



# **INTERNATIONAL JOINT POLICY COMMITTEE OF THE SOCIETIES OF EPIDEMIOLOGY**

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## **Policy on entities from whom financial contributions, contracts, and grants WILL and WILL NOT be sought/accepted, and how these will be disclosed**

***Part I: Guidelines for soliciting financial contributions, contracts or grants***

***Part II: Principles for guiding the IJPC-SE when considering any potential financial contribution, contract or grant***

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### ***PART I: Guidelines for soliciting financial contributions, contracts or grants***

#### **1. Introduction**

The International Joint Policy Committee of the Societies of Epidemiology (IJPC-SE) is a volunteer-driven not-for-profit consortium, comprising 19 national and international member-professional societies/associations as on May 22, 2015. It is governed by the most current version of its Founding By-laws accessible [here](#). Nothing that follows takes precedence over the IJPC-SE's Founding Bylaws or its most recent revisions.

The mission of the IJPC-SE is to impartially generate, report and apply epidemiological evidence to the formulation, implementation and evaluation of health policy. Under the umbrella of its member societies, the IJPC-SE's goal is to serve the public interest by informing health policy and related areas of endeavor through its work at the nexus of research and policy.

The IJPC-SE works to achieve its goals by coordinating inter-professional society activities that are related to research and practice in the generation of evidence, as well as in evidence-based policy application, formulation, implementation and evaluation. The specific activities of the IJPC-SE may include, but are not confined to transparently promoting epidemiological

best practices to inform policy.

To support its mission, the IJPC-SE, as a professional, volunteer-driven organization, is resolved to secure financial contributions and to establish an ongoing revenue base from donations, in-kind contributions, endowments, contracts and grants, generally from external sources rather than to rely on membership dues. In this *two-part* policy document, we:

- 1) articulate the IJPC-SE's overarching values, expectations, approaches, and definitions of terms to use for determining which revenue streams to accept and to not accept;
- 2) describe the IJPC-SE's general requirements, operating principles and guidelines, including criteria for the IJPC-SE's review of any sought after or proposed donations, contracts, grants, gifts, and other external support; and
- 3) provide answers to common questions to guide potential donors, contractors and grantors (institutional and private) and the IJPC-SE when planning to make donations or grants available to the IJPC-SE.

Throughout this document, two types of financial contributions will be sought as one-time and ongoing revenue for the IJPC-SE. The **first** term “**financial contribution**” is defined to include donations of gifts (including printers, computers, fax machines, access to telephone lines, hard durable and perishable goods, travel vouchers), in-kind and other funding support from public or private entities, and endowment funds. The **second** term “**contracts and grants**”, directed or competitive, relates to public interest institutions such as local, regional, national, international and philanthropic entities.

## 2. Benefits of Financial Support and Sponsorships

All forms of revenue can be used to advance the mission of the IJPC-SE to support the profession of epidemiology in using unbiased, objective epidemiological evidence at the nexus of research and policy. As such, the IJPC-SE engages formal dialogues in various formats and forums to bridge research to policy in the public interest. Through these and related activities, the IJPC-SE serves to advance the science of epidemiology, always striving to protect the public interest above other interests.

Of particular importance for our potential donors, the IJPC-SE's role is to be vigilant in: 1) providing assurance that evidence cannot be inappropriately manipulated to defend special interests; and 2) working to counter the influence of special interests.

Finally, the IJPC-SE will publicly acknowledge its gratitude for the support from and recognition of its generous contributors, whether they be a for-profit or non-profit corporate/business/other entity, or an individual. The level of funding provided to the IJPC-SE from one-time and/or from sustaining donors will be presented in its annual financial reports and posted to the IJPC-SE's official website and social media webpages.

The level of donations in financial-equivalent terms are recognized and honored as follows:

**Tier Recognition Levels for all Donors, whether "Individual/Personal" or "Societies, Foundations, Organizations and Corporate Sponsors":**

<b>AMBASSADOR EXTRAORDINAIRE</b>	<b>US \$50,000 and more</b>
<b>GRAND AMBASSADOR</b>	<b>US \$25,000 – \$49,999</b>
<b>AMBASSADOR</b>	<b>US \$10,000 – \$24,999</b>
<b>GRAND PATRON</b>	<b>US \$ 5,000 – \$ 9,999</b>
<b>PATRON</b>	<b>US \$ 2,500 – \$ 4,999</b>
<b>CHAMPION</b>	<b>US \$ 1,000 – \$ 2,499</b>
<b>GRAND BENEFACTOR</b>	<b>US \$ 500 – \$ 999</b>
<b>BENEFACTOR</b>	<b>US \$ 100 – \$ 499</b>
<b>DONOR</b>	<b>US \$ 10 – \$ 99</b>

**SUSTAINING CONTRIBUTORS** at the aforementioned levels are those who commit to providing the same level of support on a periodic basis.

**ENDOWMENTS** will be reflected individually.

**CONTRACTS AND GRANTS** will be reflected individually.

See **APPENDIX I, Principles for Financial Contributor, Contractor or Grantor Recognition.**

### **3. Integrity, Independence, and Objectivity**

The work of the IJPC-SE must be conducted independently, objectively, and free from bias by any professional, financial or personal interests, or of any commercial or political interests. Activities of the IJPC-SE must be transparent and based on the best available evidence. As such, the IJPC-SE is required to have a disclosure process to identify and resolve any conflict-of-interest before donor support is applied for and/or accepted. The process includes the submission and review of applications for proposed contributions of funding, which includes the written disclosure of any actual or perceived conflict-of-interest. In practice, a conflict-of-interest could arise when a contribution or a sponsorship could be perceived to be used to wield influence and negatively impact the objectivity of any work product of the IJPC-SE; the need to ensure impartiality in the work of the IJPC-SE trumps all considerations (see **Part II: Principles for guiding the IJPC-SE when considering any potential financial contribution, contract or grant**).

## ***Part II: Principles for guiding the IJPC-SE when considering any potential financial contribution, contract or grant***

The following three aspects relating to any potential financial contributor or sponsor must be considered by the IJPC-SE Executive Committee and the Board at the earliest possible stage:

### **1. Conflict-of-Interest: Definitions, Disclosures and Review; Entities from which Funding is not Acceptable**

A conflict-of-interest is an affiliation or relationship, usually of a financial nature or professional and/or personal nature, with a commercial interest, organization or entity whose financial or other relationship with the IJPC-SE could influence or be perceived to influence the impartiality of the Board in its decision-making in a manner that could advance the interests of the funding or other entity for reasons other than scientific or the public good. Such a relationship constitutes a conflict-of-interest because it might bias an IJPC-SE Board member's ability to objectively participate in decisions before the Board.

A conflict-of-interest may be actual or perceived. If a reasonable person might perceive a conflict-of-interest, then a conflict-of-interest exists. If there is potential for a perceived conflict-of-interest, then it must be treated the same as if a conflict-of-interest actually exists.

Prior to accepting of any financial contribution, contract or grant, the IJPC-SE Executive Committee will review each unsolicited offer of or direct application proposal for support for any actual or a potentially perceived conflict-of-interest. The five types of relationship that may constitute a conflict-of-interest are described in **Appendix II**.

Disclosures of conflict-of-interest are required. The disclosure form requires disclosures of any financial, professional or personal conflict and requires a signature agreeing to follow the IJPC-SE policies and suggestions that may resolve the conflict(s). The process includes transparency and disclosure which requires posting to the IJPC-SE website.

Entities that generally do not have direct or indirect commercial interests are non-profit and government entities.

Public health-impacting companies/foundations include those that are in the business of commerce around, for instance, tobacco or any product like armaments and polluting chemicals that cause harm. Therefore, **donations will not be accepted** from public health-impacting entities that cause harm including tobacco companies, alcohol companies, manufacturers of firearms and weapons of mass destruction, and from any other corporations involved in the manufacture, sales or distribution of chemicals, products (raw and/or finished), or equipment that can be used for weapons of mass destruction, large-scale agricultural applications such as pesticides, herbicides, biological or chemical adulterants, or substances known to be harmful to the environment, animals, and humankind in general.

Also, **donations will not be accepted** from individuals and other entities that are or may be perceived as directly or indirectly involved with violating, denying or impeding any human right as defined by the United Nations Declaration of Human Rights (UNDHR, 1948) and any related human rights instruments.

The IJPC-SE also **will not accept donations** from foundations and non-profit entities that demonstrate a lack of ethical standards brought to attention, in particular, by reputable public interest agencies and so deemed by the Executive Committee. In particular, the IJPC-SE Executive Committee will consider as unethical any conduct that is shown to be in contravention of the normative ethical standards of any of the IJPC-SE member-societies or of the UNDHR and related human rights instruments. In instances where such information manifests after the fact, the IJPC-SE will, wherever possible, return the donation. If the donation cannot be returned, a clear explanation will be posted to the IJPC-SE website's donor page and no future funding will be accepted from such an entity. Careful vetting will be applied to minimize the likelihood of any such potential refunds.

See further discussion in **APPENDIX III: Principles for Accepting Financial Contributions from Commercial or Other Entities Marketing or Promoting Products or Services.**

## **2. Commercial Sponsors**

Commercial support is defined as a donation provided by a commercial interest entity, which is to pay for some or all of the costs of a particular aspect of any IJPC-SE activity.

The IJPC-SE will accept commercial support for learning institutes, scientific sessions, roundtables or the like, in accordance with the [Accreditation Council for Continuing Medical Education Standards of Commercial Support](#) and the

[American Nurses Credentialing Center Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities.](#)

## **3. Philanthropic Foundation Sponsorship/Support**

Philanthropic Foundation sponsorship/support is a donation from an organization when the organization does not fit the category of a commercial interest entity.

When the IJPC-SE joins with another entity and the other entity donates to the IJPC-SE, then the relationship becomes a sponsorship.

The IJPC-SE is the provider and the other organization is called the sponsor.

Any donation that is given to the IJPC-SE must be documented. All such contributions to the IJPC-SE must be processed by the IJPC-SE and, for contributions worth any amount, a sponsorship disclosure notice must also be submitted, reviewed and posted on the IJPC-SE website.

Interested donors are encouraged to contact the IJPC-SE regarding requirements for soliciting contributions. Likewise, IJPC-SE members, officers and affiliate organizations that know of interested donors are encouraged to help organizations more easily navigate the IJPC-SE's processes for donating to the IJPC-SE.

At the time of developing this policy in May 2015, the IJPC-SE is on track to be recognized as a 501(c)(3) Non-Profit Organization in the US sometime in 2015.

The IJPC-SE will accept donations not only from outside entities (including philanthropic foundations), but also from its member societies. However, as stated in section 4, paragraph 6 (top of page 4), there are some entities from which the IJPC-SE will not accept donations.

## **Specific Guidelines for Accepting Financial Contributions, Contracts or Grants**

### **I. INTRODUCTION**

To guide the IJPC-SE in securing outside support, “*Principles for Accepting Financial Contributions from Commercial or Other Entities Marketing or Promoting Products or Services*” (APPENDIX III) were developed. The principles are intended to guide the IJPC-SE's collaboration with the private sector.

To strengthen implementation, the guidelines herein describe specific criteria as well as a review and oversight process for evaluating potential donors and their proposed donations. The guidelines, in conjunction with the principles, are intended to protect the mission and integrity of the IJPC-SE while supporting its fundraising efforts. Overall, the purpose of IJPC-SE's review is to determine the balance of the benefit to the public in relation to the risks and costs of collaborating with the funding organization.

**The following considerations** were used as these guidelines were developed:

- The IJPC-SE is a non-profit, non-partisan consortium of national and international non-profit professional member societies.
- The IJPC-SE's approaches to donors are seen as opportunities to build mutual relationships with and support from future collaborators for effective uses of evidence to advance the public's health over the long-term.
- The criteria for review of potential donations should be reasonable and realistic.
- The review and oversight process for potential financial contributions should not be overly cumbersome.
- Over time, the review process will build a body of knowledge for accepting and soliciting donations.
- These guidelines will be reassessed and modified so as to assure their most practical and effective uses after the first year of implementation and periodically thereafter as necessary. Reassessments will take into consideration the IJPC-SE's experience of applying the guidelines. It is expected that methods for a more effective review and/or gaps in the criteria

or the review process will be identified. These guidelines apply to all donations received by the IJPC-SE from Philanthropic Foundations, Corporations and/or corporate foundations, solicited or unsolicited, including gifts and in-kind contributions received from member societies.

## **II. OVERARCHING CONSIDERATIONS**

**Three** overarching considerations will shape IJPC-SE's acceptance of all donations, contracts or grants. They are:

- The IJPC-SE will solicit and accept donations, contracts or grants for projects and activities that are consistent with its mission. Donations, contracts or grants may be earmarked for specific IJPC-SE activities, including its day-today operations.
- Acceptance of donations, contracts or grants must enhance, and shall not impede, the IJPC-SE's ability to act in the best interests of the public.
- The IJPC-SE's name, logo and other intangible intellectual assets must be protected in the context of acknowledgement.

## **III. PROCESS FOR REVIEWING PROPOSED DONATIONS, CONTRACTS AND GRANTS AND OTHER EXTERNAL SUPPORT**

Overall, the purpose of IJPC-SE's review is to weigh the benefit to the public good through facilitating the exercise of the IJPC-SE's mission against any risks and costs of accepting donations, contracts or grants and/or collaborating with any funding organization. The major determining factors for the level of evaluation needed for proposed donations, contracts or grants will be:

- 1) the total amount or value of the donation, contract or grant or pledge for financial support;
- 2) the purpose of the proposed donation, contract or grant, be it for general funding of the IJPC-SE, or for specific collaborative efforts, projects or purposes; and
- 3) from which individual, organization or other entity providing the funding, except for individual donations below a lower threshold-value set by the IJPC-SE Board. All donations from individuals or other entities will be reviewed by the IJPC-SE Chair or his/her designee, who will identify any high-profile restricted donation that requires full Executive Committee review.

For individual donations valued under the Board's set threshold amount, the IJPC-SE Chair or his/her designee is authorized to determine whether the IJPC-SE will accept the offer.

Irrespective of the dollar amount or value of a proposed donation, the IJPC-SE Executive Committee is required to review applications involving donations, contracts or grants from any "high profile" corporation or corporate foundation that requires IJPC-SE-wide or even wider recognition as a criterion for making a donation, such as the sponsorship of the opening plenary session of a major conference/congress, sponsor identification on the conference/congress bags, or awards named after corporate donors, or other public recognition by the IJPC-SE in national or international settings (e.g., interviews or announcements involving the national or international

press) or other conferences.

- All financial contributors, particularly those from the corporate sector, making donations of any amount must comply with the IJPC-SE's *Principles for Accepting Financial Contributions from Commercial or Other Entities Marketing or Promoting Products or Services* and the criteria as stated in these Guidelines (**see APPENDIX III**).
- All donations received in support of the IJPC-SE will be reviewed by the Executive Committee for donor adherence to the criteria as stated in these guidelines. The Executive Committee will report its findings periodically to the Board.
- The Executive Committee will make a recommendation to the Board on: whether to accept donor's applications and receive proposed support; whether to continue to accept donations over time; or, whether to accept a re-submission of an application with modifications for further consideration.
- The IJPC-SE Board has the final decision regarding whether the application is accepted and whether donors have adequately adhered to the guidelines, principles and any agreements for continuing to accept the donation if this support is provided over time.
- The IJPC-SE board or its Executive Committee, if authorized by the Board, reserves the right to revoke any agreements to accept any donation with due cause.
- All donations will generally be considered unrestricted. Where a donor wishes to restrict the use of their donation, the Executive Committee will negotiate a mutual, written agreement with the donor entity and request that the Board ratify both the application for donations and the agreement reached relating to any restricted uses of the donation.
- Any decision may be appealed. Appeals will be considered by the Chair who will make a recommendation to the Executive Committee. The Executive Committee will, in turn, make a recommendation to the Board. The decision of the Board will be final.

#### **IV. FREQUENTLY ASKED QUESTIONS AND SPECIFIC GUIDANCE FOR THE REVIEW OF A PROPOSED DONATION, CONTRACT OR GRANT**

Overall, the purpose of IJPC-SE's review is to weigh the benefit to the public good through facilitating the exercise of the IJPC-SE's mission against any risks and costs of accepting donations, contracts or grants and/or collaborating with any funding organization.. On a case-by-case basis, the following questions should be answered in determining the benefits and risks of accepting a donation, a contract or a grant from either a corporation, business, philanthropic foundation, or IJPC-SE member society.

##### **A. Are the specified proposed uses of the donation, contract or grant congruent with the mission and priorities of the IJPC-SE?**

→ *Specific questions to consider* in determining this congruence include:

- How do the proposed uses of the donation, contract or grant relate to the IJPC-SE's goals and mission?
- Why does the organization want to make a donation to the IJPC-SE?
- How will the benefits to be derived from the intended purpose of the donation, contract or grant compare with the IJPC-SE resources required to fulfill the intended purpose?



- Do the practices of the corporation/foundation fit with the adopted public policies of the IJPC-SE? Recognizing that socially responsible practices are a cornerstone of the IJPC-SE's policies, and that good corporate citizenship should embody socially responsible practices, the following are among the types of issues that may be considered in assessing the benefits and the risks of accepting donations, contracts or grants from outside organizations, especially corporations:
  - a. The types of core products or services produced or provided;
 

*Note: In the event that the donor corporation is part of a corporate conglomerate with ties to organizations from which contributions will NOT be considered or accepted, as described above in section 4 at the top of page 4, the donor corporation as well as the relationship between the donor corporation and the conglomerate would be reviewed and donations from them would likely not be acceptable under this policy.*
  - b. Occupational health and safety conditions under which products or services are produced;
  - c. Employment practices and employee experiences, such including organizational commitment to diversity, a living wages, and fairness;
  - d. Commitment to protection of the environment;
  - e. Record of regulatory and responsible fiduciary compliance;
  - f. Marketing and advertising practices;
  - g. Research and development policy and practices;
  - h. Record of ethical conduct in respecting evidence-based scientific research;
  - i. Human rights record;
  - j. Donor's relevant public policy positions;
  - k. Record of support to public health organizations or public health-related issues and organizations;
  - l. Other past activities will be weighed in relation to the IJPC-SE's public policies and public reputation.

Within legal limits, the Executive Committee shall complete a discreet initial assessment (checklist form has yet to be developed) should any questionable practices, involvements, or ethical violations by any potential donating individual, entity or organization be identified or suspected from the record. The assessment will be based on available current knowledge, including web sites, a review of newspapers and contact with appropriate IJPC-SE member society leaders. The IJPC-SE members contacted will be held to a level of confidentiality as it relates to discussing the IJPC-SE's pursuit of potential donors until the information is made public. The Executive Committee is encouraged to seek the opinion of outside, knowledgeable, professionals and expert advisers.

**B. Are the financial contributor's expectations pertaining to control, oversight, and outcome(s) of the donation and/or project to which the funds are applied acceptable to the IJPC-SE?**

As stated in APPENDIX III, the IJPC-SE will accept funds only when the IJPC-SE has control of the content of the activity and when the IJPC-SE has and maintains complete control of all funds.

→ ***Specific questions to consider:***

- Does the IJPC-SE have editorial control over the content of educational materials and publications and input into their dissemination?
- Will the IJPC-SE be able to review and approve public statements about the project or service, its findings and/or implications? Will the IJPC-SE be in control of the funds at all times?
- Are expectations on outcome, responsibilities, methods of implementation, and duration of funding feasible and agreeable? (Any special expectations of the donor need to be explicit and documented).

**C. Are the donor's, contractor's or grantor's expectations regarding recognition or acknowledgment of their support acceptable to the IJPC-SE?**

Acknowledgments will generally be limited to company name, logos, slogans which are an established part of the supporter's identity, trade names, addresses and telephone numbers. While not allowing advertising or external endorsements of products or services, the IJPC-SE can consider tag lines that indicate a general support for public health and public health messages. Once approved, future donations from the same company using the same language do not need approval. If the requested language by the donor, contractor or grantor changes with future donations, the IJPC-SE Chair shall determine if a new Executive Committee review is required.

→ ***Specific questions to consider:***

- Is the extent to which the name of the corporation is affiliated with the IJPC-SE and the proposed project defined by the IJPC-SE acceptable to the donor, contractor or grantor?
- What public recognition is expected by the donor, contractor or grantor?
- Is the recognition appropriate for the amount of the donation, contract or grant?
- Is there an appearance of product endorsement? Where there is concern about possible perceptions, a tag line can be added that states, "*The appearance of the IJPC-SE logo does not imply endorsement,*" or similar language appropriate to the specific situation.

**D. Would accepting the donation, contract or grant create any real or apparent conflict-of-interest, and would the impact and/or benefits of accepting the donation, contract or grant outweigh the risks of partnering with the donor, contractor or grantor?**

In considering the following issues, the IJPC-SE recognizes the need to adhere to its principles by weighing the benefits and risks of accepting the donation, contract or grant from the funding entity against the option of not accepting the financial contribution.

→ ***Specific questions to consider:***

- Are there any personal, financial, or professional gains for IJPC-SE staff, members or other volunteers, which create a conflict-of-interest?
- What is the impact of the donation, contract or grant and benefits to the public and public health?
- Does the donor's, contractor's or grantor's image support or detract from the integrity or reputation of IJPC-SE or its ability to be scientifically objective and fair?
- Does the impact and/or benefit outweigh the risks of collaborating with the potential donor, contractor or grantor?

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## **APPENDIX I: Principles for Financial Contributor, Contractor or Grantor Recognition**

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- As noted in section 2 above under “Benefits of Donating to, Contracting with or Granting to the IJPC-SE”, donors, contractors and grantors and their level of support will be acknowledged on the IJPC-SE’s official website and social media webpages.
- As stated in the Principles for Accepting Donations from Commercial or Other Entities Marketing or Promoting Products or Services (**APPENDIX II below**), acknowledgments will generally be limited to company name, logos, slogans which are an established part of the supporter’s identity, trade names, addresses and telephone numbers. The IJPC-SE will not provide product endorsements. While not allowing advertising, the IJPC-SE can consider tag lines that indicate a general support for epidemiology, sound scientific research, and appropriately supported public policy.
- The following policies apply to recognition of donors in print and electronic media.
- The IJPC-SE’s name and/or logo should appear first and be of equal or larger size than the donor, contractor, or grantor.
- The IJPC-SE’s name and/or logo should be as visible as the donor’s, contractor’s or grantor’s name and/or logo.
- Donors, contractors or grantors should be listed alphabetically or alphabetically within financial amount ranges. It is suggested that variations on the below wording be used as an introductory statement to a list of donors, contractors or grantors:
- *“IJPC-SE gratefully acknowledges the support received for XYZ from the following contributors”*
- If exclusive recognition is to be given to a donor, contractor or grantor for example, the donor’s, contractor’s or grantor’s name is to be used in the naming of a program, activity or award, the Executive Committee must review and decide the use of the name.
- As stated above, the donor’s, contractor’s or grantor’s name should be used in conjunction with the IJPC-SE’s name and the IJPC-SE’s name should appear first.
- Other special recognition opportunities will be reviewed by the Executive Committee.

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## APPENDIX II: Five types of relationship that may constitute a conflict-of-interest

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The five types of relationship that may constitute a conflict-of-interest are categorized as follows and an individual may have more than one type at on any one occasion:

- A ***‘financial interest’*** may include but is not limited to a financial benefit that an individual who serves on the IJPC-SE Board receives from a third party. These benefits might include employment such as a wage or salary, self-employment, independent contractor, an intellectual property right that results in a royalty or other remuneration, consulting or speaking fee, teaching pay, honoraria, ownership interest (e.g., stocks, stock options, or other ownership interest, excluding diversified mutual funds), membership on an advisory committee, review panel, board, or other activity from which remuneration is received or expected.
- A ***‘business interest’*** may include any interest in a decision being taken by the IJPC-SE that could favour the business interests of the donor entity.
- A ***‘professional interest’*** may include but is not limited to a situation in which a donor entity provides support, but an individual on the IJPC-SE is directly or indirectly connected with the donor entity such that he/she is in a position to influence the results or outcomes of IJPC-SE deliberations. This applies equally to students in a formal relationship with the IJPC-SE.
- A ***‘personal interest’*** may include but is not limited to a financial relationship that is held by one’s spouse, partner or other family members or friends. Any of the three relationships noted above may also be a ‘personal interest’.
- A ***‘political interest’*** may include but is not limited to any interest in a decision being taken by the IJPC-SE that could favour the political interests or advancement of, contribute to the gain of political influence by, or has the potential to lead to policy decisions that mainly benefit the donor entity, its affiliate entity/entities, or the individual providing the donation or support rather than mainly benefiting the public or contributing to the community good

A conflict-of-interest must be disclosed while a conflict is present and for 36 months after it has ended.

Failure to disclose and to recuse oneself will disqualify one from future participation on the IJPC-SE Board for a period of at least three years. All IJPC-SE Board members have the obligation to recuse themselves from any discussion that could influence a decision associated with a Board member’s actual or perceived conflict-of-interest.

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## **APPENDIX III: Principles for Accepting Financial Contributions from Commercial or Other Entities Marketing or Promoting Products or Services**

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The IJPC-SE will focus on purposes consistent with its strategic priorities and comply with the following principles in soliciting all financial contributions; these principles will be discussed with all donors during the early stages of negotiation:

1. The IJPC-SE will at all times maintain an independent position on epidemiological issues and concerns.
2. The IJPC-SE will solicit and accept support only for projects and activities that are consistent with the IJPC-SE's Mission.
3. The IJPC-SE will accept funds for informational and educational activities only when the content is to be determined solely by or in collaboration with the IJPC-SE.
4. The IJPC-SE will maintain complete control of all funds provided from commercial supporters for its activities.
5. The IJPC-SE will not permit specific product endorsements, promotions or perception of such as part of its activities.
6. Acknowledgments for commercial support will be limited to company name, logos or slogans which are an "established part of the supporter's identity," trade names, addresses and telephone numbers. The IJPC-SE will not permit the use of corporate names or names of entities that market or promote products and services in naming future possible IJPC-SE awards.
7. The IJPC-SE's intangible intellectual assets, including its name and logo, will be protected at all times. Donors will not be permitted to use the IJPC-SE's name or logo for any commercial purpose or in connection with the promotion of any product.
8. The IJPC-SE will be vigilant at all times to avoid any real or perceived conflict-of-interest in accepting donations.
9. When the IJPC-SE is recognized as a non-profit, Federal Internal Revenue Service (IRS)-registered 501(c)(3) tax-exempt organization, the IJPC-SE also can provide written acknowledgement to donor entities that the IJPC-SE is a non-profit, Federal Internal Revenue Service (IRS)-registered 501(c)(3) tax-exempt organization as documentation.

Any situation that may be an exception to these principles will be reviewed by the Executive Committee. The Executive Committee will recommend a final course of action and which decision will be taken by a vote of the Board. The Board will have the final decision on any actions related to acceptance of donations.

## ACKNOWLEDGEMENT

In developing this IJPC-SE policy, the following three American Public Health Association-related documents were adapted to the needs of the IJPC-SE:

<http://www.apha.org/about-apha/centers-and-programs/center-for-professional-development-etc/apha-continuing-education-policies>

[http://www.apha.org/~media/files/pdf/about/csr\\_guidelines\\_for\\_gifts\\_2006.ashx](http://www.apha.org/~media/files/pdf/about/csr_guidelines_for_gifts_2006.ashx)

<http://www.apha.org/about-apha/centers-and-programs/center-for-professional-development-etc/apha-continuing-education-policies>