

Canadian Association for the Study of the Liver

Endorsement Policy

1. Purpose:

- The purpose of this CASL policy is to define the criteria and the process that will be followed for requests from outside organizations, agencies, groups or individuals (the Requestors) for endorsement of their activities/events by CASL. Such requests may include but are not limited to position statements, clinical practice guidelines, CME events, scientific meetings and proceedings thereof, and research activities (the "Subject of Request"). The aim of this policy is to make the process of endorsing the Subjects of Request as transparent and objective as possible.
- Content development and conduct of CASL, CLF, and CIHR's activities/events (including, but not limited to, CDDW and the CASL Winter meeting, CASL consensus conferences, other stand-alone CASL meetings, CASL clinical practice guidelines, and grant competitions) are beyond the scope of this policy.

2. Definitions used in this document:

- **CASL** -- Canadian Association for the Study of the Liver
- **The Requestor** - any organization, agency, group or individual other than CASL approaching CASL with a request for endorsement
- **The Subject of Request** - any publication or event of a Requestor including, but not limited to, position statements, clinical practice guidelines, CME events, scientific meetings and proceedings thereof, as well as research activities
- **Endorsement** - a written statement officially issued by CASL recommending the Subject of Request in its entirety i.e. its intent, content and conduct.
- **Support** - CASL bringing the Subject of Request to the attention of its membership without official endorsement.

3. Criteria:

a) CASL Support:

A Subject of Request will be considered for CASL Support only when ALL of the following criteria are met:

- The Subject of Request must be consistent with CASL's vision, mission, goals, and standards
- The Subject of Request must be produced by a not-for-profit organization or agency. CASL does not endorse or support any commercial diagnostic or therapeutic products including, but not limited to, diagnostic tests, drugs (including herbal therapies), foods/nutritional supplements, equipment or procedures.
- The Request for Support must list all parties responsible for the content and conduct, of the Subject of Request. Any and all sources of funding must be explicitly stated. All potential conflicts of interest must be declared.

- The Request for Support must be made by the non-for-profit organization(s) or agency(ies) responsible for the Subject of Request.
- From the time the Request (with all documents detailed below) is received by the CASL office, the Requestor will allow at least 60 working days for CASL's decision making.

b) CASL Endorsement

A Subject of Request will be considered for Endorsement only when ALL of the following additional criteria beyond those detailed above for CASL Support are fulfilled:

- CASL must be involved in the planning of content and conduct of the Subject of Request at an early stage.
- The Request for Endorsement (with all documents detailed below) has to be received by the CASL office at least 90 days prior to the Subject of Request taking place

4. Process:

a) Submission of Request for Support or Endorsement:

Requests for Support or Endorsement must be submitted electronically to the CASL office, as per the timelines detailed above, with the following documentation:

- Name, affiliation and contacts of the Requestor
- Relationship of the Requestor to the organization/agency responsible for the Subject of Request
- Conflict of interest statement of the Requestor
- The complete set of final documents on the Subject of Request that will include the following:
 - A list of organizers/experts responsible for content and conduct, including a declaration of potential conflicts of interest
 - other involved content experts such as speakers/writers, including a declaration of their potential conflicts of interest
 - detailed program/description/content of the Subject of Request
 - target audience
 - funding sources
- A Cheque for a non-refundable processing fee of CAD 200 payable to CASL (waived for CASL members)
- (NOTE: the above mentioned time lines will start only once all of the required documentation has been received).

b) Decision making by CASL:

- Once a Request for Endorsement or Support is received, the CASL office will determine the completeness of the submitted documentation. CASL can request additional information from the Requestor, if necessary. Once all of the required documentation has been received to the satisfaction of CASL, the CASL office will send the complete file on the Subject of Request to the CASL President and President elect.
- The CASL President (or in his absence, the President elect) will review all of the documentation submitted by the Requestor and decide whether the Subject of Request falls within CASL's vision, mission, goals, and standards, as well as within the scope of this policy document.
 - If not, the CASL President will instruct the CASL office to prepare and send a response letter to the Requestor with notification of this decision. If the Requestor disagrees, he/she may appeal the decision by re-submitting the required documentation accompanied by a rebuttal letter detailing the reasons for disagreeing.
 - If so (and in any case of an appeal), the CASL President will instruct the CASL office to have the Request for Support or Endorsement placed on the agenda for the next CASL EXEC TC.
- The CASL office will then send all documentation on the Subject of Request to all members of the CASL EXEC for their review.
- At the CASL EXEC TC, the CASL EXEC will decide on the Subject of Request by majority vote of those present. In case of a draw, the vote of the CASL President (or in his absence, the President elect) decides. The decision by the CASL EXEC is final and cannot be appealed.
- The CASL office will then prepare a response letter with notification of this decision, has it signed by the CASL president (or in his absence, the President elect) and sent it to the Requestor together with a request to complete the additional steps outlined below.

c) Additional steps required to complete an approved Request for Support:

Once a Request for Support has been approved by the CASL EXEC,

- The CASL EXEC will decide at the same EXEC TC on the most appropriate way of bringing the Subject of Request to the attention of its members (e.g. posting on Website, extra E-mail blast, including in next scheduled E-mail blast).
- The CASL office must add the following disclaimer to its communication on the Entity to its membership:

"The Canadian Association for the Study of the Liver (CASL) has made every effort to ensure that information included within this [Subject of Request] is accurate at the time of this communication. The information included cannot substitute for the advice or direction of a health care professional, and CASL makes no guarantees, nor can it assume any legal liability for the accuracy, completeness, or usefulness of such information or for any damage incurred directly or indirectly from the information."

Reference to any specific product does not imply its endorsement, recommendation or preference by CASL”.

- Should a CASL Supported Subject of Request be posted on the CASL website, it is at the sole discretion of CASL whether and when to take it off its website again without any obligation to give (a) reason(s) or to notify the Requestor.
- All the above is communicated with the decision letter to the Requestor asking for approval.
- The CASL office will only communicate the Subject of Request to its membership once the approval to all the above has been received in writing from the Requestor.

d) **Additional steps required to complete an approved Request for Endorsement:**

Once a request for Endorsement has been approved by the CASL EXEC,

- A written contractual agreement between CASL and the organization/agency responsible for the Subject of Request is required.
- This contractual agreement shall define the details of execution of the Endorsement and shall minimally state the following:
 - CASL shall provide the Requestor with an endorsement in the form of a written statement recommending the Subject of Request. The following is an example of such a statement:

“This [Subject of Request] is consistent with the vision, mission, goals and policies of the Canadian Association for the Study of the Liver (CASL)”.
 - A disclaimer must appear on all written material, protecting CASL from legal liability in the misinterpretation of content of the Subject of Request. The following statement shall appear on all materials regarding the Subject of Request for which CASL is providing endorsement:

“The Canadian Association for the Study of the Liver (CASL) has made every effort to ensure that information included within this [Subject of Request] is accurate. The information included cannot substitute for the advice or direction of other experts and health care professionals, and CASL makes no guarantees, nor can it assume any legal liability for the accuracy, completeness, or usefulness of such information or for any damage incurred directly or indirectly from the information. Reference to any specific product does not imply its endorsement, recommendation or preference by CASL”.

- The use of the CASL logo on any material relating to the Subject of Request must be approved by the CASL EXEC for each instance.
- No alterations can be made to the CASL logo, supporting statements or disclaimer.
- All materials relating to the Subject of Request should be available in both official languages of Canada
- All materials relating to the Subject of Request should note the date of production/publication.

- The contractual agreement is to be signed for CASL by the CASL President and President elect, for the Requestor by two officers of the organization/agency responsible for the Subject of Request.
- The CASL EXEC shall decide on a non-refundable processing fee for this contractual agreement, to be paid to CASL prior to it taking effect.

5. Terms and Conditions

- This policy was finalized by the CASL EXEC on July 7, 2015 and approved by the CASL Board of Directors on November 14, 2015.
- This policy takes effect, as of the date of its approval and replaces any previous policies in this matter.
- The Board of Directors will review this policy annually and adapt it, as necessary.