

## **POLICY STATEMENT**

### **Relationships with Other Organizations**

A primary goal of the American Academy of Ophthalmology is to provide continuing medical education (CME) to enhance the ophthalmologist's ability to furnish the highest possible quality of eye care for patients. Therefore, relationships with other organizations must not jeopardize the Academy's standing as a respected organization.

#### **Policy**

When appropriate and desirable, the American Academy of Ophthalmology may solicit or accept financial or other support from both for-profit and not-for-profit organizations in order to develop and/or improve activities and programs that are consistent with the Academy's mission statement. All arrangements for financial or other support must fall within the guidelines of this policy statement or be reviewed by the Board of Trustees or the Executive Committee acting on behalf of the Board of Trustees. Support for all CME programs and activities must adhere to the *Standards for Commercial Support of Continuing Medical Education* of the Accreditation Council for Continuing Medical Education (ACCME). In addition, with respect to gifts to physicians and the conflicts inherent in such gifts, the Board of Trustees has adopted the American Medical Association's (AMA) guidelines as outlined in its publication entitled *Gifts to Physicians from Industry*.

#### **Background**

Financial and other support from corporations, foundations, and other organizations can contribute significantly to both the quality and scope of Academy programs, activities, and services. The Academy shares many common goals with other organizations, including corporations in ophthalmic industry, and it is appropriate for the Academy to cultivate and maintain appropriate and ethical relationships with these organizations. Such relationships must not pose conflicts of interest for the Academy, its officers, staff, members, or the sponsoring organizations, and they must be consistent with the goals and objectives of the Academy's strategic plan.

#### **Definitions**

The Academy may enter into different types of relationships or arrangements with other organizations as defined below.

**Sponsorship:** A financial donation to the Academy to support an Academy product or service with appropriate recognition for the donor.

**Joint Sponsorship:** A joint effort in which both (or all) organizations or institutions are integrally involved in planning and developing an Academy program.

**Joint Sponsorship for CME:** The ACCME accredits the Academy to provide CME to physicians. The ACCME publication *Essentials and Standards* includes definitions and requirements specific to the joint sponsorship of CME. These are supported by the Academy's *Guidelines for Joint Sponsorship of Continuing Medical Education Activities*. All joint-sponsorship CME efforts must conform to these ACCME requirements and Academy guidelines.

**Cooperative Relationship:** A relationship in which the degree of involvement of one organization or institution in the planning, developing, or implementing of a

program or service is less than that of the primary sponsoring organization or institution. The terms "in cooperation with" or "cooperating organizations" are used to describe such relationships.

**Endorsement:** Approval by the Academy of, or the loan of the Academy name to, a program or service developed by another organization. Endorsements must be approved by the Board of Trustees.

**Alliance or Collaboration:** A joint effort of two entities that benefit from sharing profit, cost-savings, service, royalties, license, or name recognition.

### Guidelines

1. In general, the Academy will proactively choose its priorities for entering into relationships and arrangements with other organizations; however, the Academy will also consider opportunities presented by other organizations.
2. All proposed arrangements and relationships must fit the guidelines outlined here or be reviewed by the Academy Board of Trustees or the Executive Committee acting on behalf of the Board of Trustees, in order to ensure that acceptance of funds or use of Academy funds would not have a negative influence on Academy programs or policy or be inconsistent with the Academy's mission and goals.
3. Proposed arrangements and relationships must not compromise the Academy's reputation, the privacy of its members, the existence or identity of the Academy, its tax status, or its trademarks.
4. Participation in a specific arrangement or relationship does not in any way imply Academy approval of an organization's general policies, nor does it imply that the Academy will exert any influence to advance the organization's interests outside the substance of the arrangement itself. The Academy's name and logo may not be used in a manner that would express or imply Academy endorsement of the organization or its policies.
5. The Academy accepts funds or royalties only if acceptance does not pose a conflict of interest and in no way impacts the objectivity of the Academy, its members, officers, or employees. If sponsorship funds are supplying all or part of an employee or independent contractor's compensation, each such employee or independent contractor must disclose any financial or fiduciary relationship with the sponsoring organization. This disclosure includes loans, gifts, or income from the organization; investments of \$2000 or more in the organization; and any position with the organization, such as a director, officer, partner, consultant, trustee, or employee.
6. The Academy does not endorse or certify health or medical products or medical services produced by other companies and marketed to consumers. In no case will the Academy's name or logo be used to promote or endorse a medical product for consumers produced by others without approval of the Board of Trustees.
7. The Academy does not endorse programs developed by other organizations or institutions, except as determined by the Board of Trustees.
8. The Academy does not actively seek endorsements of Academy programs or services from other organizations or institutions except as determined by the Board of Trustees.
9. In accordance with ACCME standards, the Academy will conduct all CME programs

independently and without influence of or control by other supporting organizations. Supporting organizations shall not influence or control the program planning, program content, or execution of the activity; the program must be free of commercial bias for or against any product; and any product discussion must be objective, balanced, and scientifically rigorous. Corporate sponsors may not engage in promotional activities in the CME program location or in the CME materials, and no promotional materials may be disseminated during the CME activities. Since the Annual Meeting printed programs are not designated as CME activities, corporate advertising will be permitted in the printed programs.

10. In accordance with the AMA's guidelines outlined in *Gifts to Physicians from Industry* (adopted and approved by the Academy's Board of Trustees) and the *ACCME Standards for Commercial Support for Continuing Medical Education* (an element of the Academy's accreditation to provide CME), funding from industry to underwrite the costs of CME conferences or professional meetings should be made to the Academy and not to individual physicians. Subsidies from industry should not be accepted to pay for the costs of travel, lodging, or other personal expenses of the physicians who are attending CME conferences or meetings. Subsidies for hospitality should not be accepted except for modest meals or social events that are held as part of a CME conference or meeting. Industry support for the costs of travel and lodging for attendees who might otherwise not be able to participate in an Academy event (e.g., ophthalmologists from countries or regions with developing economies) may in certain circumstances be considered appropriate; such situations will be addressed on a case-by-case basis.
11. Organizations that provide financial support to the Academy may be recognized. Such corporate or foundation recognition regularly occurs in Academy publications and other appropriate forums. Recognition does not include any reference to the organization's products. The institutional acknowledgment may state the name, mission, and areas of clinical involvement of the company or institution, and it may include corporate logos and slogans if they do not promote the product.
12. The Academy retains editorial control over any information produced as part of relationships or arrangements with other organizations. All intellectual property resulting from sponsorship by another organization will be the property of the Academy unless the Board of Trustees has approved an agreement to the contrary. In every case, all materials in print, broadcast, or electronic media prepared by the supporting organization must be submitted to the Academy for written approval prior to release.
13. In addition to normal reviews as needed by legal counsel, the chief financial officer and the appropriate divisional vice president, the executive vice president shall be responsible for ensuring that arrangements and relationships with other organizations adhere to the guidelines adopted by the Board of Trustees.

Approved by:	Board of Trustees, June 1998
Revised and Approved by:	Board of Trustees, April 1999
Revised and Approved by:	Board of Trustees, February 2003
Revised and Approved by:	Board of Trustees, February 2007