Education and Training

Continuing Education Mission Statement
Approved by Council 1/11/06, amended by Council 9/11/09, amended by Council 1/14/11, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17; updated 5/13/21

Mission
The mission of SCCM is to secure the highest-quality care for all critically ill and injured patients.

Envisioned Future
SCCM envisions a world in which all critically ill and injured persons receive care from a present integrated team of dedicated, trained intensivists and critical care specialists.
Multiprofessional teams use knowledge, technology, and compassion to provide timely, effective, safe, efficient, and equitable patient-centered care.

SCCM Organizational Guiding Principles
- Promote a healing, safe, and effective critical care environment for patients, their families, and caregivers wherever critical care is delivered across the healthcare continuum
- Promote the implementation of the integrated team of dedicated experts in the ICU for delivery of the highest-quality, safest, most effective, and most cost-efficient critical care
- Advocate to patients, the public, and policymakers that critical care is a compassionate, patient-centered discipline
- Advocate career pathways in both research and clinical critical care that will attract and retain a quality team of personnel dedicated to improving the care of the critically ill and injured
- Provide the finest education for healthcare professionals, the public, and policymakers regarding optimal delivery of critical care
- Promote and support quality research into all aspects of critical illness and injury
- Promote measurement of outcomes and processes to inform and improve patient care
- Promote member participation in quality improvement activities
- Foster development of critical care practitioners and leaders

Expected Results
As a result of their participation in the accredited continuing education (ACE) program, learners will demonstrate improvement in competence and/or performance. Metrics for determination of success include the following:
- Competence: Outcomes assessments will demonstrate learners' commitment to applying new strategies in practice through intent-to-change questions or paired questions, case scenarios, and audience response questions.
- Performance: Outcomes assessments will show that learners implemented new behaviors in their practices through three- to six-month follow-up surveys and focus groups.

Policy on Transparency
Approved by Council 1/14/11, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17

SCCM's ACE and COI policies are contained in the SCCM Policy Manual available on the SCCM website.

SCCM will publicly disclose company support for educational grants, corporate sponsorships, charitable contributions, in-kind support, and research grants when appropriate during all educational activities. Acknowledgement of program sponsorships may occur on signage in registration and other areas and by an announcement at the beginning or end of the program, as well as on slides between sessions. Key Society Leaders and members of the Council are required to disclose all financial and uncompensated relationships, including permitted research support.

Policy on Independence

Approved by Council 1/11/06, amended by Council 2/14/11, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17

All ACE activities sponsored by SCCM shall provide an in-depth presentation that is independent, balanced, objective, and scientifically rigorous.
To maintain the independence of SCCM, the following decisions regarding educational activities must be made free of control of an ineligible company:

- Identification of ACE needs
- Determination of educational objectives
- Selection and presentation of content
- Selection of all persons and organizations that will be in a position to control the content of the ACE activity
- Selection of education methods
- Development of instructional materials or post-activity documents
- Evaluation of the activity

Independence of the ACE provider must be stipulated in the Company Support Letter of Agreement (LOA).
Ineligible companies cannot take the role of the nonaccredited partner in a joint provider relationship. Ineligible companies are those whose primary business is producing, marketing, selling, reselling, or distributing healthcare products used by or on patients. Examples of such organizations include:

• Advertising, marketing, or communication firms whose clients are ineligible companies
• Biomedical startups that have begun a governmental regulatory approval process
• Compounding pharmacies that manufacture proprietary compounds
• Device manufacturers or distributors
• Diagnostic laboratories that sell proprietary products
• Growers, distributors, manufacturers, or sellers of medical foods and dietary supplements
• Manufacturers of health-related wearable products
• Pharmaceutical companies or distributors
• Pharmacy benefit managers
• Reagent manufacturers or sellers

In-kind company support involving equipment for educational workshops may be received. However, content will be developed independently from industry input. Industry technicians will have a limited role during SCCM skill station activities, allowing them to correct any technical problems related to equipment and to inform speakers of the general use of their products prior to the presentation. Industry technicians will offer no educational content development ideas during program development or skill station presentations.
All SCCM products, services, and position statements that are not part of education programs must go through the same rigorous disclosure and resolution process as ACE activities.

Efforts to seek educational grants, corporate sponsorships, charitable contributions, and research grants will be separate from programming decisions. Only the marketing staff will communicate with companies. Committee members and staff involved in program development are prohibited from discussions with companies.

Policy on Content and Format
Approved by Council 1/11/06, amended by Council 2/14/11, reaffirmed by Council 9/10/11; amended by Council 5/6/17

Introduction
In accordance with SCCM's Accredited Continuing Education Mission Statement, ACE offered by SCCM is ultimately for the purpose of improving quality of care and safety for the patients whose healthcare professionals are SCCM's learners as well as an improvement in professional practice by those learners.

Definition of ACE
According to the ACCME, the definition of ACE is as follows: "Accredited continuing education consists of educational activities that serve to maintain, develop, or increase the knowledge, skills, and professional performance and relationships that a healthcare professional uses to provide services for patients, the public, or the profession. The content of ACE is that body of knowledge and skills generally recognized and accepted by the profession as within the basic medical sciences, the discipline of clinical medicine, and the provision of healthcare to the public."

Further to this definition is the content that the ACCME considers acceptable for activities developed within an accredited provider's ACE program. Examples of topics that are included in the definition of ACE content include:

- Management, for healthcare professionals responsible for managing a healthcare facility
- Educational methodology, for healthcare professionals teaching in a medical school
- Practice management, for healthcare professionals interested in providing better service to patients
- Coding and reimbursement in a medical practice

The Origin of ACE Content
SCCM's planning staff collaborates with the Accreditation and Learning Strategies Committee on both a planned annual basis as well as individual ad hoc sessions to identify practical issues that arise in the scope of healthcare professionals' practices in each of the core clinical areas in which education is planned by SCCM. This ideation process generates a formal process of gap analysis.

SCCM applies a traditional and classical gap analysis process based on isolating learner problems in practice based on a comparison of current versus best practices. Once learner gaps are identified, they become the basis for the development of learning objectives, which in turn inform the content of ACE interventions certified by SCCM.

Identification of Intended Educational Outcomes
For each identified professional practice gap, SCCM's planners make a determination as to the focus of education and its related intended outcomes. Options include an improvement in: 1) learner competence, 2) learner performance-in-practice, and/or 3) patient outcomes. Often it is a combination of all three possible outcomes.

The choice of educational outcomes measurement tools relates directly to the intended outcome linked to each identified gap that is consistent with the metrics contained in the ACE Mission Statement.

Identification of Factors Outside SCCM's Control That Impact on Patient Outcomes
Planners must give careful consideration to factors outside their control that impact patient outcomes. Once identified, planners must also develop strategies to remove or address those identified factors and

barriers in the content of the ACE activity. SCCM will demonstrate an awareness of a list of such factors that contribute to the healthcare quality gap about which SCCM is concerned. Emphasis is placed on strategies for learners to adopt that can address or overcome the barriers.

Implementation of Educational Strategies to Remove, Overcome, or Address Barriers to Healthcare Professional Change

SCCM will collect information and data related to barriers to healthcare professional change from its learners and incorporate these insights into its ACE program through the activities and interventions that it generates. Emphasis is placed on strategies for learners to adopt that can address or overcome the identified barriers.

Preparation of Learning Objectives

As a final step in the development of ACE content, SCCM's planners will write learning objectives that reflect best practices from the gap analysis, the results of the analysis of scope of practice, and the type of intended results stipulated in the planning process.

Learning objectives are written in terms of competence, performance, and/or patient outcomes and are measurable.

Content OF ACE

Educational Outcomes Measurements

Every SCCM ACE intervention will include one or more outcomes measurements that link to the intended outcomes as indicated above. The choice of an educational outcomes measurement tool depends on whether the intervention was designed to improve competence, performance, and/or patient outcomes.

Independence

SCCM is solely responsible for the development of all aspects of the planning of ACE, including:

- The gap analysis that is the foundation for the activity
- Designation of intended outcomes
- Development of learning objectives
- Analysis of the scope of practice of targeted learners
- Selection of educational methods and formats
- Selection of faculty, other teachers, and planners
- Choices of outcomes measurement tools

Under no circumstances will SCCM consult with ineligible companies to validate the content of the activity, suggest faculty resources, or distribute the content of the ACE activity. Furthermore, planners or faculty of ACE activities will not be employees of relevant ineligible companies. With regard to referencing trade names, as a general rule, SCCM does not reference trade-named products in its educational materials. Should a situation arise in which the use of a trade name is warranted because learners would not recognize the generic or scientific name of the product referenced in the context of treatment discussions, then all products mentioned should reference their trade names so as not to distinguish the products of an ineligible company.

All certified content will observe the following policies:

- The content of ACE activities does not promote the proprietary interests of any commercial interest.
- ACE activities will provide a balanced view of therapeutic options and conform to the generally accepted standards of experimental design, data collection, and analysis.

- Recommendations involving clinical medicine in a ACE activity will be based on evidence that is accepted within the medical profession as adequate justification for their indications and contraindications in the care of patients.
- Content will not contain recommendations, treatments, or manners of practicing medicine that are not within the ACCME and American Medical Association definition of ACE, are known to have risks or dangers that outweigh the benefits, or are known to be ineffective in the treatment of patients.

Appropriate Use of Company Support

Approved by Council 1/11/06, amended by Council 2/14/11, reaffirmed by Council 9/10/11; amended by Council 5/6/17; amended by Council 5/13/21

SCCM fully supports and adopts the ACCME Standards for Integrity and independence in Accredited Continuing Education, Accreditation Council for Pharmacy Education's Criteria for Quality Involved with the Administration of a Provider's Continuing Education Program, and the standards set by the American Nurses Credentialing Center as its basis for any company support with regard to ACE.

The Society implements these standards and has integrated additional policies that continue to maintain the highest integrity in providing quality ACE programs. The SCCM's comprehensive policies provide the foundation for the administration, content, and quality of all educational activities, which includes activity goals and objectives development, promotional material, text content, faculty approval and guidance, activity evaluation, and issuance of certificates.

Independence

In accordance with the Standards, SCCM develops its ACE activities independent of any ineligible company. Specifically, an ineligible company can have no involvement in the following:

- Identification of practice gaps and needs that become the foundation for the activity
- Preparation of, or input into, the learning objectives
- Selection and presentation of content
- Recommendation of persons to serve as faculty for the activity or any other persons that will be in a position to control the content of ACE
- Influence over the selection of the educational design for the activity
- Selection of vendors or methods for the evaluation of the activity
- Requests for "technical review" of the content of the ACE activity by supporters will not be accepted.
- Sharing of names or contact information of learners with the supporter or its agents without the explicit consent of the individual learner

Management of Funds

Written Letters of Agreement

- SCCM requires that a written LOA be signed by SCCM and the supporter. This document specifies terms and conditions in compliance with the Standards. Specifically, no language will be permitted in the LOA relating to any requirements for the supporter's involvement in content, faculty selection, and methods as described above. The LOA may be either SCCM's document or one produced by the supporter, in which case the language is vetted for adherence to all requirements of the Standards.
- A LOA will be completed for both in-kind funds and educational grants, and the purpose of the in-kind support will be specified.

Control of Funds

SCCM controls all aspects of the management of funds from a supporter. Even in cases in which there is an educational partner or joint provider, SCCM is a signatory to the LOA and is in full control of all decisions and agreements relative to such funds.

Additional Funds Provided to Those in Positions to Control Content

SCCM ensures that supporters of a ACE activity are not providing additional funds to those in a position to control content relative to the specific ACE activity. This requirement is included in both the LOA and faculty letters and agreements.

Provision of Funds to Learners

SCCM does not provide funds to offset the costs of attending ACE activities for its learners. Such honoraria and expense support is provided only to planners and faculty associated with the activity.

Social Events

Social events that take place at an ACE activity, regardless of whether these events are provided with funds from a supporter or not, may not compete with or overtake the ACE activity. SCCM permits only modest meals or receptions at its ACE activities for the purpose of promoting interaction and exchange between faculty and learners.

Transparency to Learners

SCCM acknowledges the receipt of educational grants. Such information is made transparent to learners by publishing this information for all in-kind and actual support grants in the general information pages located at the beginning of the activity.

Separation of Education from Promotion

Promotion of Proprietary Interest of Commercial Interests

Marketing, exhibits, and nonaccredited education developed by or with influence from an ineligible company or with planners or faculty with unmitigated financial relationships must not occur in the educational space within 30 minutes before or after an accredited education activity. Activities that are part of the event but are not accredited for continuing education must be clearly labeled and communicated as such.

SCCM ensures that activities do not promote the interests of product manufacturers through the following safeguards:

- Activities linked to analyses of learner gaps and other needs: ACE activities are planned based on clear gaps in knowledge and/or performance, the expert opinions of recognized experts in the field, national guidelines, or authorities' description of best practices.
- Content validation practices: The content of ACE activities is vetted independently so as to ensure that commercial bias is not present and that the material is scientifically accurate, based on evidence acceptable to the profession, and that treatments discussed are appropriate. SCCM has a standard form for this purpose.
- Retrospective learner feedback: Evaluation mechanisms always contain questions that serve to demonstrate that learners did not perceive commercial bias in the materials from a specific teacher or author. If bias is perceived, this information is provided to the planners, faculty, and others so that an improvement plan can be determined and outcomes of the improvements monitored. The learner will have to provide a description of the bias. This information will be evaluated by the SCCM leadership and determined whether it is relevant or not. If there is relevant commercial bias, SCCM leadership or staff will contact the speaker and inform him/her of the finding of potential bias. This will be documented, and further participation by that speaker in SCCM ACE activities will be limited or ceased. If the commercial bias accusation is determined to not be valid, the speaker will be informed of

that decision. In both cases, the learner will be informed of the decision. It is always a goal of SCCM to have zero commercial bias in a ACE activity.

Exhibits

SCCM permits exhibits to be presented in the context of an ACE activity. However, exhibit space is rented or otherwise provided to the exhibitor in contrast to the provision of a marketing strategy. SCCM does not engage in any marketing practices or services-for-hire for an ineligible company.

Exhibits are not permitted in the educational room, or in the case of enduring materials or Internet-based ACE, within the space of the educational content.

Exhibits are never a condition for the receipt of an educational grant. Should an exhibit be requested, a separate agreement is entered into with the appropriate party from the ineligible company. A fee will be charged for securing exhibit space, and the fee will be consistent for any exhibitor regardless of the organization's involvement in the provision of an educational grant for the ACE activity.

Advertising

- In live activities: An ineligible company is not permitted to advertise its products within the confines of an ACE activity. Any advertising or promotion is confined to formal exhibits. SCCM does not permit subtle advertising by having book bags, pens, or other accoutrements that bear the name of the manufacturer and/or its products within the educational space.
- Print, online, or digital continuing education activities: Learners must not be presented with marketing while engaged in the accredited education activity. Learners must be able to engage with the accredited education without having to click through, watch, listen to, or be presented with product promotion or product-specific advertisement.
- In journal-based activities: While SCCM currently does not offer journal-based ACE, in the future, should it elect to offer this type of ACE, advertising would be permitted in journals containing articles certified for AMA PRA Category 1 credit but these ads could not be within the confines of the certified article or on any partial page of that article. Furthermore, advertising would not be permitted in other parts of the official ACE activity, such as posttests, evaluations, and general ACE pages.

Appearance of Product Group Messages in Course Materials

No product group messages are permitted in any ACE activity certified by SCCM. Given the nature of how learners perceive such messages, steps taken to ensure compliance with this policy include:

- Use of generic scientific names for product descriptions instead of product names
- Insistence on fair balance in discussion of treatment options in which all drugs in a class are compared and contrasted, with treatment recommendations being reviewed by content reviewers to ensure that recommendations made are based on verifiable studies and in the public interest
- Logos from ineligible companies are never permitted on any course materials, including slides, syllabus materials, and other non-educational interventions.
- Corporate logos are not permitted when acknowledging the receipt of support in SCCM course materials of any kind.

The Role of the Supporter in the Provision of ACE to Learners

The supporters of activities have no role in the provision of ACE to learners. Supporters are always acknowledged for their educational grant and, in addition, may provide promotional brochures or flyers to prospective learners as long as these materials clearly delineate SCCM as the provider of the activity and the supporter as provider of the educational grant. Involvement by speakers, presenters, or authors who are employees of an ACE-defined ineligible company are expressly forbidden. The exceptions to this rule are as follows:

- Employees of defined ineligible companies can control the content of accredited ACE activities when the content of the ACE activity is not related to the business lines or products of their employer.
- Employees of defined ineligible companies can control the content of accredited education activities (e.g., as planners, authors, or speakers [including poster presentations]) when the content of the certified ACE activity is limited to basic science research (e.g., preclinical research, drug discovery) or the processes/methodologies of research, themselves unrelated to a specific disease or compound/drug. In these circumstances, SCCM must be able to demonstrate that it has implemented processes to ensure that employees of ineligible companies have no control of ACE activity content that is related to clinical applications of the research/discovery or clinical recommendations concerning the business lines or products of their employer.
- Employees of ineligible companies can participate as technicians in accredited education activities that teach the safe and proper use of medical devices. In this circumstance, SCCM must demonstrate that it implements processes to ensure that employees of ineligible companies have no control of ACE activity content that is related to clinical recommendations concerning the business lines or products of their employer.

Collection of Financial Relationship Disclosure, Mitigation of COI, and Transparency to Learners

Collection of Financial Relationships Disclosures

SCCM collects financial relationship information from all persons in a position to influence the content of ACE in any amount from: a) faculty, b) planners, c) reviewers, d) advisors, and e) staff from SCCM or any educational partner. Information requested is obtained through a standard financial relationships disclosure form that is distributed to all concerned parties prior to an educational activity or accessed from online mechanisms. Information from disclosure forms is analyzed by the ACE director and a mechanism to resolve relevant COI is selected.

Resolution of Reported COI

SCCM requires that everyone who is in a position to control the content of an educational activity disclose all financial relationships with an ineligible company. The Standards define "financial relationships" as financial relationships in any amount occurring within the past 24 months that create a COI. When COI is present, course materials such as slides and syllabus materials are reviewed by the course director and/or the SCCM staff. Should resolution not be possible through content review, presenters may be asked to limit their presentations to the discussion of scientific information only or, in some cases, the presenter may be replaced by a different expert who does not have relevant COI. Resolution of COI, including changes that were identified in materials, is maintained in the files for the activity.

Transparency to Learners

Disclosure information for each presenter, reviewer, planner, and anyone in a position to influence the content is made transparent to learners. Disclosure of relevant financial relationships is published in the course materials so that it may be viewed by learners prior to the start of the activity. Disclosure of the acceptance of support also must be made transparent to learners in course materials. In addition, should in-kind support be received from a supporter, it must be published in course materials and must include the purpose of the in-kind support.

The Society's Key Leaders are not permitted to participate in company-supported symposia as faculty, presenters, chairs, moderators, consultants, or in any other role besides that of an attendee who receives no honorarium or reimbursement.

Management of General Company Support (Sponsorship)

Approved by Council 1/11/06, amended by Council 2/14/11, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17; amended by Council 5/13/21

SCCM accepts company support in the form of general corporate sponsorship. This type of company support is defined as financial support provided to SCCM in support of the Society's mission or specific educational activity or other programmatic activity. Sponsorship opportunities allow for only a company's name and/or logo to be included as acknowledgment of the support and do not confer any rights for product-specific advertising or for exhibiting as described herein.

- SCCM will seek to offer corporate sponsorship opportunities. Corporate sponsorships are not exclusive to one company for one activity; multiple opportunities may be offered per activity.
- All companies will be provided with SCCM's policies and procedures in this regard.
- Arrangements for company support of any type cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of support for ACE activities.
- Company support in the form of corporate sponsorship of the overall educational activity is preferred (i.e., gold, silver, bronze sponsorships, etc.) as opposed to item-specific sponsorship. However, item-specific sponsorship is permitted but should be reasonably limited to maintain the perception of high educational program integrity and the overall high standards for which SCCM is known.
- SCCM generally accepts item-specific sponsorship for:
  - Social events, receptions, breaks, and meals (see Policy on Social Events herein).
  - Technical equipment and support designed to enhance the educational activity, such as interactive audience response systems, personal digital assistant-based schedulers, etc.
  - SCCM's areas of the exhibit hall, such as international, Internet and laptop pavilions, exhibitor lounges, etc.
  - Hotel-related items, such as keycards, in-room videos, table tent cards, etc.
  - Facility/logistical support, such as message centers, registration desks, massage stations, coat/luggage check, shuttle bus videos, bus seat covers, facility rental costs, faculty transportation/housing, etc.
  - Noneducational supplies, gifts, and other materials (i.e., door-drop bags, umbrellas, CD holders, mugs, etc.) may be sponsored by companies. Noneducational supplies as noted herein may be distributed by sponsors at their exhibit booths or placed in common areas away from the educational sessions, but will not be distributed by SCCM personnel. (Companies *may not* sponsor educational meeting supplies, such as registrant bags, portfolio/pads for note-taking, lanyards, badge holders, and pens provided by SCCM as part of the registration materials.)
  - Other items may be sponsored based on the needs and location of the activity and will be considered on a case-by-case basis within the overall spirit of this policy.
  - SCCM specifically prohibits sponsorship of the development of guidelines and practice parameters.
  - SCCM accepts corporate sponsorship of data registries but prohibits corporate sponsors from participating in the direct management of the registry or accessing the registry data.

- Acknowledgment of company support provided to SCCM in the form of sponsorship is required, but will not be interspersed within the ACE content. During live educational events, acknowledgment of program sponsorship (company name only, no logos or slogans) may be printed on signage in registration and by announcement in other areas at the beginning or end of a program, and on slides between sessions. Item-specific sponsorship may be acknowledged by placement of the corporate logo on the item sponsored (e.g., bag, notepad, etc.) or by signage in conjunction with the sponsored activity (e.g., in the lunch area).
- Whenever a specific educational program receives company support in the form of corporate sponsorship, the following statement will be posted on the SCCM website and on the screen during the session if slides are used.

"This is an industry-sponsored educational session. The SCCM XXXXXX Program Committee has chosen the topic and developed the program content based on the needs of program attendees. While SCCM was provided company support to help offset some of the costs related to this event, this funding has in no way influenced the program content or speaker selection. Where selected speakers may have had a potential conflict of interest because of support they or their institution received from industry unrelated to this educational event, the Program Committee has taken steps to actively resolve those conflicts to ensure you are presented with a fair and balanced educational opportunity. However, you should note speakers with potential conflicts of interest by reviewing the speaker disclosures within the course ACE information and pay close attention to speaker disclosures made from the podium immediately before the event to ensure you are aware of these issues during the presentation. Should you have any questions, concerns, or complaints about this issue, you may address them to any SCCM staff member or send an e-mail to the SCCM CEO/EVP at education@sccm.org, who will follow the complaint resolution process prescribed by SCCM policy.

- Non-ACE informational/promotional programs are to be clearly distinguished from Society ACE programs and to occur in facilities other than those where SCCM ACE programs are held. Marketing, exhibits, and nonaccredited education developed by or with influence from an ineligible company or with planners or faculty with unmitigated financial relationships must not occur in the educational space within 30 minutes before or after an accredited education activity. Activities that are part of the event but are not accredited for ACE must be clearly labeled and communicated as such.

Policy on Role of Company-Interest Representatives

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Representatives of companies must agree to abide by the SCCM policies and any other regulations or standards, including LOAs that apply to the planning or implementation of ACE activities.
- A company or its representatives shall not provide ACE activities to learners, including the distribution of enduring materials or arranging for electronic access to ACE activities.
- Representatives of companies must not act as the agents of the accredited provider in the planning or implementation of ACE activities.
- Representatives of companies may attend or participate in ACE activities, but must conduct themselves in accordance with SCCM policies. SCCM will monitor representatives'

behavior. Representatives may not post any materials or signage in or outside the ACE activity's location without prior approval from SCCM.

- Expected behavior includes, but is not limited to, the following:

Representatives of companies:

- o Cannot distribute product promotional materials
- o Cannot pay directly any faculty or author honorarium or reimbursement of out-of-pocket expenses
- o Cannot provide any other payment to the director of the activity, planning committee members, faculty, authors, joint providers, or any others involved with the supported activity
- o Must register with onsite activity planners
- o Cannot wear company/product name badges
- o Cannot participate in the activity by asking questions or inducing participants to ask questions
- o Cannot develop their own activity invitations
- o Cannot invite guests to attend the ACE activity
- o Cannot pay registration and expenses for attendees
- o Cannot transport faculty members to or from the activity

Industry technicians will offer no educational content development ideas during program development or skill station presentations.

- Enduring materials may be provided or sold to companies, but SCCM shall not make any agreement with a company for the distribution of those enduring materials to learners, nor shall SCCM make any agreement with a company to have the company act as its agent in arranging electronic access to ACE activities.

Collection of Relevant Financial Relationships and Mitigation of COI

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In an ongoing effort to provide critical care practitioners participating in its ACE program with activities, products, and services that are objective and scientifically rigorous, the Society has developed the following policy on disclosure of financial relationships or other relationships a faculty member or sponsor has with an ineligible company.

This policy is designed to provide the target audience with an opportunity to review any affiliations between faculty and supporting organizations for the purpose of determining the potential presence of bias or influence over educational content. This policy does not prevent a faculty member with such an affiliation or relationship from participating in the delivery of the educational activity.

A relevant financial relationship is defined as a financial relationship (in *any* amount occurring in the past 24 months). *The relationship becomes a COI when the individual has an opportunity to affect the content of ACE about the products or services of that ineligible company.* Financial relationships are relevant if the educational content an individual can control is related to the business lines or products of the ineligible company. A financial relationship is defined as a relationship in which the individual benefits by receiving salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g. stocks, stock options, or other ownership interest, excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor/research, consulting, speaking, teaching, membership on advisory committees or review panels, board membership, first author on a grant or research, and other activities from which remuneration is received or expected.

General Policy

In order to comply with the Standards, this policy is adopted and the following procedures will be followed:

Every person who has the potential to affect the content of an ACE activity must complete a Disclosure of Relevant Financial Relationships form and return it to the ACE director in a timely manner:

- For planners, the financial disclosure form must be returned prior to planning the activity.
- For faculty, moderators, presenters, and authors (faculty/presenters), the financial disclosure form must be returned prior to commencement of the preparation of their course materials.
- For reviewers, the financial disclosure form must be returned prior to the commencement of content review.
- The financial disclosure form will be a standardized form that contains required types of financial relationships and the ability to specify a manufacturer with whom the person has a relevant relationship, and will represent financial relationships for the person completing the form
- The financial disclosure form shall contain an addendum on which the person completing the form attests to behaviors in his/her role in planning, presenting, or reviewing the activity in accordance with the Standards.

Standards for Integrity and Independence

1. Collect information: Collect information from all planners, faculty, and others in control of educational content about all their financial relationships with ineligible companies within the prior 24 months. There is no minimum financial threshold; individuals must disclose all financial relationships, regardless of the amount, with ineligible companies. Individuals must disclose regardless of their view of the relevance of the relationship to the education. Disclosure information must include the:

   a. Name of the ineligible company with which the person has a financial relationship

   b. Nature of the financial relationship. Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed. Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds.

2. Exclude owners or employees of ineligible companies: Review the information about financial relationships to identify individuals who are owners or employees of ineligible companies. These individuals must be excluded from controlling content or participating as planners or faculty in accredited education. There are three exceptions to this exclusion—employees of ineligible companies can participate as planners or faculty in these specific situations:

   a. When the content of the activity is not related to the business lines or products of their employer/company

   b. When the content of the accredited activity is limited to basic science research, such as preclinical research and drug discovery or the methodologies of research, and the employees do not make care recommendations

     c.   When they are participating as technicians to teach the safe and proper use of medical devices, and the employees do not recommend whether or when a device is used

3.   Identify relevant financial relationships: Review the information about financial relationships to determine which relationships are relevant. Financial relationships are relevant if the educational content an individual can control is related to the business lines or products of the ineligible company.

4.   Mitigate relevant financial relationships: Take steps to prevent all those with relevant financial relationships from inserting commercial bias into content.

     a.   Mitigate relationships prior to the individuals assuming their roles. Take steps appropriate to the role of the individual. For example, steps for planners will likely be different from those for faculty and would occur before planning begins.

     b.   Document the steps taken to mitigate relevant financial relationships.

5.   Disclose all relevant financial relationships to learners: Disclosure to learners must include each of the following:

     a.   The names of the individuals with relevant financial relationships.

     b.   The names of the ineligible companies with which they have relationships.

     c.   The nature of the relationships.

     d.   A statement that all relevant financial relationships have been mitigated. Identify ineligible companies by their name only.

6.   Disclosure to learners must not include ineligible companies' corporate or product logos, trade names, or product group messages. Disclose absence of relevant financial relationships. Inform learners about planners, faculty, and others in control of content (either individually or as a group) with no relevant financial relationships with ineligible companies. Learners must receive disclosure information, in a format that can be verified at the time of accreditation, before engaging with the accredited education.

In accordance with the Content Validity Value Statements, when developing content, planners, faculty, and presenters must ensure the following:

- All recommendations involving clinical medicine in an ACE activity must be based on evidence that is accepted within the profession of medicine as adequate justification for their indications and contraindications in the care of patients.
- All scientific research referred to, reported in, or used in ACE in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, and analysis.
- ACE is an appropriate place to discuss, debate, and explore new and evolving topics. These areas will be clearly identified as such within the program and individual presentations. SCCM will facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning.
- Content shall be linked to the learning objectives for the activity, pertinent to the target audience, and free of commercial bias.
- SCCM staff will track all planner, faculty, presenter, and reviewer COI to ensure mitigation is accomplished prior to the commencement of the activity.
  - COI will be reviewed and documented through the use of a resolution-of-COI form that shall be maintained in the activity file.
  - If a planner/reviewer has a relevant COI, the planner/reviewer will recuse him-/herself from planning or reviewing the content relevant to the reported COI, or a different, non-conflicted planner/reviewer will participate in the planning or review

process to ensure fair balance. Proposed content will be reviewed by the non-conflicted planner/reviewer to ensure it is free of any potential bias. Selection of the faculty will also be overseen and confirmed by the non-conflicted planner/reviewer.

o   If a faculty/presenter has a *resolvable* COI, the presentation materials will be reviewed to ensure fair balance, scientific objectivity, and an absence of commercial bias. Other mechanisms to resolve the reported and relevant COI are: a) refraining from making recommendations on topics on which a COI exists and b) making all recommendations for patient care based on peer-reviewed data.

COI Review Procedure for Planners

All planners will complete a financial disclosure form (or update an existing form) *prior to the commencement of planning.*

No individual will be allowed to plan an ACE-certified activity if he/she owns and/or is employed by an ineligible company as defined by the ACCME (i.e., whose primary business is producing, marketing, selling, reselling, or distributing healthcare products used by or on patients), except in those rare instances in which the employed presenter is not discussing products or services related to his/her employer (such as disaster management).

COI Review Procedure for Faculty/Presenters

The ACE director will review all financial relationships with ineligible companies within the prior 24 months and determine whether any relevant COI exists. If COI does exist, the following methods to mitigate it must be enacted and documented in the activity file.

No faculty/presenter will be allowed to speak at an ACE-certified activity if he/she owns and/or is employed by an ineligible company.

If a faculty/presenter has a COI, SCCM will take steps to prevent all those with relevant financial relationships from inserting commercial bias into content.

a.   Mitigate relationships prior to the individuals assuming their roles. Take steps appropriate to the role of the individual. For example, steps for planners will likely be different than for faculty and would occur before planning begins.

b.   Document the steps taken to mitigate relevant financial relationships.

SCCM may mitigate all COI prior to the activity through one or more of the following steps:

- Introduce a debate format with an unbiased moderator (point/counterpoint).
- Perform peer review for evidence-based content.
- Provide faculty with alternate topic.
- Select alternate faculty for specific topics.
- Achieve divestiture of the relationship.
- Include a moderated panel discussion.
- Limit content to evidence with no recommendations.
- Perform review of all materials associated with the activity by board or planning committee.
- Limit equipment representatives to providing logistics and operation support only in procedural demonstrations.

All relevant financial relationships will be disclosed to learners prior to engaging with the activity and will include:

a.   The names of the individuals with relevant financial relationships.

b.   The names of the ineligible companies with which they have relationships.

c.   The nature of the relationships.

d.　A statement that all relevant financial relationships have been mitigated

If any content is determined to have commercial bias, lack of fair balance, or other issues related to the ACCME's Content Validity Value Statements, the content in question will not be allowed to be presented until it is corrected and re-reviewed by appropriate ACE staff.

COI Procedure for Reviewers

Reviewers should not have any relevant COI.

If a review has COI, a different reviewer should be selected who has no relevant COI.

In those rare instances in which every potential reviewer has one or more COIs and there is no qualified reviewer without COI, then two reviewers should be used to provide check-and-balance.

The mitigation process may involve the chair, moderator/facilitator, faculty, board, or planning committee members who shall have no COI in the matter to resolve.

If an infraction occurs regardless of the resolution noted above, SCCM shall resolve the issue through the following steps:

- The committee/COI Oversight Committee/board will review the infraction and determine whether it was biased.
- A formal letter will be sent to the individual(s) involved in the perceived bias.
- If the perceived bias continues by the individual(s), a second formal letter will be sent.
- If a third instance occurs, the individual(s) will be formally notified and will be unable to present and/or participate in any SCCM activity for a period of two (2) years.

All speakers must disclose all COI from the podium and/or on their slides at the beginning of their presentations. All others must disclose new COIs as they occur.

Joint Providership

Approved by Council 1/11/06, amended by Council 1/14/11, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17; amended by Council 5/13/21

Joint providership is defined as the providership of an ACE activity by one accredited and one nonaccredited organization. SCCM will require third-party organizers of sponsored symposia to use appropriate disclaimers to distinguish the symposia from Society ACE programs in symposia advertising and program materials. A company cannot take the role of the nonaccredited partner in a joint provider relationship.

The Society holds joint and direct provider activities to the same standards. The following describes conditions that must be met in any joint providership into which SCCM may enter:

- The proposed activity must be consistent with SCCM's ACE mission statement.
- SCCM must be involved in the initial planning and development of any joint provider activity it designates for credit. A representative of SCCM must review the content and ensure it is in line with SCCM needs assessment. Upon doing this, a topic-specific needs assessment, learning objectives, design of the educational activity, final faculty selection, and evaluation methodology will then be further reviewed for approval of a joint providership.
- All joint provider activities must comply with SCCM policies. Any funds solicited for the activity must be received by SCCM or be authorized in writing to be delivered to the joint provider, who shall provide full budgets and updates to SCCM in writing. The joint or co-provider may solicit funds with the direction of SCCM and may not make any representations or commitments to funding sources as to content, choice of speakers, or other matters prohibited by SCCM policies. All companies must sign an SCCM-approved joint LOA. The company supporter must be acknowledged in the activity's materials. All faculty,

staff, and Planning Committee members will be required to disclose financial relationships, regardless of size.

- SCCM will review the budget for any proposed joint provider activities to ensure that adequate resources have been devoted to the development of an activity consistent with meeting the activity's objectives. SCCM will withdraw from an activity if resources are inadequate for the development of a high-quality activity.
- SCCM must review and approve all materials associated with the activity prior to their production and distribution. SCCM must be clearly recognized as the lead joint provider. If two organizations are working together to put on the program (e.g., a third-party company is involved), or if SCCM and another organization (e.g., ESICM) are involved, SCCM must take responsibility for the credit and integrity of the program.
- The responsibilities of the non-SCCM joint or co-provider will be clearly enumerated in a joint providership agreement between the non-SCCM joint or co-provider and SCCM. SCCM will withdraw from any joint providership if the non-SCCM joint or co-provider fails to meet its obligations, as described in the agreement, or fails to comply with this policy.
- All potential joint providerships will be examined on their individual merits. Although all ACE activities jointly provided with SCCM must comply with this policy, SCCM reserves the right to refuse to enter into a joint or co-providership for any reason whatsoever, regardless of that organization's willingness to comply with this policy.
- SCCM will charge a fee for its participation in a joint or co-providership activity. This fee and the terms for its payment will be mutually agreed to in the LOA. SCCM identifies the following responsibilities in the LOA:
  - o Negotiation and signing of the company support LOA
  - o Preparation and dissemination of certificates of credit or participation (four to six [4-6] weeks following receipt of the participant list)
  - o Maintenance of official participant records (applicant will also be required to maintain unofficial records for six [6] years)
  - o Handling of participant grievances
- SCCM will communicate and approve all required statements that must appear on activity materials.
- SCCM must review all activity materials and reserves the right to mandate pre-dissemination changes it feels are required for compliance with appropriate regulations or for maintenance of SCCM's integrity. The activity may not take place (or in the case of enduring materials or journal ACE, may not be disseminated) until official approval is granted by SCCM in writing. SCCM will make reasonable efforts to review materials in a timely manner but will not be responsible for delays in implementation of the activity.
- SCCM will specify the documents that the joint provider must provide to SCCM and the schedule for that provision.
- The applicant organization will be notified in writing when its request is approved or disapproved. Promotional or activity materials may not be disseminated without SCCM approval.

Enduring Materials

Approved by Council 1/11/06, amended by Council 1/14/11, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17; amended by Council 5/13/21

Enduring materials are defined as printed, recorded, or computer-assisted instruction that may be used over time and which, *in themselves,* constitute a planned ACE activity.

The following information will be communicated to participants of all ACE enduring materials, prior to the start of the activity:

- Principal faculty, credentials, and disclosures
- Medium or combination of media used
- Method of healthcare provider participation in the learning process
- Estimated time to complete the educational activity
- Dates of original release and the most recent review or update
- Expiration date (date after which enduring material is no longer certified for ACE)
- Acknowledgment of company support (only at the beginning or end of the enduring material but not within the educational content; no advertisement [i.e., trade name or product group message])
- ACE Accreditation Statement
- Type of activity: knowledge, application, or practice

All enduring materials must be reviewed at least once every three (3) years or more frequently if indicated by new scientific developments.

Enduring materials may be provided or sold to companies, and companies may provide SCCM financial support for development and distribution of enduring materials. However, companies may not act as agents or directly assist with the development or distribution of the activity to learners.

Enduring materials may be supported as noted within the policies on sponsorship. Company support in the form of advertising is not permitted for enduring materials.

Also, refer to the policy on independence in this manual.

Journal-based ACE

Approved by Council 1/11/06, amended by Council 9/10/11, amended by Council 5/6/17; amended by Council 5/13/21

A journal-based ACE activity involves the learner reading an article(s) (or adapted formats for special needs), a provider-stipulated/learner-directed phase (that may include reflection, discussion, or debate about the material contained in the article(s), and a requirement that the learner complete a predetermined set of questions or tasks relating to the content of the material as part of the learning process.

SCCM adopts the following policies relative to journal-based ACE activities sponsored by SCCM:

- Depending on interest from the membership, SCCM journals may or may not provide an ACE program.
- Required ACE information, typically contained on a *General ACE Information* page, must be communicated to the learner before the learner begins the ACE activity. This includes the Accreditation Statement, Credit Designation Statement, and Acknowledgement of Support (if any, since journals usually have advertising that supplants specific article-based support).
  - o If the journal is online, this information may not be circumvented by the reader bypassing a location containing this information.
  - o If the journal is in a print medium, this page should be at the front of the journal before the reader encounters the articles conferring ACE credit; it may not be placed at the end of the journal in evaluation or posttest pages.
  - o Additional required information is typically article-specific and is therefore included at the beginning of each article or in a box on the front page of each article, and includes the following information:

- o   The author's credentials
- o   The learning objective(s) for the article
- o   Disclosures from the author, other planners, reviewers, and any staff editors or writers who were involved in the content of the article
- o   The educational content of any article certified for credit by SCCM must be within the ACCME's [definition of ACE](#):

Continuing medical education consists of educational activities which serve to maintain, develop, or increase the knowledge, skills, and professional performance and relationships that a healthcare professional uses to provide services for patients, the public, or the profession. The content of ACE is that body of knowledge and skills generally recognized and accepted by the profession as within the basic medical sciences, the discipline of clinical medicine, and the provision of healthcare to the public.

- •   It is the policy of SCCM that no element of journal-based ACE (content, general ACE information, evaluation, or posttest) contains advertising or product group messages of an ineligible company. In addition, disclosure information will not contain trade names.

- •   In addition, SCCM requires that every journal article certified for credit comply with the [ACCME Essential Areas,](#) Criteria for Accreditation, and policies (including the Standards).

- •   Because a journal-based ACE activity is not considered to have been completed until the learner documents participation in that activity to the provider, SCCM requires that both a posttest and an evaluation be included in each edition of a journal containing certified articles.
  - o   Posttests and evaluations may be located at the end of the journal, or the posttest can be appended to the actual article.
  - o   Both posttests and evaluations are considered part of the educational activity, and the rules regarding placement of advertising apply to these sections. Toward that end and as indicated above, SCCM requires that no advertisements appear within the pages of the posttest and evaluation and, should an advertisement appear on a facing page, that it not be for a product discussed in the article's content.
- •   It is the policy of SCCM that articles certified for AMA PRA credit are planned and written independent of any commercial influence. As such, SCCM requires the following:
  - o   Planners and authors will not obtain input to or feedback from any advertiser or supporter associated with the journal and the article in question.
  - o   Authors/planners must complete the financial disclosure form early in the planning process so the content as well as the individual relationships can be reviewed for COI, and if COI exists, resolution of the COI can be completed prior to the completion of the journal activity.
  - •   In order to provide a balanced activity that meets the requirements of the Standards, SCCM instructs authors early in the selection process to prepare a fair and balanced presentation that takes into consideration patient safety concerns, healthcare professional performance and/or improvements in patient care, content based on evidence acceptable to the profession, fair balance, and scientific objectivity.
  - •   SCCM will not execute any support LOA in which the supporter specifies details of the content of the article, the author who will write the article, or the evaluation methods by which the article is evaluated. Thus, SCCM carefully reviews the clauses contained in any LOA provided by the supporter to ensure that all required language is

included, and conversely, that no requirements have been added that are not in compliance with the Standards.

Distribution Sites and Advertising

Should journal articles be available to learners online, it is the policy of SCCM that such websites are thoroughly vetted to ensure that they are not in the control of, or owned by, an ineligible company. Sites owned or controlled by an ineligible company are not permitted to host or distribute journals or journal articles certified by SCCM.

Online ACE Activities

Approved by Council 1/11/06, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17; amended by Council 5/13/21

Definition: Online-based education consists of any educational activities that are transmitted electronically over the Internet or electronic media.

When the online activity is live, it must include an evaluation that measures outcomes related to the designation of the activity (competence, performance, patient outcomes). In addition, participants must be advised of the minimum performance level that must be demonstrated in the assessment in order to successfully complete the activity for AMA PRA Category 1 Credit. When the online activity is an enduring material, it must also include bibliographic resources for further reference related to the topic of the activity, and the learner must meet a minimum passing score to show mastery of content. Credits are awarded to learners: 1) who meet the minimum performance level as stated above and 2) as claimed by the learner up to the maximum credits for which the activity was certified. Credits are issued in increments of quarter-hours, i.e., 0.25, 0.50, 0.75 and 1.0, etc.

If the online activity is enduring, the activity will be accessed by learners either on SCCM's own website or, if another site provides distribution of the activity as a vendor, then that site may not be owned by an ineligible company.

Advertising of any type is prohibited within the educational content of ACE activities on the Internet including, but not limited to, banner ads, subliminal ads, and pop-up window ads. For computer-based ACE activities, SCCM does not permit advertisements and promotional materials to be visible on the screen at the same time as the ACE content and does not permit them to be interleaved between computer windows or screens of the ACE content.

SCCM requires the following information for online ACE to be communicated to learners either in a General ACE Information section or via tabs or links: a) accreditation statement, b) credit designation statement, c) learning objectives, d) disclosure information, and e) disclosure of support.

Determination of credit for online ACE activities will be based on a beta test of the activity by a small group of learners to ensure the time allocated to the activity is appropriate.

Social Events

Approved by Council 1/11/06, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17; amended by Council 5/13/21

The following policies apply to social events that are held in conjunction with ACE activities:

Social events or meals at ACE activities shall not compete with or take precedence over the educational events.

Social events must satisfy three criteria: a) the value of the event to the healthcare provider should be modest, b) the event should facilitate discussion among attendees and faculty members, and c) the educational part of the conference should account for a majority of the total time accounted for by the educational activities and social events together.

Modest meals and receptions, not to exceed $100 per person, are appropriate social events for ACE activities.

Meals, receptions, or other social events must not be the focus or the primary inducement to attend the ACE activity, nor should information about them in activity invitations give the impression that they are more important than the content of the ACE activity.

Any social activity must have written approval from SCCM if held during an ACE activity.

Advertising

Approved by Council 1/11/06, amended by Council 1/14/11, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17; amended 5/13/21

Advertising is defined as any promotional activity that is product-specific or when any type of action or product quality statement is present. Examples of action statements are "Visit our booth #xxx" or "Company B, the maker of the #1 product in XXXX." However, based on the policy below, advertising in conjunction with an activity is permissible. Advertisements of any type are prohibited in or during educational activities. Advertising activities must be kept separate from ACE activities. See also related policy on Management of General Company Support (Sponsorship), in this manual.

Printed ACE activities: Advertisements and promotional materials will not be interleaved within the pages of the ACE content. Advertisements may face the first or last pages of printed ACE content as long as these materials are not related to the ACE content they face and are not paid for by the companies supporting the ACE activity. SCCM typically permits advertising in its journals and program advertisement materials (i.e., *Critical Connections, CCM, PCCM*, Congress Introductory Program, Congress On-Site Guide, Congress ticketed brochure, Congress Pocket Pal, Congress Review, etc.). Advertisements in these media will be approved by the CEO or Director of Marketing Sales Communications and may be declined if they are not relevant to SCCM members or advertise products or events similar to SCCM offerings and occurring within six weeks before or after SCCM events. Advertisements in or included with SCCM monographs, textbooks, and other book-type publications are not permitted; however, company support in the form of sponsorship is permitted. (See Management of General Company Support.)

Computer-based ACE *Activities*: Advertisements will not be visible on the screen at the same time as the ACE content and not interleaved between computer windows or screens containing the ACE content. Only sponsorship (see below) is permitted on computer-based ACE activities within the parameters set forth in that policy.

Audio- and video-recorded ACE *activities*: Advertisements will not be included within the ACE activity. There will be no "commercial breaks." Only sponsorship (see below) is permitted on audio- and video-recorded ACE activities within the parameters set forth in that policy.

Live, face-to-face ACE activities: Advertisements cannot be displayed or distributed in the educational space immediately before, during, or after an ACE activity. SCCM does not permit representatives of companies to engage in sales or promotional activities while in the space or place of the ACE activity. Advertisements in general registration areas away from the ACE activity, or on buses, hotel door drops, hotel video, hotel keycards, and other areas are permitted but should be limited so as to maintain the perception of a high-integrity educational program. Advertisements are also permitted throughout non-SCCM-utilized portions of the exhibit hall when they are placed in a space separate from the educational activity space.

Educational materials that are part of an ACE activity, such as slides, abstracts, and handouts, cannot contain any advertising, logos, trade names, or product group messages.

Print or electronic information distributed about the non-ACE elements of an ACE activity that are not directly related to the transfer of education to the learner, such as schedules and content descriptions, may include product promotion material or product-specific advertisement.

All items above that are suitable for company support via advertising are also permissible for company support in the form of non-product-specific sponsorship. Items not discussed above are not suitable venues for advertising.

Exhibits

Approved by Council 1/11/06, amended by Council 1/14/11, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17; amended by Council 5/13/21

Arrangements for exhibits or advertisements cannot influence the planning or interfere with the presentation of ACE activities, nor can they be a condition of the provision of company support for ACE activities.

Exhibits must be placed in a space separate from the educational activity space, and not in the requisite entryway to the activity.

A separate contract will be used for exhibit arrangements. This contract will contain the terms, conditions, and prohibitions regarding exhibits associated with the educational activity.

Exhibit income will be accounted for separately from company support income.

The Society's Key Leaders may not participate as leaders or presenters in company promotional or marketing events held in exhibit space.

Expenditures Governing ACE Planners, Faculty, Authors, and Learners

Approved by Council 1/11/06, amended by Council 1/14/11, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17; amended by Council 5/13/21

- ACE planners, faculty, and authors can be reimbursed for any reasonable out-of-pocket expenses (including standard coach airfare, transportation to and from the airport to the presentation site, meals, and standard overnight accommodations), based on the activity. Reasonable honoraria may also be paid.
- SCCM will make the direct payments to the faculty and authors. No other payments will be made to the director of the activity, Planning Committee members, faculty, authors, joint providers, or any others involved with the supported activity.
- All planners, faculty, and authors will be required to complete documentation for reimbursable expenses. To avoid receiving a MISC-1099, U.S. citizens should submit original receipts.
- Reasonable meals and receptions are appropriate social events at an ACE activity and are budgeted using local standard prices.
- The authorization for a joint provider or other educational partner to pay additional honoraria or out-of-pocket expenses shall be documented in a company support LOA between SCCM and the joint provider and/or educational partner.
- Company support is not used to pay for travel, lodging, honoraria, or personal expenses for non-faculty or non-author participants.
- Company support may be used to pay for travel, lodging, honoraria, or personal expenses for employees and volunteers of the provider, joint provider, or educational partner.
- All company support expenditures must be documented and, upon request, provided to the company as a reasonable amount.

Computation of Honoraria

Honoraria will be provided for planners and faculty based on the following standards:

- The amount of an honorarium is consistent with marketplace values for the specialist involved.
- Honoraria may vary depending on the level of expertise of the individual.

- An honorarium will be appropriate to the amount of time away from practice required by the individual.
- Other factors may affect the computation of honoraria, such as published works, national prominence, applicable research experience, etc.
- The maximum standard honoraria—taking all the above factors into consideration—is $1,000. Amounts greater than the established maximum may be allowed for special reasons; such authorization must be documented by a written note to the file and signed by the director of education.

Pre-/Post-Congress Programs and Partnered Meetings

Approved by Executive Committee 3/27/14, reaffirmed by Council 5/6/17

The Society will make available several different types of programs to be held in conjunction with its Critical Care Congress. These may be scheduled immediately before or after Congress, but ideally should not be scheduled in competition with the Congress scientific program.

Three types of programs will be available: 1) core SCCM programs specifically developed to align with SCCM committee programs, 2) educational programs developed by the SCCM Program Committee, and 3) programs developed by external nonprofit organizations and proposed to SCCM.

Core SCCM Programs: Fundamental Critical Care Support (FCCS), Pediatric FCCS (PFCCS), Fundamental Disaster Management (FDM), Ultrasound, Current Concepts in Critical Care (both Adult and Pediatric), and Coding and Billing programs are all considered core SCCM programs developed by SCCM-appointed committees. These programs shall be offered in conjunction with Congress provided that interest remains sufficient, as indicated by participant registration and needs assessment data.

Program Committee-Designated Programs: Additional pre-/post-Congress programs may be offered under the auspices of the Congress Program Committee and SCCM staff. These are not partnered activities, but are programs based on needs of the membership as selected and developed by the Congress Program Committee. These programs should either provide an in-depth focus that cannot be achieved by Congress sessions or offer other opportunities for learning, such as hands-on skill training, small group learning activities, team training, computer-based learning activities, and other types of education or training not typically offered by Congress educational sessions. Such programs have traditionally been termed postgraduate courses at SCCM, although this naming convention may be changed as needed to better reflect the nature of the programming. The number of offered programs should be based on registrant demand and space availability.

Educational Programs Developed with External Nonprofit Organizations: SCCM may hold other pre-/post-Congress programs in conjunction with other nonprofit organizations, such as medical societies, associations, or academic medical centers. Applications for such programs should be made in the form of a written proposal to the Congress Program Committee annually. Applications should be submitted by June 1 for the Congress to be held approximately 18 months later. Staff will evaluate each proposal and, after discussing it with the submitters, make an initial assessment of viability based on the guidelines below. The Congress Program Committee shall consider these programs and determine whether they will provide additional value to Congress registrants and will not compete unduly with SCCM activities. When proposals are received on similar topics, the Congress Program Committee shall give priority based on the perceived quality of the content, proposed faculty, and greatest potential for future partnership. These programs will be offered only if adequate space can be secured by SCCM staff, who shall negotiate written agreements with partnering organizations based on the guidelines below. Two models may be employed regarding these programs. Partnered programs are those developed jointly by SCCM and another nonprofit organization, whereby SCCM assumes all business risks, manages the programs on site, and assumes all financial responsibility. Co-located/hosted programs are developed by a nonprofit organization that desires to hold an independently developed program in the

same city, on the same dates as the SCCM Congress and that manages the program on site, assuming all financial responsibility. Details of responsibilities for each model are shown in the table below.

	Partnered Programs	Co-Located/Hosted Programs
Registration processing	SCCM	Host
Marketing	Cross-promotion	Cross-promotion
Branding	Co-branded	Host only
Logistics	SCCM	Host
Speaker management/ regulation	SCCM policy	Host
A/V, decorating, ARS, etc.	SCCM Congress vendor	SCCM Congress vendor
CE/CME	SCCM and/or partner	Host
Registration fees	Set by SCCM	Set by host
Finances	All revenue and risk to SCCM	Negotiated fee paid to SCCM, revenue and risk to host
Program development	Developed jointly by SCCM and partner	Developed independently by host
Enduring materials	SCCM and partner have ownership	Host has ownership
Online posting of program materials	SCCM and partner	Host
Member/nonmember registration price	No	No
Housing	Through SCCM housing block	Through SCCM housing block
Transportation	SCCM	Host
Third-party sponsorship	Permitted	Not permitted
Skill station equipment	Donated by vendors/hospitals	Rented

From time to time, a hybrid of the two models above may be required to satisfy the needs of both parties. The CEO/EVP shall negotiate such an exception when warranted and in the best interests of the Society.

Industry-Sponsored Educational Programs: SCCM may offer industry-sponsored and industry-related educational events, based on the policy on independence in this manual.

Co-location of Annual Meetings: It is the policy of the Society to encourage that related annual meetings be held in the same city and over the same dates as the SCCM annual Congress. The Society's goal is to create a critical mass of individuals who come together annually to focus on improving the care of the critically ill and injured. Staff and members alike should seek out other organizations and discuss opportunities for annual meeting co-location. Proposals for co-located, partnered, and merged meetings shall be submitted to the Society's executive office to the attention of the CEO/EVP, who will review and discuss the matter with SCCM leadership. Should co-location be deemed desirable to both entities, the CEO/EVP shall negotiate written agreements with the co-locating organization(s).

Grievance Procedures Policy

Approved by Council 1/11/06, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17

To provide for due process in the evaluation and mediation of grievances concerning ACE activities, this Grievance Procedures Policy was developed. Grievances may concern, but are not limited to, the awarding of credit for individual participation and/or registration fees issues.

- A written complaint or grievance should be submitted to the Education Department.
- The Education Department will attempt to resolve the grievance of the complainant.
- If the initial response is unsatisfactory to the complainant, the matter will be referred to the CEO/EVP for action.
- If the response from the CEO/EVP is unsatisfactory to the complainant, the matter will be referred to the SCCM EC. The ruling of the EC will be final.

Endorsement of Educational Programs and Products

Approved by Executive Committee 9/03, updated 2005, updated by Executive Committee 4/10/08, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17

SCCM may grant endorsement to external groups or organizations of their educational programs, including conferences, publications, and products. Requests for endorsement will be considered only from nonprofit organizations.

For conferences, SCCM must receive a copy of the preliminary educational program, an estimated budget, and any promotional materials or brochures in advance of their printing. For publications and products, SCCM must receive the final printed version or a prepublication page proof of the activity, along with a statement describing how the activity will improve care of critically ill or injured patients. The proposed placement of the SCCM logo, if planned, must be shown clearly on the documentation.

The SCCM logo may be placed on the product or publication if the external organization so desires, but it must be noted in the front matter of any material carrying the SCCM logo that SCCM has reviewed and endorsed, but not developed, the activity.

Content review of the activity will be carried out by appropriate SCCM committee or staff. Endorsement will not be granted if the activity is deemed to be competitive with SCCM activities.

Once written approval is obtained from SCCM, no changes are permissible to either the activity itself or the promotional materials associated with the activity without resubmission to SCCM for additional review and reapproval.

A fee shall apply for all endorsements of external activities, as determined by the SCCM CEO/EVP or his/her designate. Waiver of any fees payable requires approval of the SCCM EC. SCCM requires ninety (90) days to review all requests for endorsement, for which a fee will apply. SCCM chapters and sections are not required to pay the endorsement fee, but should refer to the SCCM Authorized Use of Logos Policy in this manual for additional information.

Payment of the fee for endorsement of each activity entitles the external group or organization to one set of SCCM membership mailing labels and one-time use of the SCCM logo. Staff will develop and maintain appropriate procedures and documentation to implement this policy.

Webcast Policy

Approved by Executive Committee 5/5/15; Modified by the Executive Committee 12/14/17; Revised by Executive Committee 1/10/19; Revised by Executive Committee 10/10/19; Revised by Executive Committee 4/14/22

The following webcast/podcast policy is enacted in order to provide quality programming to SCCM members.

All webcasts (online broadcast of a video) should be limited to not more than five speakers plus one moderator who may be paid a reasonable honorarium. All webcasts should be 60 minutes or less. All podcasts (online broadcast of audio) should be limited to up to two speakers plus one moderator who may be paid a reasonable honorarium. Podcasts should be 30 minutes or less.

Webcasts/podcasts are currently categorized as:
- Congress Related

- Grant Sponsored
- Journal Clubs
- Hot Topic/Emergent Content
- Other Educational Programs

Webcasts are offered as a benefit of membership to all professional and select members of SCCM. Others may be charged a registration fee. Podcasts are open to all. All webcasts/podcasts shall be developed to be of interest to the full multiprofessional team and not be profession-specific. All webcasts/podcasts, with the exception of those categorized as Journal Clubs, noted below, require content review by the Accreditation and Learning Strategies Committee prior to posting.

All groups hosting webcasts/podcasts are encouraged to partner with interested sections and other committees/workgroups to co-develop topics for presentation.

No continuing education credit will be offered for webcasts/podcasts; however, all speakers and moderators must disclose conflicts of interest verbally at the time of broadcast. If there are conflicts that require resolution, the staff partner will work with that speaker in advance of the broadcast to ensure this occurs. In certain cases, webcasts/podcasts can be accredited when grant funding is available to cover these costs. The SCCM CEO will have ultimate approval for offering accreditation.

Congress Related

The Congress Program Committee shall be responsible for the selection of the Congress related webcasts/podcasts. A reasonable number of Congress webcasts/podcasts, as determined by the CEO, will be offered to promote and support the educational activities of the Congress. Topics for this category of webcasts/podcasts should align with Congress program topics. These webcasts/podcasts may occur pre/post Congress to extend learning for popular/highlighted topics.

Grant-Sponsored

When grants received by SCCM include funding for webcasts/podcasts, the committee and staff partner that oversee the grant funded program will be responsible for the development of the webcast/podcast. The terms and conditions of these webcasts/podcasts will be determined by the grant document. All grants must align to SCCM strategic initiatives or approved SCCM programming (i.e., Congress or conference related, etc.)

Journal Club

Journal clubs meet regularly to critically evaluate recent articles in the academic literature and are frequently used in the education of graduate or professional students. Journal club webcasts/podcasts should:

- Maintain a regular schedule of not more than one per month, excluding the month of Congress
- Operate the webcast/podcast following SCCM guidelines
- Develop the program based on journal articles
- Utilize standard opening and closing slides
- Identify one or more work group members who will assume responsibility for the project.

Hot Topic/Emergent Content

Hot topic/emergent content webcasts/podcasts may be produced for topics of immediate interest or urgent member need. Webcasts/podcasts of this nature will be expedited due to urgency and immediacy of the education required for SCCM clinicians. Proposed webcasts/podcasts in this category

will be approved by the SCCM President who will also identify SCCM leaders to oversee the content production.

Other Educational Programs

Requests for additional webcasts, including those that would become monthly events, should be made through the strategic planning proposal process for consideration by the Strategic Planning Committee and ultimate approval by Council. Requests for additional podcasts may be made through the Accreditation and Learning Strategies Committee.

Collaboration with Journal Editors for Simultaneous Manuscript Release with Congress

Approved by Executive Committee 9/19/14, updated by Council 1/25/17; updated by Executive Committee 01/13/22

To facilitate the broadest and best educational content at Congress, and to improve the capture and delivery of cutting-edge research, it is important to establish formal relationships between SCCM and journals of high impact with high likelihood of publishing relevant articles to SCCM members and Congress attendees.

Articles selected will be presented by a coauthor during Congress in two (or more) late-breaker sessions. One Congress late-breaker session must be dedicated to an article from either *CCM* or *PCCM.* Additional late-breakers may be chosen from one other high-impact journal, such as:

- *Journal of the American Medical Association*
- *New England Journal of Medicine*
- *Lancet*
- *Annals of Internal Medicine*
- *British Medical Journal*

Journals of other critical care societies or partner societies would require approval from the SCCM Council.

To identify appropriate relevant publications, contact with editors should be initiated by a Program Committee member or Council member who has a relationship with the editor. If there is no such individual, then a formal query will be sent by the SCCM president. Review, selection, and approval of publications for Congress presentation are at the discretion and oversight of the Congress cochairs.

Presenting authors will receive a complimentary registration, airfare (up to $1500), up to two nights hotel accommodation and $100 per diem per presentation day.

Further, it is desired that, following Congress, organized ongoing education based on the session occurs.

Joint Sessions at SCCM/ESICM Annual Congresses

Approved 1/02, reaffirmed by Council 9/10/11, reaffirmed by Council 5/6/17, revised by Council 19/10/24

Each organization will provide for:

- One session on hot topics co-moderated by both leaderships. The hosting society's Program Committee selects the program.
- One thematic session organized by the visiting society. Ideally, the speakers should be on the Congress faculty list with two from ESICM and two from SCCM. The topic will be agreed upon by both leaderships (basis: clinical intensive care). The session will be co-moderated.
- Invited guests. Systematically, the Congress hosting society invites the president and president-elect of the non-hosting society. If the president or president-elect is not a

member of the Congress faculty, his/her own society will cover travel and accommodation costs, with the registration fees waived. If he/she is a member of the hosting society's Congress faculty, travel payment will be made by the hosting society in accordance with the hosting society's policies. Registration fees are also waived reciprocally for both CEOs and other key staff attending the Congress.

Faculty Travel, Registration and Reimbursement Policy

Approved by Council May 6, 2017; Revised by Council September 7, 2017; Revised by Executive Committee November 30, 2017; Revised by Executive Committee November 30, 2017; Revised by Council October 24, 2019; Revised by Executive Committee April 8, 2021

SCCM will reimburse the following groups as outlined below:

Congress

Program Committee Co-Chairs: The Co-Chairs receive 100% complimentary Congress registration, Airfare (economy class, booked at least 30 days in advance), a maximum of 7 hotel room nights and reasonable incidentals (must submit expense report with supporting receipts).

Program Committee: These Committee members will receive 100% complimentary Congress registration.

Plenary Speakers: These individuals receive 100% complimentary Congress registration, airfare (economy class, booked at least 30 days in advance), a maximum of 2 hotel room nights and $1,000 honorarium.

At the discretion of the Program Co-Chairs up to 10 selected speakers annually may be granted special reimbursements. These special reimbursements are reserved for someone who would not otherwise attend the Congress and has a unique perspective that could not be had from the general membership or another speaker already on the program. These speakers will be eligible for a maximum of 100% Congress registration, airfare (up to $1,500), one night hotel (per presentation day), and $100 per diem (per presentation day).

Speakers/Moderators: Speakers and moderators (excluding Research Snapshot Theater and Roundtable moderators) will receive 50% complimentary Congress registration.

Journal Editors: Editors of SCCM and non-SCCM journals (or their designees) who are moderating late-breaker sessions based on an article from their journals will receive 100% complimentary Congress registration.

Late-breaker Authors: see above under the *Collaboration with Journal Editors for Simultaneous Manuscript Release with Congress* policy.

Clinical and Administrative Courses (Includes Congress Pre-and Post-Courses and SCCM Held License Courses)

Chair/Director/Moderator/Faculty: These individuals receive 100% complimentary course registration, Airfare (economy class, booked at least 30 days in advance), a maximum of 2 hotel room nights (one hotel night per faculty presentation day, but individuals are eligible for 2 nights, if travel dates/times warrant the additional day), reasonable expenses per presentation day, and $300 honoraria.

Webinars

Chair/Director/Faculty: These individuals receive 100% complimentary webinar registration and up to $300 honoraria. Moderators may also receive an honoraria depending on the preparation required.

VIP Congress Travel, Registration, and Reimbursement Policy

Approved by Council May 6, 2017, September 2018
SCCM will reimburse the following groups as outlined below:
Executive Committee: These individuals receive 100% complimentary Congress registration, Airfare (economy class, booked at least 30 days in advance), a maximum of 7 hotel room nights and reasonable incidentals (must submit expense report with supporting receipts).
Elected Council: These individuals receive 100% complimentary Congress registration, Airfare (economy class, booked at least 30 days in advance), a maximum of 6 hotel room nights and reasonable incidentals (must submit expense report with supporting receipts).
Honorary Council (ACCM Chancellor, Vice-Chancellor and Chapter Alliance Chair: These individuals receive 100% complimentary Congress registration, Airfare (economy class, booked at least 30 days in advance), a maximum of 6 hotel room nights and reasonable incidentals (must submit expense report with supporting receipts).
Board of Regents (excludes Chancellor and Vice-Chancellor): These individuals receive 100% complimentary Congress registration, Airfare (economy class, booked at least 30 days in advance), a maximum of 5 hotel room nights and reasonable incidentals (must submit expense report with supporting receipts).
SCCM Past Presidents: These individuals will receive 100% complimentary Congress registration.
ACCM Past Chancellors: These individuals will receive 100% complimentary Congress registration.
Lifetime Honorary (Dr. Grenvik): He will receive 100% complimentary Congress registration.
Podcast Host(s): These individuals will receive 100% complimentary Congress registration.
Award Winners: These individuals will receive Congress registration and honoraria as outlined in the Awards Policy – Professional Recognition.
ESICM (president and president-elect): These individuals will receive 100% complimentary Congress registration and a maximum 4 hotel nights each.
AACN (2 reps and CEO): These individuals will receive 100% complimentary Congress registration.
CHEST (2 reps and CEO): These individuals will receive 100% complimentary Congress registration.
ATS (2 reps and CEO): These individuals will receive 100% complimentary Congress registration.
CCM Journal Staff (2): These individuals will receive 100% complimentary Congress registration.
PCCM Journal Staff (1): These individuals will receive 100% complimentary Congress registration.
Presidents of other critical care society's worldwide (1 rep per organization): These individuals will receive 100% complimentary Congress registration.
Members of the Press: These individuals will receive 100% complimentary Congress registration.

Fundamental Critical Care Support Products Program Policies

Amended by Council 9/10/11, amended by Council 5/6/17
The Fundamental Critical Care Support family consists of three distinct products: Fundamental Critical Care Support (FCCS), Fundamental Disaster Management (FDM), and Pediatric FCCS (PFCCS). Each is a proprietary educational curriculum sponsored by SCCM.
FCCS, introduced in 1996, is a multiprofessional instructional program intended to introduce principles important in the initial care of the critically ill or injured patient to healthcare professionals who are not skilled in critical care. Its focus is the early recognition and assessment of the seriously ill patient and discussion of core management strategies for the first 24 hours of critical illness. FDM, introduced in 2003, is a multiprofessional instructional program that addresses the challenges faced by healthcare professionals when confronted with large numbers of critically ill or injured patients in times of natural or man-made disasters. PFCCS, introduced in 2008, is a multiprofessional instructional program specific to the initial care of the critically ill or injured pediatric patient. Paralleling FCCS, the PFCCS audience consists of those healthcare professionals who may be called to care for seriously ill or injured pediatric patients or who may not routinely care for critically ill infants and children.

The curriculum for each course is presented as a series of integrated lectures and skill stations, providing knowledge, guidance for decision-making, and limited practice in some clinical procedures. Curriculum content is problem-based, oriented toward organ system dysfunction, and focused toward critical interventions. Each course may be presented in the traditional face-to-face methodology, or as an online-enhanced course. The online-enhanced course presents the didactic materials within a Web-based format for independent learner use; pre- and posttests are also completed online. Course participants will meet for the hands-on instructor-facilitated skill station component of the course. The online-enhanced option for FDM includes interactive skill stations in conjunction with the didactic modules. The overall program goals of FCCS and PFCCS are to provide information useful to the healthcare professional who must stabilize and manage a critically ill patient until arrival of a critical care professional or pending transfer of the patient to a more suitable facility. FDM offers the core knowledge and hands-on skills needed by all hospital and critical care medical personnel, regardless of specialty, to respond effectively to natural or man-made disasters.

Administration

The SCCM Council is accountable for the Fundamentals programs. Program development for each product is delegated to its individual committee and the respective chair.

The FCCS, FDM, and PFCCS Committees are appointed annually by the president of SCCM. Membership in these bodies shall represent the broad multiprofessional interests of SCCM. The committees are responsible for the approval of curricula, policies, procedures, and guidelines for the programs and serve to advise the chair on all matters. The committees will meet yearly at the SCCM Congress. Actions of the committee are subject to review by the SCCM Council.

The FCCS, FDM, and PFCCS chairs are appointed by the president for two (2) year terms. This position is nonfunded. The chairs are charged with the ongoing implementation of the programs in accordance with existing policies and procedures and serve as the primary liaison to the Program Committee, SCCM Council, and administrative staff. Other duties may include, but are not limited to:

- Supervision of periodic curriculum revisions as directed by the Program Committee
- Review and proposal of revisions of FCCS/FDM/PFCCS program policies and procedures
- Compliance with the document Roles and Responsibilities of SCCM Committee Chairs, as developed/distributed by SCCM
- Representative of SCCM interests in all discussions, grievances, collaborations, etc., regarding the FCCS/FDM/PFCCS programs

Limitation of Liability

The Fundamentals program family is solely an educational curriculum. It is not intended or designed to certify or validate the competency or capability of any individual attendee/graduate to provide specific patient care. The Fundamentals program should not be used to determine healthcare professional credentials or practice privileges in a hospital or ICU. The Society, FCCS/FDM/PFCCS Committees, and course instructors disclaim responsibility for any supplemental material added to the curriculum during individual courses and for the utilization of such information by individual practitioners. This curriculum is not intended to substitute for or delay consultation with a critical care specialist.

Copyright

All materials provided through the Fundamentals program are protected by applicable copyright laws. SCCM prohibits duplication or use of these materials outside of the FCCS/FDM/PFCCS curriculum without specific written permission or through separate sale of specific materials (i.e., syllabus). Audio or video recording of the course by the sponsor or participants is prohibited.

Certificates of Course Completion and Renewal

Attendees who have successfully completed either the FCCS/FDM/PFCCS instructor or provider course requirements will receive a dated certificate of completion. An instructor's certificate will permit the holder to serve as an instructor in future provider courses.

Renewal of the privilege to serve as an FCCS/PFCCS instructor in the United States requires that the instructor teach in at least one provider course every two (2) years and maintain certification or special/added qualifications in critical care where applicable. FDM instructors are not required to be SCCM members. The SCCM office staff and FCCS/FDM/PFCCS Committee chairs are responsible for maintaining records of provider course participation and notification/renewal of instructor status. Requirements for course faculty are contained in the administrative binder for the specific course. It is the responsibility of the SCCM-approved instructors, directors, and consultants to ensure that their teaching activity is reported to SCCM.

Because new information evolves rapidly in the field of critical care and provider course graduates may not fully retain the knowledge gained from this course, providers are encouraged to attend an FCCS/FDM/PFCCS provider course every five (5) years. No notification of renewal is forwarded by the SCCM office to provider graduates.

Accredited Continuing Education

It is expected that ACE credits will be provided to course participants by the sponsoring institution. SCCM will provide ACE credits to course participants who complete the Web-based components of the online-enhanced course option.

Appeal and Grievance

In the unusual event that a dispute arises during an instructor or provider course that cannot be resolved by the course director, or for any other dispute involving a provider healthcare professional or instructor within the administration of the FCCS/FDM/PFCCS program, the following appeal procedure will be followed:

- Notification of the FCCS/FDM/PFCCS manager in the SCCM office by either of the concerned parties.
- FCCS/FDM/PFCCS manager obtains, in writing and within two (2) weeks of notification, full information concerning the dispute, including statements from involved persons. The manager also provides each party with a copy of this appeal procedure.
- Full information is promptly provided to the chair of the FCCS/FDM/PFCCS Committee. The chair reviews available information, may contact parties separately, and provides a decision, in writing, within thirty (30) days, to both parties.
- If either party wishes further appeal, a letter indicating same must be directed to the CEO/EVP of SCCM within sixty (60) days of the chair's decision. Failure to appeal within this period forfeits the party's right to appeal, and the chair's decision remains final.
- The CEO/EVP will provide, within sixty (60) days, information concerning the dispute to the EC and SCCM Council for a final decision. No further appeal is available within the FCCS/FDM/PFCCS program.

Procedures for offering an FCCS/FDM/PFCCS course are documented in the administrative binder materials that accompany course license purchase. These procedures include:

- Required faculty and their credentials
- Required and optional course content
- Processes and materials for course conduct

Translation Policy: Guidelines, Course Materials, Publications

Approved 9/12/98, amended by Council 9/10/11, amended by Council 5/6/17; revised 9/18 to include other translations including FCCS as originally written

SCCM occasionally receives requests to translate its guidelines, course materials, and publications. Translation of these materials supports the Society's mission and vision, making education, practice, and research more accessible worldwide. To further these goals and to provide protection to SCCM's intellectual property, this policy will regulate the need and process for translation.

Guidelines

SCCM allows translations of guidelines. Translations may be accomplished through 1) professional translation services or 2) via MOU with professional medical societies. The intention of this policy is to assure that the translations are accurate and safe for use at the bedside, and that copyright permissions are properly executed. The policy protects authors who have approved only the original manuscript and may not have the opportunity nor are able to evaluate the accuracy of any individual translations. Individual persons are not permitted to circulate policy non-compliant translated SCCM guidelines. Translated guidelines will be posted and links provided where possible via CCM and PCCM journals. Budgets for translations may be required and as such must follow the SCCM budgeting process which may include strategic planning proposals. If a request is received to translate an SCCM guideline that was developed under an MOU with an external organization, the terms of that MOU must be reviewed and followed. The external organization should have the opportunity to review and approve the translation of the guideline.

Course Materials (Fundamentals and Licensed Courses)

Translation Requirements
- If it is determined that translation must occur to make education, practice, and/or research accessible to healthcare professionals in a designated region, SCCM allows translation of course materials in adherence to the policy stated here.
- It must be determined that a minimum of fifteen hundred (1,500) textbooks of a translation will be used over a three (3) year period. If Model A (Licensing Agreement) or Model D (Sponsored Agreement) is selected, there is no required minimum.
- If translation is requested or supported by an organized critical care society, that society will direct translation efforts until the project is completed.
- If translation is requested by SCCM members in a country that does not have an organized critical care society, SCCM will arrange for translation, printing, and/or distribution of course materials.
- All translations must occur under contract, which will be negotiated and signed by the SCCM CEO/EVP. These contracts, or translation agreements, must be strictly adhered to.

Translation Process
- Translation agreements and contracts will be structured according Model A, B, C, or D (described below). If a different translation model is requested, the arrangement must be approved by the SCCM CEO/EVP.
- If Model A is selected, the national critical care society will select healthcare professionals to translate course materials.
- Changes in measurements and text (beyond actual translation) will need approval from the appropriate committee leadership.
- SCCM and program names and logos must be present on all translated materials.

- International copyright law must be practiced and adhered to. SCCM will retain copyright ownership of translated materials.
- SCCM will provide illustrations, text in electronic form, hard copy, and cover design files to accomplish translation.
- SCCM will review and approve all translated materials prior to printing.
- Upon completion, the final version of all translated materials must be sent to SCCM.
- Upon completion, SCCM have the option to purchase translated copies of the textbook at cost.
- For the term of the contract, the publisher or licensee must send regular accounting of printed and distributed textbooks to SCCM.

Translation Models

Model A (Licensing Agreement)

An organized critical care society (the Licensee) translates a book (and related materials) under license from SCCM, with the intention of selling that book in a designated region. The Licensee will incur all costs to translate, produce, print, warehouse, sell, and ship the product at no cost to SCCM. The Licensee will identify a publisher and distributor in the country, and 10% to 15% royalties on published copies are paid to SCCM per the contract. Accounting of texts printed is given to SCCM at the time of printing. The Licensee should note the restrictions regarding bulk and individual purchases. When the books are used as part of a training program, a license to operate that training program is required and is purchased by the training institution directly from SCCM. In this instance, the books are purchased in bulk at specially arranged prices, but only after a license to operate the course has been secured by the training institution. Typically, books sold in bulk for use in conjunction with a licensed training course are sold at a discounted rate when compared to the suggested retail prices.

Model B (Production Agreement)

At SCCM's direction, a company is contracted to translate, produce, print, warehouse, and ship the product for distribution in a designated region. Shipment of the translated book will be made at SCCM's request. All orders are processed directly by SCCM. SCCM will incur all costs of production, translation, and storage, and no royalties will be made to any other party. This option is contingent upon SCCM securing agreements with local hospitals or other training institutions to purchase fifteen hundred (1,500) copies of the translated books within a three (3) year period.

Model C (License and Production Agreement)

SCCM incurs all the costs to translate, produce, print, warehouse, and ship an SCCM product for distribution in a designated region. Shipment of the translated book for SCCM courses will be made at SCCM's request. There will be no royalty paid to the company for licensed bulk sales used in conjunction with training courses (per Model A – Licensing Agreement). The company is authorized to make only individual sales (quantities of five [5] or fewer books per order in a single year). Should there be individual sales of the book, SCCM will pay a royalty to the company, and the gross revenue from the sale will accrue to SCCM. This option is contingent upon SCCM securing agreements with local hospitals or other training institutions to purchase fifteen hundred (1,500) copies of the translated books within a three (3) year period.

Model D (Sponsored Agreement)

A sponsor is secured to pay for the production costs and SCCM license fees for the product. Sponsors are typically large hospital networks or pharmaceutical or medical device companies. SCCM provides a license for distribution of the product in a designated region. SCCM receives a one-time payment up front and the translation/production companies' costs are all paid by the sponsor. In addition to translation, production, and printing, the company also warehouses and ships the product in the designated region as authorized by SCCM.

Industry Grants and Sponsorship for Translations

Industry grants may be sought through SCCM development activities or through each participating country's resources on a case-by-case basis. Through a Sponsored Agreement (Model D), industry grant support may help underwrite the cost of producing translated materials, expenses associated with translation, travel expenses for translators, product improvement, mailing, SCCM administration, and legal fees. SCCM Executive Committee must approve all agreements granting industry acknowledgement in the course materials. Terms will be specified in the translation contract.

Books

SCCM allows translation of book publications that are not sold as part of an SCCM course (non-course book). A publisher or an organized critical care society (the Licensee) may request to translate a non-course book under license from SCCM, with the intention of selling it in a designated region. The Licensee will incur all costs to translate, produce, print, warehouse, sell, and ship the product at no cost to SCCM. The Licensee will identify a publisher and distributor in the country, and 10% to 15% royalties on published copies are paid to SCCM per the contract. Accounting of texts printed is given to SCCM at the time of printing.