACE produces:

1. One sign to be displayed by the door/entryway of the symposium meeting room (not to exceed 28”x44”)

2. Provide artwork for one panel on the Satellite Display Board to be produced by AACE. The panel measures 38.125” x 87” within the display – 8” on the bottom will be covered by the base of the meter board and 1” will be covered on all sides by metal side panels. Artwork/Logo specifications: Acceptable formats are: EPS, JPEG, TIFF, or Hi-Res PDF (300 dpi); all fonts must be converted to outlines. Artwork should be submitted by the stated deadline in the satellite symposium checklist.

Optional - Up to three (3) additional signs may be produced by Management Company and placed in designated areas set by AACE. These signs cannot exceed 28”x44”. Easels will be provided by AACE. Management companies may not post any additional or directional signs for their program and unauthorized signs will be subject to immediate removal by AACE. Sign proofs must be submitted to AACE for approval. **Allow 57 business days for review and response.**

Optional Marketing
Additional advertising opportunities are available for satellite symposia, including ads in association publications and Annual Meeting specific print materials. While optional, these items must still be approved by AACE prior to publication.

Syllabus with Evaluation
Management companies are required to produce a syllabus for their satellite symposium to be distributed to on-site attendees. Syllabus content requirements are listed in the AACE Satellite Symposium Materials Content Checklist. Specific CME content components, such as disclosure information, will be provided by AACE upon CME approval of the satellite symposium.

Syllabus proofs with activity evaluation form must be submitted to AACE for approval. **Allow at least 5-7 business days for review and response.** Faculty Chair approval of syllabus and evaluation form must accompany submitted proofs.

Introduction Slides
AACE will generate a standard set of introduction slides (5-6 slides) for each satellite symposium to include disclosure information, support acknowledgement, how to claim CME and other housekeeping announcements. Management companies will be given copies of these slides; however, AACE will provide them directly to the AV vendor on-site, and they will run from the time the doors open until the start of the program agenda.

Post-program Documentation & Budget Reconciliation
AACE requires management companies to provide a summary report of the attendee evaluations and any other outcomes reporting resulting from their satellite symposium. Reports should be submitted by the stated deadline in the satellite symposium checklist. If longer range outcomes measurements are being conducted, the management company must advise AACE as to timeline and reports should be submitted upon completion.

Management companies must reconcile all program expenses based on the original satellite symposium budget and provide a copy of their reconciled budget to AACE for review prior to submission. Receipts may be requested. As with the original grant request, if the management company was authorized to submit the grant directly, then they will also be required to submit the necessary grant reconciliation directly to the supporter and provide copies of their submission to AACE, i.e. online forms/screen shots, uploaded documents, etc. If it was necessary for AACE to submit the grant request, then the management company will follow the same protocol for the reconciliation, providing AACE staff with the information exactly as it is to be entered and uploaded. **Minimum of 5-7 business days should be allotted for AACE staff to complete the submission.**
FINANCIAL POLICIES & MILESTONES

In accordance with ACCME Standards for Commercial Support, it is AACE’s policy that all funds and support associated with a CME activity, whether in the form of an educational grant or not, must be given to the accredited provider (AACE). Live activity funds will be distributed to the management company upon achievement of the two required milestones listed below. Regardless of milestone achievement, payments to the management company can never exceed balance of funds received by AACE from commercial supporter.

Required Milestones for Grant Funds Disbursement – Live Activity

1. Submission of: (Target Audience, Needs Assessment, Educational Objectives and Program Agenda.)
   a. 90% of live activity grant, less $60,000 AACE fee.

   Example: $200,000 = Grant Award
             $200,000 x 0.90 = $180,000
             $180,000 – $60,000 = $120,000

   1st Payment = $120,000

   b. Funds will be distributed upon receipt from commercial supporter. If less than 100% received from commercial supporter at time of milestone achievement, the remaining balance will be paid immediately upon AACE’s receipt of funds. Additionally, the first payment will need to be recalculated.

2. Submission of post-program documentation and budget reconciliation
   a. Up to 10% of live activity grant, less any expenses incurred by AACE; exact amount based on final budget reconciliation
   b. AACE will retain any unused grant funds for return to commercial supporter.

If the payment schedule outlined by the commercial supporter in the LOA does not withhold a percentage of grant funds for payment upon reconciliation, AACE will retain 10% of total funds received for the live activity to be distributed to the management company upon completion of post-program requirements (Milestone 2).

LOGISTICAL INFORMATION

Program Format

The basic program format for AACE satellite symposia is three (3) presenting speakers plus one faculty Chair to moderate the live program for a total of four (4) faculty members. The AACE Program Committee may opt to designate one of the speakers to also act as the symposium Chair; however, management companies should plan for four (4) total faculty members.

Program agendas should provide for 1.75 CME credit hours and include sufficient time for Q&A.

Example:

00:00- 00:10  Intro & Educational Objectives (Chair)
00:10- 00:35  Presentation A (Speaker 1)
00:35- 01:00  Presentation B (Speaker 2)
01:00- 01:25  Presentation C (Speaker 3)
01:25- 01:45  Q&A (All faculty)

All satellite symposia will be preceded by a modest food function. AACE’s satellite symposia time slots are scheduled to allow additional time beyond the 1.75 CME credit hours on the agenda to accommodate this function.
Meeting Space & Time Slots
Meeting rooms for satellite symposia will be provided by AACE at the JW Marriott. The food function and educational session will be in the same room with set-up per AACE specifications (rounds, buffet service). Based on room size and AV space requirements, each room is expected to accommodate approximately 300 people. Management Company will have access to room 1 hour prior to start of meal function.

There are multiple time slots for satellite symposia with each currently slated to hold two (2) concurrent symposia*.  

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<tr>
<th>Date</th>
<th>Time Slots</th>
<th>Meal Function</th>
<th>Session Time</th>
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<tbody>
<tr>
<td>Wednesday, May 3</td>
<td>2 time slots at 5:30 pm – 7:45 pm</td>
<td>5:30–6:00pm Dinner / 6:00–7:45pm Session</td>
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<tr>
<td>Thursday, May 4</td>
<td>2 time slots at 5:15 am – 7:30am</td>
<td>5:15–5:45am Breakfast / 5:45–7:30am Session</td>
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<tr>
<td>Thursday, May 4</td>
<td>2 time slots at 7:15 pm – 9:30pm</td>
<td>7:15–7:45pm Dinner / 7:45–9:30pm Session</td>
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<tr>
<td>Friday, May 5</td>
<td>2 time slots at 5:15 am – 7:30am</td>
<td>5:15–5:45am Breakfast / 5:45–7:30am Session</td>
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<tr>
<td>Friday, May 5</td>
<td>2 time slots at 7:00 pm – 9:15pm</td>
<td>7:00–7:30pm Dinner / 7:30–9:15pm Session</td>
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*Should additional satellite symposia applications be approved once existing slots have been filled, AACE may add a third concurrent symposium to the current time slots and/or create new slots on alternate days/times to accommodate the added symposia.

Attendance
The estimated total attendance for the AACE 26th Annual Scientific & Clinical Congress is 1,800+. Please estimate about 300 for each satellite. Participation levels for an individual symposium can vary greatly. Attendance is strongly driven by the educational subject matter of the symposium.

Attendees will be asked to select the satellite symposia they wish to attend on their meeting registration form. Management companies will be provided with regular updates regarding the pre-registration numbers for their satellite symposium and the overall meeting. This information is provided to assist with planning only. Satellite symposia are ticketed events and attendees with tickets will be given prior access to the room over attendees without tickets (attendees are advised of this on the registration form).

Lead Retrieval
Management companies will have the option of renting additional lead retrieval scanners from AACE’s exclusive Annual Meeting vendor to capture attendee data and attendance numbers for their satellite symposium. AACE will provide (2) scanners and (1) designated AACE staff to assist with “scanning” the incoming attendees.

AV Services
AACE will provide each satellite symposium with a standard AV set: standard black pipe & drape stage backdrop; LCD projection (front/rear and number of screens subject to space availability); microphones (podium, lavaliere, and head table); laser pointer; stage lighting and sound system. Management companies are welcome to purchase additional AV as needed for their programs; however, all equipment and services must be provided by AACE’s exclusive AV vendor for the Annual Meeting. Freeman AV. **NOTE:** This includes Audience Response Systems (ARS) — no outside equipment may be used without prior approval by AACE.

Vendor Contacts

**Advertising**
AACE Publications:  Lori Clawges, lclawges@aace.com / (P) 904.404.4129
Tri-Star Publishing*: Darcey Tenbrink, dtenbrink@tristarpub.com
*(other advertising (door drops, bag inserts, etc.)*

**Audio Visual**
Freeman AV:  Angie Hardwick / angie.hardwick@freemanco.com / (P) 214-333-1812

**Catering**
JW Marriott  TBD

**Lead Retrieval**
QMS Services, Inc.:  qms@prereg.net / (P) 678.341.3000 / (F) 678.341.3099
BUDGET INFORMATION

Management companies are responsible for developing a budget to cover all the required elements of their satellite symposium, any added components/enhancements, and their program management/service fees.

300 Attendees, 1.75 CME Hours

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<th>ITEM</th>
<th>COST</th>
<th>DETAILS</th>
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<td>Required AACE Components and Budget Fees</td>
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| AACE Symposium Fee                        | $65,000| ● CME Accreditation*, Meeting Space, Standard AV, (2) Lead Retrieval Scanners, Membership or Pre-Registration Mailing List, Satellite listings in AACE Annual Meeting Material, Pre-Planning AACE Support and 1 marketing email
   *Live activity only, see Enduring Materials section for spin-off Activity fees |
| AACE Staff Travel                         | $1240  | ● $600 airfare for 1 staff                                                                                                               |
|                                           |        | ● $200 ground transportation for 1 staff                                                                                                 |
|                                           |        | ● $260 1 room night for 1 staff                                                                                                           |
|                                           |        | ● $180 total per diem ($90/day for 1 staff for 2 days)                                                                                     |
| Faculty Honoraria                         | Fair Market Value | ● Budgets should reflect 4 faculty: 1 Chair and 3 speakers                                                                                             |
|                                           | $3200  | ● Management company to budget for ‘Fair Market Value’ honoraria for each proposed speaker                                                                 |
| Faculty Registration                      | $3200  | ● $800 per faculty*                                                                                                                        |
|                                           |        | *AACE will advise management company if satellite symposium faculty is eligible for complimentary registration based on AACE membership status, i.e., Board of Directors, Past President, etc.) |
|                                           |        | ● Actuals will be acknowledged during budget reconciliation                                                                                 |
| Faculty Travel                            | $4,960 | ● $600 airfare for 4 faculty                                                                                                               |
|                                           |        | ● $200 ground transportation for 4 faculty                                                                                                 |
|                                           |        | ● $260 1 room night for 4 faculty                                                                                                          |
|                                           |        | ● $180 per diem for 4 faculty ($90/day for 2 days for 4 faculty)                                                                              |
|                                           |        | ● AACE will advise if satellite symposium faculty member(s) are also confirmed as Clinical Congress faculty or AACE Board Members to coordinate faculty travel and accommodation expenses. |
|                                           |        | ● Actuals will be acknowledged during budget reconciliation                                                                                 |
| Audio/Visual Support                      | $3401  | ● $3401 for A/V Technical Support and Labor: Production Manager, Audio Techs and Lighting Techs for satellite symposia operation           |
|                                           |        | ● Any additional A/V equipment and tech support is at the expense of management company                                                 |
| Food Function                             | $80-110| ● Must budget for minimum of 300 people                                                                                                    |
|                                           |        | ● Menu must be buffet style                                                                                                                |
|                                           |        | ● Menu selections must include options for vegetarian and five (5) kosher dietary requests                                               |
| On-Site Signage                           | Total Cost determined by management company | ● Minimum of 1 sign and 1 display board artwork required
   1 sign for door/entry way: max size is 28” x 44”
   See description on page 5 (#2) for AACE Satellite display board |
### Required AACE Components and Budget Fees

#### Syllabus

| Total cost determined by management company | • Minimum 300 printed and/or electronic syllabi made available to symposium attendees  
• Management Company to provide 3 copies of their syllabus to AACE staff |

#### Optional Components

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<th>Advertising</th>
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| • AACE Publications:  
  - *The First Messenger* newsletter  
  - *Endocrine Practice* journal  
| • Annual Meeting-specific materials via third party vendor, including:  
  - ePreview newspaper  
  - On-site daily newspaper  
  - Convention center bag  
  - Symposia room drop bag  
  - Hotel room drop  |

| Additional AV & ARS | Available exclusively through Annual Meeting A/V vendor; outside A/V and ARS only if prior approval  
| --- |  
| • Additional equipment:  
  - Confidence monitors  
  - Additional Audience microphones  
  - Enhanced lighting  
| • Additional services:  
  - ARS operator  
  - Audio recording  
  - Video recording  
| • See Freeman A/V Form for pricing and additional offerings  |

| Onsite Signage | • Optional additional signs not to exceed 28" x 44" and will be displayed around hotel and convention area, exact locations will be determined by AACE. Maximum of (3) additional signs are allowed.  |

| Lead Retrievals | • Approximately $350 per unit (not including the 2 lead retrieval scanners provided by AACE)  |

| Slide Review Room | • Should Management Company want to secure space at the Annual Meeting venue, an Ancillary Meeting Request form will need to be completed and returned to AACE for review. If approved, Management Company will work directly with the venue and be responsible for any and all expenses. Forms to be provided upon request.  |

| Enduring Materials | • Separate activity budget from live activity  
• Separate program approval process and fee structure  
• Further details on Enduring Materials can be found on next page  |
ENDURING MATERIALS

While both the live and enduring activities may be approved by a single grant from a commercial supporter, they are each a separate medium of learning. Therefore all enduring materials undergo a separate review and approval process. **NOTE:** Enduring materials accredited by AACE can be a maximum of 1.75 credit hours.

Overview

AACE welcomes spin-off activities that enhance the educational reach of satellite symposia presented at our Annual Meeting. Like the live satellite symposia, enduring material spin-off activities are directly accredited by AACE.

Management companies must indicate on their request form if any enduring material spin-offs are being developed from their live activity and if so, indicate whether funding is being requested for the live and enduring together or via separate grant requests. As noted previously, management companies may not submit grant requests to any commercial interests without authorization from AACE; this includes requests for enduring materials.

Once an enduring material has been authorized by AACE and a fully executed Letter of Agreement is on file with the commercial supporter, the management company will receive necessary forms from AACE in order to aid in the planning and execution of the enduring material spin-off, i.e., CME Application for Enduring Materials, Enduring Material Checklist.

Fee Schedule

As separate activities, enduring materials also have separate AACE fees which vary based on the type of activity (i.e. on-line, monograph, etc.). A complete fee schedule has been attached; management companies should ensure the appropriate fees are including in their enduring material budgets.

Development Process & Timeline

Enduring materials are typically not released prior to three (3) months after the live activity at the Annual Meeting; however, management companies are encouraged to start working on their enduring activity immediately after the live program so they are ready for release as soon as possible.

The following steps outline the enduring material process with the estimated time allotments for each step:

1. **Concept Approval:** Following the completion of the live activity, the management company must complete and return an Enduring Material CME Application. The complete Enduring Material CME Application is submitted to the CME Accreditation Committee Chair for concept approval. Once the activity is approved in concept, the management company will receive an approval email that they may move forward with the development of the enduring material. If the enduring material will be hosted on the AACE Learning Management System (LMS), AACE staff will build the activity with content provided by the management company.
   **Time Allotment:** Approximately 1 week (Approximately 4 weeks for enduring material construction on AACE LMS).

2. **Review:** Once the activity is in its final form, CME Department staff will review the activity to ensure all items in the Enduring Material Checklist are included. If any items are missing, incomplete or require an update this information must be corrected prior to approval and release. Following staff review, the CME Accreditation Committee will then review the activity including all content and the post activity assessments.
   **Time Allotment:** Approximately 1 week per staff review (multiple reviews may be required); approximately 1 week (Committee review)

3. **Approval:** Once staff receives a majority approval from the CME Accreditation Committee, the management company will receive an approval letter via email advising that they may launch their activity. Upon approval, the management company will be reminded to update the release and expiration dates for the activity, submit their final budget reconciliation and provide final copies, i.e., print or URL link, of the educational activity. If hosted on the AACE LMS, AACE staff will launch the activity.

4. **Post Activity:** The management company is required to submit a monthly participant database to AACE with data regarding who has participated in the activity. Once an activity has expired, the management company must submit an evaluation summary for the duration of the activity. If hosted on the AACE LMS, AACE staff will handle these responsibilities.

Financial Policies & Milestones

In accordance with ACCME Standards for Commercial Support, it is AACE’s policy that all funds and support associated with a CME activity, whether in the form of an educational grant or not, must be given to the accredited provider (AACE). Enduring material funds will be distributed to the management company upon achievement of the two required milestones listed below. Payments to management company, regardless of milestone achievement, can never exceed the balance of funds received by AACE from commercial supporter.

1. **Concept Approval**
   a. 90% of enduring activity grant, less AACE fee(s).
   b. Funds will be distributed upon receipt from commercial supporter- if less than 100% received at time of milestone achievement, remaining balance will be paid immediately upon AACE’s receipt of funds.
2. **Activity Release & Budget Reconciliation**
   
   a. Up to 10% of enduring activity grant - exact amount based on final budget reconciliation.
   
   b. AACE will retain any unused grant funds for return to commercial supporter.

### Endocrine Practice Supplement

AACE offers the opportunity to be a sole-supporter of a supplemental issue of *Endocrine Practice*, the official peer-reviewed journal of the American College of Endocrinology (ACE) and AACE. The supplement is sent to all domestic AACE members in autumn 2016, posted on the AACE website for one year, and distributed at national society meetings where AACE exhibits, including the American Thyroid Association, The Endocrine Society, and the American Diabetes Association. Additionally, the supplement will be mailed out to non-member subscribers, which include medical libraries and institutions worldwide, and posted on the *Endocrine Practice* website, where it will be available to online subscribers to the journal.

*Endocrine Practice* is a peer-reviewed journal that publishes the latest information in the treatment of diabetes, thyroid disease, obesity, growth hormone deficiency, sexual dysfunction and osteoporosis. The journal contains original articles, case reports, review articles, commentaries, editorials, visual vignettes, as well as classified and display advertising. Special issues of the journal also include AACE clinical practice guidelines. The journal is indexed in MEDLINE, Science Citation Index Expanded (Web of Science), Current Contents - Clinical Medicine, EMBASE, and Current Abstracts – EBSCO.

Articles considered for supplements are peer-reviewed by the *Endocrine Practice* editorial board. A publication date can be projected when the manuscripts are accepted. Typically, the supplement is published four months after acceptance of manuscripts. Please note that requests to publish supplements with specific issues of *Endocrine Practice* will be reserved as the requests are received and the satellite companies give confirmation to proceed with publication. In an effort to provide a more timely publication of the satellite supplements, *Endocrine Practice* may consider polybagging and mailing more than one supplement with an issue of the journal if both satellite companies agree and supplement topics do not overlap.

Sole-supported supplemental issues of EP may be purchased for approximately $30,000 (for any supplement 36 pages or less).

**Please contact AACE for additional rate information.** This fee applies to all NON-CME supplements published from satellite presentations at the 2016 AACE Annual Meeting and covers all editing, composition, printing (supplement cover in addition to text pages), and mailing 4,500 copies to all domestic AACE members, standard bulk mail in a plastic bag with a regular issue of *Endocrine Practice*. Additional fees apply if this supplement is to be accredited for *AMA PRA Category 1 Credit(s)*™

Please see the attached Enduring Materials Fee Schedule for appropriate costs.

**NOTE:** AACE must be the accredited provider of CME supplements to *Endocrine Practice*.

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**Cancellation Policy for Live and/or Enduring Activity**

AACE has established a cancellation policy for AACE Annual Meeting Satellite Symposia as follows:

- The third-party management company is required to provide confirmation in writing from the supporter or the supporter’s grants office that the program has been officially approved by the supporter. In the event that the management company has not provided confirmation in writing from the supporter or the supporter’s grants office, and the supporter chooses not to provide support for the program at any time, AACE will impose a cancellation fee of $10,000 and any out-of-pocket expenses already incurred by AACE, to the third-party management company.

- If the supporter withdraws its support of the intended program a cancellation fee of $10,000 and any out-of-pocket expenses will be charged to the commercial supporter.
In order to be considered a "spin-off" activity, enduring materials developed from AACE Satellite Symposia must equal the amount of credit awarded for the live activity for a maximum of 1.75 credit hours. **NOTE:** AACE serves as the sole accredited provider of all spin-off enduring materials.

### Online Enduring Material Hosted on AACE Learning Management System (LMS)

- Accreditation for 1.75 hours ($10,000/credit hour) | $17,500.00
- Marketing
  - includes listing in First Messenger, Online News, www.aace.com, and AACE LMS | $2,400.00
- LMS
  - includes activity construction on LMS, hosting, and usage reporting for 1 year | $11,500.00
- **Subtotal** | **$31,400.00**

### Online Enduring Material Hosted on Non-AACE LMS

- Accreditation for 1.75 hours ($12,000/credit hour) | $21,000.00
- Marketing
  - includes listing in First Messenger, Online News, www.aace.com, and AACE LMS | $2,400.00
- **Subtotal** | **$23,400.00**

### Print Enduring Material as Endocrine Practice Supplement

- Accreditation for 1.75 hours ($10,000/credit hour) | $17,500.00
- CME Certificates | $3,750.00
- Endocrine Practice
  - Includes all editing, layout/design, printing and mailing | $30,000.00
- Marketing
  - includes listing in First Messenger, Online News, www.aace.com, and AACE LMS | $2,400.00
- **Subtotal** | **$53,650.00**
American Association of Clinical Endocrinologists
2017 Annual Meeting Satellite Symposium Request Form

Please complete one form per activity and commercial entity. This request form must be received by AACE before any grant requests are submitted to potential commercial supporters, including responses to RFPs. Grant requests may only be initiated once authorization is provided by AACE. See 2017 AACE Annual Meeting Satellite Symposia Guidelines for more information.

Requesting Organization: ____________________________________________________________
(Management Company)

Contact Person:____________________________________________________________________

Phone: __________________________________ Email: _________________________________

Address: _________________________________________________________________________

Title of Proposed Activity: ______________________________________________________________________

Supporting Commercial Entity: ______________________________________________________

Is this in response to an RFP? □ No □ Yes, RFP# ____________________________

Grant Information

☐ Live only

☐ Live + Enduring: Please indicate the type(s) of enduring activities being proposed by checking all that apply:

☐ Online Activity ☐ Two Media with exact same content, e.g., Online and Monograph

☐ Endocrine Practice Journal Supplement ☐ Stand alone Publication

☐ Other, please describe (will require AACE approval and advice on fees): __________________________

Please indicate if live and enduring activities will be submitted as:

☐ Same Grant Request ☐ Separate Grant Requests

I have read the AACE Satellite Symposia Guidelines and agree to comply with all AACE policies and procedures including, but not limited to:

● AACE is the sole accredited provider and grant payee for satellite symposia for both the live activity and any enduring spin-off materials. Applications with alternate provider/payee information cannot be accepted.

● Activity budget(s) must include the appropriate allotments for AACE live and enduring fees.

Authorized Signature: ______________________________________________________________________

Printed Name: __________________________ Date: __________________________

Please send completed and signed forms to: satellites@aace.com.