

SATELLITE SYMPOSIA PROSPECTUS – May 2008

2009 BMT Tandem Meetings

Tampa Convention Center, Tampa, FL - February 11-15

Opportunities for Satellite Symposia that offer:

- High-quality sessions unopposed by other scientific meetings
- Strong attendance by physicians and others active in the BMT field
 - Opportunities to host meal functions and receptions



ASBMT

American Society for Blood and Marrow Transplantation

The American Society for Blood and Marrow Transplantation (ASBMT) is a national professional association that promotes advancement in the field of cellular therapy and blood and bone marrow transplantation. The ASBMT Executive Office is located in Arlington Heights, Illinois. ASBMT members include approximately 1,500 clinicians and researchers. The scientific program chair for ASBMT is **James L. M. Ferrara, MD, MS**, University of Michigan Cancer Center, Ann Arbor, MI. More information can be found at www.asbmt.org.



CIBMTR

Center for International Blood & Marrow Transplant Research

The Center for International Blood and Marrow Transplant Research (CIBMTR) brings together the expertise and unique resources of two leaders in the field of blood and marrow transplant research: the National Marrow Donor Program® and the Medical College of Wisconsin's International Bone Marrow Transplant Registry and Autologous Blood and Marrow Transplant Registry (IBMTR/ABMTR). The Center is a voluntary research organization of basic and clinical scientists collaborating to address important issues in blood and marrow transplantation. Active in BMT research since 1972, the CIBMTR collects information on the results of blood and marrow transplants and uses this information to identify ways to improve transplant outcomes. Over 3,000 transplant physicians in approximately 450 transplant centers in 47 countries participate in the CIBMTR and have contributed information on more than 250,000 transplants. Scientific program chair for CIBMTR is **Mark R. Litzow, MD**, Mayo Clinic, Rochester, MN. More information can be found at www.cibmtr.org.



The Medical College of Wisconsin is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

BMT Tandem Meetings Overview

Annually, the BMT Tandem Meetings is the largest gathering in North America of worldwide experts in blood and marrow transplant patient care, clinical investigation and laboratory research. Satellite symposia are attended by nearly 2,000 physicians, scientists and allied health professionals working in blood and marrow transplantation in BMT programs throughout the United States, Canada and more than 50 other countries.

The *tandem meetings* approach has been successful since 1995 when the ASBMT and CIBMTR held their first joint annual meeting. Participants reap the benefits of attending the combined meetings in a single week with economics in travel and lodging costs, less disruption of professional schedules and the opportunity for interaction with a wider circle of colleagues. Registration for the 2009 BMT Tandem Meetings is open to members and non-members of ASBMT and/or CIBMTR. Meetings address timely issues in blood and marrow transplantation and recent developments from an experimental and clinical research perspective.

Continuing Education

The Medical College of Wisconsin (MCW) is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians. The Oncology Nursing Society and Syntaxx Communications provide credits for nurses and pharmacists, respectively, attending discipline-specific sessions. Certificates reflecting contact hours for attendance by allied health professionals are provided through the Medical College of Wisconsin.

Meeting Format

- SCIENTIFIC PLENARY & KEYNOTE SESSIONS
- SIMULTANEOUS SCIENTIFIC SESSIONS AND WORKSHOPS
- ORIGINAL POSTER AND ORAL PRESENTATIONS FOR SCIENTIFIC AND ALLIED HEALTH PROFESSIONALS
- WORKING COMMITTEE MEETINGS
- BMT CENTER MEDICAL DIRECTORS CONFERENCE
- BMT PHARMACISTS CONFERENCE
- TRANSPLANT NURSING CONFERENCE
- CLINICAL RESEARCH PROFESSIONALS DATA MANAGEMENT CONFERENCE
- BMT ADMINISTRATORS CONFERENCE
- BMT MEDICAL TRAINEES WORKSHOPS
- PEDIATRIC BMT EDUCATIONAL TRACK

Meeting Agenda and Exhibit Schedule

Exhibits at the 2009 BMT Tandem Meetings will be open for three, four or five days, from Wednesday, February 11, through Sunday, February 15. Five-day exhibit opportunities in highly visible pre-function space supporting heavy traffic are limited. Please contact Sherry L. Fisher at the CIBMTR Statistical Center at slfisher@mcw.edu for information about exhibiting.

More Information Available

Registration, Housing and Abstract Forms for the BMT Tandem Meetings and continuously updated general information are available on-line at the ASBMT Web site (www.asbmt.org) or CIBMTR Web site (www.cibmtr.org). Alternatively, contact BMT Tandem Meetings Headquarters c/o CIBMTR at the Medical College of Wisconsin, 9200 W. Wisconsin Ave, Ste. C5500, Milwaukee, WI, 53226, USA; phone: 262-827-4996; fax: 262-827-4997.

2009 Satellite Symposia Opportunities

Satellite Symposia opportunities are available for the 2009 BMT Tandem Meetings. All company-supported Satellite Symposia must follow all requirements (sanctions may be imposed for any violation of CME guidelines).

Satellite Symposium Proposal

Please send a cover letter with the completed "2009 Satellite Symposia Proposal Form" (enclosed, page 11) describing detailed objectives, content and faculty of the proposed Symposium, Disclosure of Relevant Financial Relationships for all planning company representatives in a position to control educational content and signed Planning Company Agreement. Both the letter and form must be submitted to BMT Tandem Meetings office no later than **Monday, June 30, 2008** to obtain highest consideration for the most popular time-slots. A joint Organizing Committee for the BMT Tandem Meetings and the Medical College of Wisconsin, as CME provider, will review proposals based on documented need(s), content and scientific merit.

Conditional Acceptance

Notification of conditional acceptance will be sent to applicants in August. Organizations whose proposals are conditionally accepted must forward all requested Symposium details including final agenda, confirmed faculty, Disclosure of Relevant Financial Relationships for all faculty and budget, to the BMT Tandem Meetings Office by **Friday, September 12, 2008** for final approval. Incomplete submissions will not be considered for final approval.

Final Approval

Notification of final approval will be sent to applicants in September. **Once final approval has been confirmed, changes to the program, agenda or faculty cannot be made without written request and approval by BMT Tandem Meetings and MCW.** Sanctions may be imposed for any violation of CME guidelines. For approved Symposia, a contribution to the BMT Tandem Meetings in the form of an educational grant is required, based on the enclosed schedule of Satellite Session opportunities. A 50% deposit is due on **Monday, October 27, 2008**. The grant should be submitted with the "Symposium Agreement Form" (which will be sent with notification of final approval). The grant will be used jointly by the ASBMT and CIBMTR to support educational activities. All Satellite Symposia are required to offer CME credit to attendees through the Medical College of Wisconsin (see Requirements, section 1 – page 5). Additional accreditation (through Syntaxx Communications) for the Pharmacists and Transplant Nurses attending the peripheral conferences, February 13 – 15, must be requested with the proposal and an additional fee of \$5,000 will be required.

Information about supplemental enduring materials is available upon request. All enduring educational materials must be pre-approved and coordinated through the Medical College of Wisconsin or its designated agent (see page 4).

60-Minute Breakfast Symposia

Breakfast sessions are available from 7:15-8:15 am, Wednesday, February 11, through Saturday, February 14, during the BMT Tandem Meetings funded by a **\$50,000** educational grant for concurrent symposia or **\$60,000** for a stand-alone symposium. An additional breakfast symposium is available on Sunday, February 15 for a **\$40,000** educational grant for a stand-alone symposium. The grant includes facility rental and CME administration, and a full buffet breakfast (food service 6:45-8:00 am) for conference attendees.

60-Minute Luncheon Symposia

Luncheon sessions are available from 12:30-1:30 pm, Wednesday, February 11, through Saturday, February 14, funded by a **\$55,000** educational grant for concurrent symposia or **\$75,000** for a stand-alone symposium. The grant includes facility rental and CME administration, and a full luncheon buffet (food service 12:00-1:15 pm) for conference attendees.

60-Minute Dinner Symposia

Dinner sessions are available on Thursday, February 12, and Friday, February 13. Each dinner symposium, from 7:30-8:30 pm, is funded by a **\$50,000** educational grant for concurrent symposia or **\$65,000** for a stand-alone symposium. The grant includes facility rental and CME administration, and a full dinner buffet (food service 7:15-8:15 pm) for all conference attendees. *A hosted bar is available (upon request prior to January 5, 2009) for an additional \$15,000.*

Enduring Educational Materials

All presentations at the BMT Tandem Meetings are the property of its organizers: the ASBMT and CIBMTR. Any unauthorized reprint, electronic replication or other dissemination of the content of the BMT Tandem Meetings is a copyright infringement. These ownership rights apply to the content of satellite symposia, plenary sessions, concurrent sessions, workshops, abstracts and all other scientific presentations.

Within these copyright restrictions, however, the production and dissemination of enduring educational materials based on satellite symposia at the BMT Tandem Meetings is encouraged. An enduring educational material can be a brochure, monograph, audiocassette, videocassette, slide program, podcast, CD-ROM, DVD, Web site/Internet-based presentation or other printed or electronically communicated program.

The organizers of the BMT Tandem Meetings offer a variety of formats for enduring educational materials for disseminating satellite symposia presentations well beyond the immediate audience attending a symposium. The cost of these enduring materials can be "bundled" into the fee for support of a satellite symposium.

Symposium Proceedings in Print

A readily available means of publishing satellite symposium proceedings is the ASBMT periodical *Blood and Marrow Transplant Reviews*. Now in its 17th volume, *BMTR* publishes papers presented at the BMT Tandem Meetings and other medical meetings. *BMTR* is a controlled-circulation periodical that allows for the precise targeting of an audience (such as the transplant community, a wider circle of hematologists/oncologists, or other health care providers and investigators) and the targeting of geographic areas (United States, Canada, international). The periodical also is published on the *BloodLine* Internet portal for hematology professionals (www.bloodline.net) and on the ASBMT Web site (www.asbmt.org). The cost for turnkey production, printing and mailing to a circulation of 10,000 hematologists/oncologists is \$42,000. Optional additional costs are for writing and editing (\$10,000) and for CME accreditation (\$6,000).

Symposium Proceedings on CD-ROM

BMTR Presents is a physician education series on CD-ROM produced by ASBMT. Each CD-ROM in the series typically presents the content of a single satellite symposium, including all the recorded audio and the speakers' visuals. Through controlled-circulation distribution, the audience can be precisely targeted. *BMTR Presents* also is published on the *Bloodline* Internet portal for hematology professionals (www.bloodline.net) and on the ASBMT Web site (www.asbmt.org). The typical project cost, including turnkey production, replication and mailed distribution of 5,000 copies is \$60,000, or for 10,000 copies \$78,000. An optional fee for CME accreditation is \$5,000.

Other Media and Formats

The organizers of the BMT Tandem Meetings welcome suggestions and recommendations for other media and formats for disseminating educational materials based on the meetings. Do not hesitate to contact CIBMTR or ASBMT to discuss concepts that you have in mind.

2009 Requirements for Satellite Symposia

Satellite Symposia held in conjunction with the 2009 BMT Tandem Meetings are not part of the core meeting agenda and will be designated as satellite sessions in the meeting program. Organizations hosting Satellite Symposia agree:

1. That the Medical College of Wisconsin (MCW) as continuing medical education (CME) provider retains the right to select and/or approve Satellite Symposia content, faculty, venue, printed collateral materials and all other aspects of the Symposium, consistent with the policies and requirements of the Accreditation Council for Continuing Medical Education (ACCME), and costs for providing CME credits and contact hours for allied health professionals to symposium attendees will be covered by the company. Once approved, changes to the program agenda or faculty cannot be made without written request and approval by BMT Tandem Meetings and MCW. Sanctions may be imposed for any violation of CME guidelines. Additional accreditation for Pharmacists and Transplant Nurses (through Syntaxx Communications) must be requested with the proposal and an additional fee of \$5,000 will be required.
2. To disclose to the Satellite Symposium audience at the beginning of the presentation (either orally or in writing) any funding source and relevant financial relationship between content planners, individual presenters or moderators and the Symposium's Commercial Supporter (e.g., employee, grant recipient, consulting fee, owner of significant interest or stock) or any other commercial interest; any potential conflict(s) of interest disclosed by a content planner, speaker or moderator MUST be resolved before proceeding with his/her role in this satellite symposium; each content planner, presenter, or moderator will be required to fully disclose any and all such financial relationships on the Satellite Symposia Speaker Disclosure Form (enclosed) in accordance with CME accreditation standards and guidelines before final approval of the Satellite Symposia will be granted; content planners, invited presenters/moderators who refuse to fully disclose financial relationships or complete the Disclosure Form and resolve potential conflicts will not be permitted to speak or perform any official role in the development/presentation of any accredited satellite symposium.
3. That the Satellite Symposium program and its content become the property of BMT Tandem Meetings and are governed by MCW as CME provider. A Planning Company hired by the Commercial Supporter becomes an agent of MCW and must be approved by MCW. Planning Companies that fail to comply with CME guidelines may have sanctions imposed, up to and including exclusion from further participation in the 2009 BMT Tandem Meetings and/or future BMT Tandem Meetings and/or meetings in which MCW acts as CME Provider. An authorized representative of the Planning Company and/or Commercial Supporter must sign and abide by "Planning Company Agreement to Comply with CME Rules and BMT Tandem Meeting Regulations" before conditional approval of the Satellite Symposia will be granted (Form enclosed).
4. That the Satellite Symposium must provide an opportunity for open question and answer sessions and permit evaluation by attendees. Evaluation Forms will be developed, distributed and tabulated by BMT Tandem Meetings in compliance with established CME guidelines. A summary of completed evaluations, including written comments, will be provided after the BMT Tandem Meetings.
5. That all Satellite Symposium planning (including set-up, food and beverage, audiovisual services and other arrangements) must be made through and handled by the meeting manager for the BMT Tandem Meetings, unless other arrangements are agreed upon to allow the Planning Company to relate directly with the convention center services staff. The meeting manager for the BMT Tandem Meetings, D'Etta Waldoch Benson, CMP, may be reached at bmttandem@cs.com or 262-827-4996; fax: 262-827-4997. When alternate arrangements are approved, the Planning Company must keep the meeting manager for the BMT Tandem Meetings fully informed of all communications with the hotel, resort or convention center staff.
6. To keep the educational purpose as the primary consideration for a Satellite Symposium, and to keep any food and beverage service modest and as a secondary element in organizing and publicizing the Symposium.
7. That BMT Tandem Meetings will provide a preliminary list of registered attendees (attendees can opt-out at the time of registration) to the Commercial Supporter one month prior to the Satellite Session. A full list of all BMT Tandem Meetings registrants will follow after the Meetings.
8. That the Planning Company must provide on-site staff to assist with any invited faculty needs, handout materials and other last-minute arrangements, logistics and traffic flow. BMT Tandem Meetings staff may be available to provide on-site assistance, if arranged prior to the conference, at a rate of \$50/hour/person.
9. That audiovisual (AV) technicians are required for all Satellite Symposia. All on-site audiovisual services, including projection during the Symposium, are provided by the BMT Tandem Meetings and the cost must be reimbursed by the Planning Company or the Commercial Supporter. Only by written agreement with the BMT Tandem Meetings and in special circumstances may a Planning Company, a Commercial Supporter or their agent be permitted to provide on-site audiovisual services or projection for a Satellite Symposium.
10. That no audio, video or other recording of a Satellite Symposium is permitted without consent of BMT Tandem Meetings. Any permitted audio, video or other recording must be made clearly evident to the audience.

11. That the Planning Company or Commercial Supporter must pay the entire BMT Tandem Meeting registration fee for Satellite Symposium speakers, moderators and chairs attending more than the day of the Symposium, or inform faculty that they are personally responsible for payment of the meeting registration fee.
12. That the Planning Company and the Commercial Supporter may not use "International Bone Marrow Transplant Registry", "Autologous Blood and Marrow Transplant Registry", "IBMTR/ABMTR", "Center for International Blood & Marrow Transplant Research", "CIBMTR", "Statistical Center", "Registry", "American Society for Blood and Marrow Transplantation", "ASBMT", "Medical College of Wisconsin", "MCW", "ACCME" or "Tampa Convention Center" or their respective logos on any announcement, sign, publication, audiovisual product or other promotional material without written permission. All promotional material must be approved by Carlyle H. Chan, MD, Interim Director of Continuing and Professional Education, Medical College of Wisconsin CME office cchan@mcw.edu, prior to distribution and no later than **Friday, January 9, 2009**. Promotional materials received after January 9, 2009, may not be considered or authorized.
13. That the Planning Company and the Commercial Supporter may not post on-site promotional signs in hotel or conference center lobbies without permission of the BMT Tandem Meetings. Placing promotional material under the doors of hotel guest rooms (or door drops of any kind) is not permitted.
14. That, if an unlabeled product or an unapproved use of a product is discussed during the Satellite Symposium, it must be disclosed to the audience that the product is not approved for the particular use in the United States. The Satellite Symposium content must be fair, balanced, scientifically valid and comply with current U.S. Food & Drug Administration guidelines. Any treatment recommendations must be made based on the best available evidence.
15. To remit a 50% deposit of total estimated grant no later than **Monday, October 27, 2008**. Deposits received after October 27, 2008, will incur a 10% delinquent fee; and to remit the balance of the educational grant, administrative fees and signed Letter of Agreement to the BMT Tandem Meetings no later than **Monday, November 24, 2008**. Residuals received after November 24, 2008, will incur a 10% delinquent fee. The unpaid balance of the educational grant received after the date of the symposium will incur a 25% delinquent fee. Any variance must be submitted to the BMT Tandem Meetings in writing prior to the due date and given pre-approval by the BMT Tandem Meetings and the MCW CME Department.
16. Additional costs, including on-site charges, will be billed after the 2009 BMT Tandem Meetings. All invoices must be paid by **April 30, 2009**, or will incur a 20% late fee and organizers may be ineligible for future Satellite Symposia submissions.
17. That all monies and fees associated with a Satellite Symposium are strictly regulated in accordance with CME rules. A violation may place the CME accreditation of a symposium in jeopardy. As a general rule, all monies and fees including the base grant (which covers facility rental, CME administration and food service) and audiovisual services fees, must be paid to the BMT Tandem Meetings, which in turn is responsible for disbursing those funds. Checks should be payable to the *Medical College of Wisconsin/BMT Tandem Meetings*. The only exceptions to this rule, which must be pre-approved in writing by the BMT Tandem Meetings and the CME Office of the Medical College of Wisconsin, are (a) stipends for faculty, the meeting registration fee and the actual travel costs for symposium faculty who may be reimbursed for these expenses by the Planning Company (but not directly by the commercial supporter) and (b) fees and expenses paid by the Commercial Supporter to and for the services of the Planning Company and/or creative services providers.
18. BMT Tandem Meetings strongly recommends that stipends for faculty and their expenses be paid by the Planning Company. **A letter from MCW as the CME Provider delegating fiduciary responsibility to the Planning Company will be required.** A letter of request must be submitted to Carlyle H. Chan, MD, with a copy to Sherry Fisher by January 9, 2009. Any payment or reimbursement by the Commercial Supporter directly to a symposium speaker, moderator or chair is strictly forbidden. To comply with CME regulations, all symposium-related expenditures by the Planning Company and the Commercial Supporter, as well as any of their agents, must be disclosed to the BMT Tandem Meetings and the Medical College of Wisconsin. Full accounting of all symposia-related expenses must be provided to the BMT Tandem Meetings manager within 30 days after the adjournment of the Meetings.
19. That if the Symposium is cancelled after **Monday, November 17, 2008**, there will be **no refund** to the Commercial Supporter.
20. That the creation and distribution of enduring materials based on Satellite Symposia is encouraged, but is governed by the "Requirements for the Development and Distribution of Enduring Education Materials from the BMT Tandem Meetings". A copy of the requirements can be obtained from the ASBMT Executive Office or the CIBMTR (see more information regarding Enduring Materials on page 4).
21. That payments of stipend and travel cost reimbursements to individuals on U.S. tourist/business visitor visas must comply with the regulations set forth by the US Internal Revenue Service (IRS) and the Medical College of Wisconsin, and taxes may be withheld pursuant to prevailing regulations. The approximately **30% U.S. tax charged against stipends for speakers who are non-U.S. citizens** will be funded by the commercial supporter, not by the BMT Tandem Meetings. Please contact D'Etta Waldoch Benson at bmttandem@cs.com, with questions regarding special forms required for invited faculty who are not US citizens.

2008-2009 Dates to Remember

for Satellite Session Planners

2008

- Monday, June 30 Deadline for Satellite Symposium Proposal and letter outlining objectives, content and faculty, Disclosure of Relevant Financial Relationships (page 16) for all planners in a position to control educational content and signed Planning Company Agreement (page 19-21).
- Late August Notification of conditional acceptance sent to applicants
- Friday, September 12 Final details due, including full agenda, confirmed faculty list with full contact information, Speaker Disclosure Forms, Planning Company Agreement, provisional budget, CME Activity Planning Worksheet and Commercial Support Agreement
- October Notification of final approval sent to applicants
- Monday, October 27 50% deposit of total estimated educational grant due with Satellite Symposium Reservation Form
- Monday, November 17 No refund if Satellite Symposium is cancelled after this date
MCW Forms for payments to International Faculty due
- Monday, November 24 Balance of grant due with signed Final Letter of Agreement

2009

- Friday, January 9 All promotional material must be approved by MCW CME. W-9 due for all US speakers or stipends will be paid after the meeting.
- February 11-15 **2009 BMT Tandem Meetings**
- Monday, March 17 Full expense report due and faculty reimbursement form with full disclosure
- Wednesday, April 30 All invoices must be paid in full

LAST YEAR'S SATELLITE SYMPOSIA, PRESENTED AT:

2008 BMT Tandem Meetings

Manchester Grand Hyatt, San Diego, CA

Celgene Corporation	<i>The Hematology Circle: Stem Cell Transplant in the Continuum of Care for Multiple Myeloma</i>
Genzyme Corporation	<i>Innovative Transplant Conditioning Regimens: Outcomes Improvement</i>
Millennium Pharmaceuticals	<i>Front-Line Therapy for Multiple Myeloma and Mantle Cell Lymphoma: The Role of Hematopoietic Cell Transplantation and Proteasome Inhibition Therapies</i>
Miltenyi Biotec GmbH	<i>Emerging Applications for Cellular Therapy</i>
Novartis Pharmaceuticals	<i>Strategies for the Management of Iron Overload in the Transplant Setting</i>
PDL BioPharma Inc.	<i>Reduced-Intensity Conditioning Regimens: Is There an Ideal?</i>
Pfizer, Inc.	<i>Antifungal Prophylaxis Against Mould Infections: Debating the Pros and Cons</i>
Pharmion Corporation	<i>Maximizing Treatment Outcomes for MDS in the Transplant Patient</i>
Schering-Plough Corporation	<i>Risky Business: Invasive Fungal Infections in BMT and HSCT</i>
THERAKOS, Inc.	<i>Improving Outcomes in Chronic GVHD Through Immune Regulation</i>
ViroPharma, Inc.	<i>CMV Disease in Stem Cell Transplantation: Challenges and Opportunities</i>

After Your Proposal Receives Conditional Acceptance...

Confirm Details & Budget

Complete the enclosed CME Activity Planning Worksheet, Commercial Support Agreement, Planning Company Agreement and Speaker Disclosure Forms as required by the Medical College of Wisconsin CME office. Complete the enclosed Budget Form outlining all disbursements to be made from the educational grant, as well as those not included in the grant such as meeting planning fees, faculty travel expenses and stipends, audio-visual equipment rental, etc. (see sample budget enclosed). Return the completed forms with a detailed agenda (including length of each presentation) and full contact information for invited faculty to Sherry Fisher by email: slfisher@mcw.edu or fax: 414.805.0713 prior to **Friday, September 12, 2008**.

Final Approval

Notification of final approval and a Satellite Symposium Reservation Form will be sent to applicants in September. No advertising or marketing related to the symposium may be done prior to notification of final approval.

Deposit & Satellite Symposium Reservation Form

A 50% deposit of the total educational grant (base grant plus additional funds to be disbursed) is due with the completed Satellite Symposium Reservation Form to hold your reserved date and time, by **Monday, October 27, 2008**. Checks should be made payable to the "Medical College of Wisconsin/BMT Tandem Meetings". Tax ID: 39-0806261.

Letter of Agreement

A Letter of Agreement will be prepared and forwarded to you for your final approval and signature. The balance of the grant and the Letter of Agreement are due **Monday, November 24, 2008**. Checks should be made payable to the "Medical College of Wisconsin/BMT Tandem Meetings".

Working with Medical College of Wisconsin CME Office: <http://www.mcw.edu/cme/>

To expedite approval of promotional material or for other information contact Carlyle H. Chan, MD, Interim Director of Continuing and Professional Education, Medical College of Wisconsin, at 414-456-4899, fax: 414-456-6623, e-mail: cchan@mcw.edu prior to January 9, 2009.

MCW CME Logo

Refer to the Medical College of Wisconsin CME web site regarding identity standards, guidelines for CME Disclosure, and required text for brochures and promotional announcements. Satellite Symposia must not use "CIBMTR", "IBMTR/ABMTR", "Statistical Center", "Registry", "ASBMT" or "Medical College of Wisconsin", "ACCME" or their respective logos on any announcement, sign, publication, audiovisual product or other promotional material without written permission. All promotional material must be approved by Carlyle H. Chan, MD before **Friday, January 9, 2009**.

Signage

Signage is the responsibility of the Planning Company. Five or six poster-size signs may be shipped to the meeting in advance, and placed throughout the Convention Center on the day of the Satellite Session. Easels will be provided. Sign content must be approved in advance by the MCW CME Office. (Note: Signs may not be posted until after the preceding satellite session has ended.)

Regarding On-site Logistics/Convention Services

Questions regarding initial planning efforts and scheduling faculty rehearsals prior to symposium may be directed to BMT Tandem Meetings Manager, D'Etta Waldoch Benson, CMP (bmttandem@cs.com), as some restrictions may apply regarding room set-up and other on-site logistics.

On-site Assistance Available

In addition to providing CME Evaluation Forms for distribution at the Satellite Symposium, BMT Tandem Meetings will assist with coordinating food and beverage and meeting set-up arrangements with the Convention Services staff at no charge.

For additional on-site assistance, such as receiving and unpacking conference materials, setting up displays and shipping, and arranging for satellite session rehearsal logistics, please contact D'Etta Waldoch Benson. Simple requests will be handled without additional charge. Labor- or staff-intensive tasks will incur additional fees not to exceed \$50/hour/person.

Forms Enclosed

Satellite Proposal Form

Pg 11 **2009 Satellite Symposia Proposal Form**

After Your Proposal Receives Conditional Acceptance...

Pp 12-13 **CME Activity Planning Worksheet for Satellite Symposia**

Pg 14 **Written Agreement for Commercial Support for CME Activity**

Pg 16 **Disclosure of Relevant Financial Relationships Form**

Pg 18 **Attestation Form**

Pp 19-21 **Planning Company Agreement to Comply with CME Rules and Regulations**

Pp 22-23 **Budget Form and Guidelines for Budgeting and Faculty Reimbursement**

Pg 24 **Sample Confirmation Letter to Faculty**

Pg 25 **Faculty Reimbursement Form**

Pg 26 **Taping Consent Form**

Pg 27 **Payments of Stipend and/or Travel Reimbursement to Individuals on Visas**

2009 Satellite Symposia Proposal Form

2009 BMT Tandem Meetings – Tampa Convention Center, Tampa, FL

Email this Form with cover letter to slfisher@mcw.edu c/o Sherry L. Fisher, Associate Director of Development, CIBMTR, Medical College of Wisconsin, 9200 W. Wisconsin Ave, Ste C5500, Milwaukee, WI, 53226

RETURN THIS FORM BEFORE **Monday, June 30, 2008**

Please include a cover letter detailing the documented need(s), objectives, content and faculty (to the extent known) of the proposed Symposium. A joint Organizing Committee for BMT Tandem Meetings and the Medical College of Wisconsin as CME provider will review proposals based on documented need(s), content and scientific merit. **Incomplete submissions will be returned.**

Symposium Title: _____

*Please indicate first, second & third time preferences **by number**; additional offerings may be available at a later date:*

	Breakfast Symposia		Luncheon Symposia		Dinner Symposia	
	Concurrent	Stand-alone	Concurrent	Stand-alone	Concurrent	Stand-alone
Wednesday Feb 11	[] \$50,000	[] \$60,000	[] \$55,000	[] \$75,000		
Thursday Feb 12	[] \$50,000	[] \$60,000	[] \$55,000	[] \$75,000	[] \$50,000	[] \$65,000
Friday Feb 13	[] \$50,000	[] \$60,000	[] \$55,000	[] \$75,000	[] \$50,000	[] \$65,000
Saturday Feb 14	[] \$50,000	[] \$60,000	[] \$55,000	[] \$75,000		
Sunday Feb 15		[] \$40,000				

[] We may be interested in a hosted bar for an additional \$15,000 (dinner symposium only)

[] We may be interested in Enduring Educational Materials related to this symposium. Please contact us to discuss options.

[] We are interested in applying for accreditation for Pharmacists and Nurses for a \$5,000 fee. Contact us to discuss options.

Comments: _____

Commercial Supporter Contact Person: _____

Title: _____

Company/Institution: _____

Street Address/PO Box: _____

City: _____ State/Province: _____ Zip: _____

Country: _____ E-mail: _____

Telephone: _____ Fax: _____

Name of **Meeting Planning Company**: _____

Primary Meeting Planner: _____ Email: _____

Street Address/PO Box: _____

City: _____ State/Province: _____ Zip: _____

Country: _____ Telephone: _____ Fax: _____

[] Required: Planning Company Agreement attached

[] Required: Disclosure of Relevant Financial Relationships attached for all planning company representatives in a position to control educational content

For more information about 2009 BMT Tandem Meeting support opportunities, contact:

Sherry L. Fisher, Associate Director of Development -CIBMTR: 414.805.0687

General information about the 2009 BMT Tandem Meetings is available on-line: www.asbmt.org -or- www.cibmtr.org

2009 BMT Tandem Meetings

CME Activity Planning Worksheet for Satellite Symposia

Please return this form by **Friday, August 29**, to BMT Tandem Meetings by email: bmttandem@cs.com or fax: 262-827-4997. Attach additional pages as needed.

Program Title: _____

Submitted by: _____

Attach list of all faculty with professional and academic titles, full address, telephone, fax and email address.

NEEDS ASSESSMENT

Please describe how the need for this program was determined. Be as specific as possible. If the purpose of the program is to provide new medical knowledge, list journal references or other sources of the information. Were the participants (or potential participants) consulted or surveyed? If so, please describe how they were consulted.

TARGET AUDIENCE

For whom is the activity intended? Please describe the participants, as specifically as possible.

EDUCATIONAL OBJECTIVES and/or PURPOSE

State the educational purpose and/or learning objective(s) for this activity. Upon completion of the activity, what knowledge, skills and/or attitudes should the participants have acquired? Be as specific as possible.

EDUCATIONAL METHODOLOGY AND FORMAT

How will the knowledge, skills or attitudes described in the objectives be transferred to the participants (e.g., lecture, case presentation, problem based learning, computer assisted instruction, etc.)?

PLANNING MINUTES & BUDGET

Please keep minutes or make notes to document the planning process that took place prior to the date of the activity. Attach a copy of the planning documentation (notes from telephone correspondence, e-mail or letters related to the planning of the program are appropriate documentation). A copy of the proposed budget (refer to enclosed Guidelines) should be submitted with this worksheet. Be sure to specify proposed speaker stipends and travel expense allowances.

EVALUATION

Evaluation Forms will be distributed to all meeting participants by BMT Tandem Meetings on-site with meeting registration materials. Comments will be taken into consideration when determining future venues and meeting format. Participants will receive CME credit based only on educational and satellite sessions actually attended and evaluated. NOTE: Organizers of the BMT Tandem Meetings will coordinate the required evaluation process associated with CME accreditation. Commercial Supporters /Satellite Planners will be provided with a Satellite Session Evaluation Form for final review, prior to the Meetings. Suggestions for evaluation questions and/or format will be taken into consideration for each Satellite Session. Please contact D'Etta Waldoch Benson at the BMT Tandem Meetings office (bmttandem@cs.com) with questions/suggestions.

SPEAKER DISCLOSURE FORM

*Organizers of accredited CME programs must disclose to participants prior to educational activities the existence of any relevant financial or other relationship a content planner, speaker or moderator/organizer has with the manufacturer(s) of any commercial product(s) or provider(s) of any commercial service(s) discussed in an educational presentation. Information that a speaker/moderator has no relevant financial relationships, if applicable, must also be provided to the learner. **Organizers must state here how this information will be communicated to the audience.** Content planners, speakers and moderators must complete the form and forward it to the BMT Tandem Meetings office by **August 29, 2008**. A copy of each completed form will be on file in the Medical College of Wisconsin CME office prior to the program, as well as available at the meeting for review by participants. Those who do not provide organizers with disclosure information by the established deadline will be considered refusing to disclose and will not be allowed to present or act in any official capacity within the context of the accredited satellite symposium.*

Sanctions may be imposed for violation of any CME guidelines, which could result in probation or banning corporation and/or faculty member(s) from future participation in BMT Tandem Meeting Satellite Symposia with CME accreditation.



Commercial Support Rules of MCW Accredited CME Activities

Content planners, speakers and session moderators must complete and submit the disclosure form prior to the established deadline. Content planners, speakers and session moderators are required to disclose any financial relationships they may have with a manufacturer of any drug, device, equipment or other product they discuss in an educational activity or with the commercial supporters of the accredited CME activity.

Fair Balance

Speakers are required to prepare fair and balanced presentations that are objective and scientifically rigorous. Speakers must disclose to the audience when they are reporting results of industry-based scientific research.

Unlabeled and Unapproved Uses

Presentations that provide information related to non-FDA approved uses for drug products and/or devices must clearly acknowledge the unlabeled indications or the investigational nature of their proposed uses to the audience. Speakers/authors who plan to discuss non-FDA approved uses for commercial products and/or devices must advise The Medical College of Wisconsin Office of CME of their intent prior to the delivery of the educational content. Such content may require content validity screening prior to final acceptance.

Use of Generic versus Trade Names

Presenters should use scientific or generic names as much as possible rather than brand names in their lectures or enduring materials. Should it be necessary to use a trade name, then trade names of all similar products or those within a class should be used, if such products exist at the time of the presentation.

Commercial Supporter Influence

Faculty members are not permitted to receive any direct remuneration or gifts from the commercial supporter(s) of this activity as it relates to this specific activity, nor should they be subject to direct input from a commercial supporter regarding the content of their presentations.



WRITTEN AGREEMENT FOR COMMERCIAL SUPPORT

The Medical College of Wisconsin (MCW) is committed to presenting CME activities that promote improvements or quality in healthcare and are independent of the control of commercial interests. As part of this commitment, MCW has outlined in this written agreement the terms, conditions, and purposes of commercial support for its CME activities. Commercial Support is defined as financial, or in-kind, contributions given by a commercial interest¹, which is used to pay all or part of the costs of a CME activity.

Title of CME Activity		2009 BMT Tandem Meetings	
Activity Location	Tampa Convention Center, Tampa, FL	Activity Date	February 11-15, 2009
Name of Commercial Interest			
Amount of Educational Grant (direct or in-kind)			
Grant will be used for the following:			
Speaker Stipends	Speaker Expenses (itemize)	Meeting Expenses (itemize)	Other (list)

Terms, Conditions, and Purposes

Independence

1. This activity is for scientific and educational purposes only and will not promote any specific proprietary business interest of the Commercial Interest.
2. The Accredited Provider is responsible for all decisions regarding the identification of educational 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 CME, selection of education methods, and the evaluation of the activity.
3. The commercial supporter is expressly prohibited from specifying the manner in which the CME Provider will fulfill the requirements of the ACCME's Elements, Policies, and Standards.

Appropriate Use of Commercial Support

3. The Accredited Provider will make all decisions regarding the disposition and disbursement of the funds from the Commercial Interest.
4. The Commercial Interest will not require the Accredited Provider to accept advice or services concerning teachers, authors, or participants or other education matters, including content, as conditions of receiving this grant.
5. All commercial support associated with this activity will be given with the full knowledge and approval of the Accredited Provider. No other payments shall be given to the director of the activity, planning committee members, teachers or authors, joint sponsor, or any others involved with the supported activity.
6. The Accredited Provider will upon request, furnish the Commercial Interest documentation detailing the receipt and expenditure of the commercial support.

Commercial Promotion

7. Product-promotion material or product-specific advertisement of any type is prohibited in or during the CME activity. The juxtaposition of editorial and advertising material on the same products or subjects is not allowed. Live or enduring promotional activities must be kept separate from the CME activity. Promotional materials cannot be displayed or distributed in the education space immediately before, during or after a CME activity. Commercial Interests may not engage in sales or promotional activities while in the same room as the CME activity.
8. The Commercial Interest may not be the agent providing the CME activity to the learners.

Disclosure

9. The Accredited Provider will ensure that the source of support from the Commercial Interest, either direct or “in-kind,” is disclosed to the participants, in program brochures, syllabi, and other program materials, and at the time of the activity. This disclosure will not include the use of a trade name or a product-group message. The acknowledgment of commercial support may state the name, mission, and clinical involvement of the company or institution and may include corporate logos and slogans, if they are not product promotional in nature.

The Commercial Supporter and MCW agree to abide by all requirements of the Accreditation Council for Continuing Medical Education (ACCME) *Standards for Commercial Support of Continuing Medical Education* and the prevailing standards of the *AMA PRA Category 1 Credit*™ program.

Name of Accredited Provider		The Medical College of Wisconsin, Inc.	
Tax ID Number		39-0806261	
Contact Person	Carlyle H. Chan, MD	Email Address	cchan@mcw.edu
Phone Number	414-456-4899	Fax Number	414-456-6623

Educational Partner (if applicable)	
Contact Person	Email Address
Phone Number	Fax Number
Tax ID Number	

Name of Commercial Interest	
Address	
City, State, Zip	
Contact Person	Email Address
Phone Number	Fax Number

Agreed by Authorized Representatives

Commercial Interest

Signature and Date

Print Name

Title

Accredited Provider

Signature and Date

Print Name

Title

Educational Partner/Joint Sponsor (if applicable)

Signature and Date

Print Name

Title

¹ The Medical College of Wisconsin (MCW) defines a Commercial Interest as any proprietary entity producing, marketing, re-selling or distributing health care goods or services consumed by, or used on, patients. MCW does not consider providers of clinical service directly to patients to be commercial interests. Units of the federal, state or local government are not considered to be commercial interests for CME purposes.



Disclosure of Relevant Financial Relationships

Title of Accredited Activity: 2009 BMT Tandem Meetings – Satellite Symposia

Faculty Member Name: _____

Title of Speaker’s Presentation: _____

Date of Activity: February ____, 2009 **Supported by (Company):** _____

First, list the names of commercial interests (i.e., any entity producing, marketing, re-selling or distributing healthcare goods or services consumed by, or used on, patients) with which you or your spouse/partner have, or have had, a relevant financial relationship within the past 12 months. For this purpose we consider the relevant financial relationships of your spouse or partner that you are aware of to be yours.

Second, describe what you or your spouse/partner received (ex: salary, stipend etc). The Medical College of Wisconsin does NOT want to know how much you received.

Third, describe your role.

Example terminology

What was received: Salary, royalty, intellectual property rights, consulting fee, stipends, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit.

Role(s): Employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities (please specify).

Commercial Interest	Nature of Relevant Financial Relationship (Include all those that apply)	
	What was received	For What Role?
<i>Example: Company X'</i>	<i>Stipend</i>	<i>Speaker</i>
<input type="checkbox"/>	Relevant financial relationships listed below <i>and</i> Attestation Form (pg 18) completed.	
<input type="checkbox"/>	I do not have any relevant financial relationships with any commercial interests.	

Date Form Completed

By:

Return this form to D'Etta Waldoch Benson at bmttandem@cs.com or fax (262-827-4997)

On-site verbal disclosure made by _____ Date _____ (For CME Representative Use Only)

Glossary of Terms

Commercial Interest

The Medical College of Wisconsin (MCW) defines a “commercial interest” as any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. Non-profit or government organizations and non-health care related companies are not considered commercial interests for CME purposes.

Financial relationships

Financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, stipends, 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 (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities from which remuneration is received, or expected. The Medical College of Wisconsin considers relationships of the person involved in the CME activity to include financial relationships of a spouse or partner.

Relevant financial relationships

The Medical College of Wisconsin focuses on financial relationships with commercial interests in the 12-month period preceding the time that the individual is being asked to assume a role controlling content of the CME activity. MCW has not set a minimal dollar amount for relationships to be significant. Inherent in any amount is the incentive to maintain or increase the value of the relationship. MCW defines “relevant” financial relationships” as financial relationships in any amount occurring within the past 12 months that create a conflict of interest. ***Relevant financial relationships will be disclosed to the audience/participants in advance of each activity certified for CME credit.***

Conflict of Interest

Circumstances create a conflict of interest when an individual has an opportunity to affect CME content about products or services of a commercial interest with which he/she has a financial relationship.

Attestations

Please indicate your understanding of, and willingness to comply with, each statement below by checking the appropriate box. If you have any questions regarding your ability to comply, please contact D'Etta Waldoch Benson bmttandem@cs.com as soon as possible.

Agree **Disagree** I have disclosed to the Medical College of Wisconsin (MCW) all relevant financial relationships, and this information will be disclosed to the learners verbally and/or in writing.

Agree **Disagree** The content and/or presentation of the information with which I am involved will promote quality or improvements in healthcare and **will not** promote a specific proprietary business interest of a commercial interest. Content for this activity, including any presentation of therapeutic options, will be well-balanced, evidence-based and unbiased.

Agree **Disagree** **N/A** I have not, and will not accept any stipends, additional payments or reimbursements beyond that which has been agreed upon directly with the MCW.

Agree **Disagree** I understand that MCW may need to review my presentation and/or content prior to the activity, and I will provide educational content and resources in advance as requested.

Agree **Disagree** If I am presenting at a live event, I understand that a CME monitor may be attending the event to ensure that my presentation is educational, and not promotional, in nature.

Agree **Disagree** If I am providing recommendations involving clinical medicine, they will 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 or used in CME in support of justification of a patient care recommendation will conform to the generally accepted standards of experimental design, data collection and analysis.

Agree **Disagree** **N/A** If I am discussing specific health care products or services, I will use generic names to the extent possible. If I need to use trade names, I will use trade names from several companies when available, and not just trade names from any single company.

Agree **Disagree** **N/A** If I am discussing any product use that is off label, I will disclose that the use or indication in question is not currently approved by the FDA for labeling or advertising.

Agree **Disagree** **N/A** If I have been trained or utilized by a commercial entity or its agent as a speaker (e.g., speaker's bureau) for any commercial interest, the promotional aspects of that presentation will not be included in any way with this activity. If I am presenting research funded by a commercial company, the information presented will be based on generally accepted scientific principles and methods, and will not promote the commercial interest of the funding company.

I have carefully read and considered each item in this form, and have completed it to the best of my ability.

Signed: _____ **Date:** _____

2009 BMT Tandem Meetings Planning Company Agreement to Comply with CME Rules and BMT Tandem Meetings Regulations

Return this form to D'Etta Waldoch Benson at bmttandem@cs.com or fax (262-827-4997)

Purpose of Satellite Symposia at the BMT Tandem Meetings

The purpose of Satellite Symposia at the BMT Tandem Meetings is to bring useful, up-to-date, scientifically accurate, balanced, unbiased information to blood and marrow transplantation clinicians and investigators.

All aspects of a Satellite Symposium must flow from this single purpose. Anything that interferes with that purpose must be excluded from the Satellite Symposium.

CME Rules and BMT Tandem Meeting Regulations

The following rules and regulations have been developed for all independent planning companies, medical communications companies, meeting planning companies and other entities (hereafter called "Planning Company") that assist with the development and implementation of a Satellite Symposium:

1. An authorized representative of the Planning Company must sign this "Planning Company Agreement to Comply with CME Rules and BMT Tandem Meeting Regulations" before final approval of a Satellite Symposium is granted.
2. A Planning Company hired by a Commercial Supporter becomes an agent of the continuing medical education (CME) provider and must be approved by the Medical College of Wisconsin. The exclusive CME provider for the BMT Tandem Meetings is the Medical College of Wisconsin (MCW). Additional accreditation for Pharmacists and Transplant Nurses (through Syntaxx Communications) must be requested with the proposal and an additional fee of \$5,000 will be required.
3. Planning Companies that fail to comply with CME guidelines may have sanctions imposed, up to and including exclusion from further participation in the BMT Tandem Meetings and/or future BMT Tandem Meetings and/or activities in which MCW acts as CME Provider.
4. The Medical College of Wisconsin, as CME provider, retains the right to select and/or approve Satellite Symposium content, faculty, venue, printed collateral materials and all other aspects of the symposium, consistent with the policies and requirements of the Accreditation Council for Continuing Medical Education (ACCME). Once approved, changes to the program agenda or faculty cannot be made without written request and approval by BMT Tandem Meetings and MCW.
5. Upon presentation at the BMT Tandem Meetings, the Satellite Symposium program and its content become the property of BMT Tandem Meetings and are governed by the Medical College of Wisconsin as CME provider.
6. Corporate funding and other forms of support for a Satellite Symposium must be disclosed at the beginning of the presentation (either orally or in writing) to the symposium audience. Also, any grant support or other relevant financial relationship between content planners, an individual presenter, moderator or chair and the symposium's Commercial Supporter must be disclosed and potential conflicts resolved prior to final approval. This may include, but is not limited to, employment, grant support, consulting fee or stock ownership. Each member of the symposium faculty is required to complete a Disclosure Form in accordance with CME accreditation standards and guidelines.
7. The Satellite Symposium must provide an opportunity for an open question and answer session and permit evaluation by attendees. Evaluation Forms will be developed, distributed and tabulated by the BMT Tandem Meetings in compliance with established CME guidelines. A summary of completed evaluations, including written comments, will be provided after the BMT Tandem Meetings.
8. If an unlabeled product or an unapproved use of a product is discussed during the Satellite Symposium, it must be disclosed to the symposium audience that the product is not approved for the particular use in the United States. The Satellite Symposium content must be fair, balanced, scientifically valid and comply with current U.S. Food & Drug Administration guidelines. Any treatment recommendations must be made based on the best available evidence.

9. The costs for providing CME credits (as well as contact hours for allied health professionals) to symposium attendees must be paid by the Planning Company or the Commercial Supporter.
10. All monies and fees associated with a Satellite Symposium are strictly regulated in accordance with CME rules. A violation may place the CME accreditation of a symposium in jeopardy. As a general rule, all monies and fees including the base grant (which covers facility rental, CME administration and food service) and audiovisual services fees, must be paid to the BMT Tandem Meetings, which in turn is responsible for disbursing those funds. Checks should be payable to the *Medical College of Wisconsin/BMT Tandem Meetings*. The only exceptions to this rule, which must be pre-approved in writing by the BMT Tandem Meetings and the CME Office of the Medical College of Wisconsin are (a) stipends for faculty, the meeting registration fee and actual travel costs for symposium faculty who may be reimbursed for these expenses by the Planning Company (but not directly by the commercial supporter) and (b) fees and expenses paid by the Commercial Supporter to and for the services of the Planning Company and/or creative services providers.
11. BMT Tandem Meetings strongly recommends that stipends for faculty and their expenses be paid by the Planning Company. **A letter from MCW as the CME Provider delegating fiduciary responsibility will be required.** A letter of request must be submitted to Carlyle H. Chan, MD, with a copy to Sherry Fisher by January 9, 2009. Any payment or reimbursement by the Commercial Supporter directly to a symposium speaker, moderator or chair is strictly forbidden. To comply with CME regulations, all symposium-related expenditures by the Planning Company and the Commercial Supporter, as well as any of their agents, must be disclosed to the BMT Tandem Meetings and the Medical College of Wisconsin. Full accounting of all symposia-related expenses must be provided to the BMT Tandem Meetings manager within 30 days after the adjournment of the Meetings.
12. The Planning Company or Commercial Supporter must pay the entire BMT Tandem Meetings registration fee for Satellite Symposium speakers, moderators and chairs attending more than the day of the Symposium, or inform the faculty members that they are personally responsible for payment of the meeting registration fee.
13. Travel cost reimbursements to individuals on U.S. tourist/business visitor visas must comply with the regulations set forth by the US Internal Revenue Service (IRS) and the Medical College of Wisconsin, and taxes may be withheld pursuant to prevailing regulations. The approximately 30% U.S. tax charged against stipends for speakers who are non-U.S. citizens will be funded by the commercial supporter, not by the BMT Tandem Meetings. (For questions regarding special forms required for invited faculty who are not U.S. citizens, contact D'Etta Waldoch Benson at bmttandem@cs.com or 262-827-4996.)
14. Education is the primary purpose of a Satellite Symposium. Food and beverage must be modest and a secondary element in organizing and publicizing the symposium.
15. All Satellite Symposium planning (including set-up, food and beverage, audiovisual services and other arrangements) must be made through and handled by the meeting manager for the BMT Tandem Meetings, unless other arrangements are agreed upon to allow the Planning Company to relate directly with the convention services staff. The meeting manager for the BMT Tandem Meetings, D'Etta Waldoch Benson, CMP, may be reached at bmttandem@cs.com or 262-827-4996; fax: 262-827-4997. When alternate arrangements are approved, the Planning Company must keep the meeting manager for the BMT Tandem Meetings fully informed of all communications with the hotel, resort or convention services staff.
16. Audiovisual technicians are required for all Satellite Symposia. All on-site audiovisual services, including projection during the symposium, are provided by the BMT Tandem Meetings, and the cost must be reimbursed by the Planning Company or the Commercial Supporter. Only by prior agreement with the meeting manager for the BMT Tandem Meetings and in special circumstances may a Planning Company, a Commercial Supporter or their agent be permitted to provide on-site audiovisual services or projection for a Satellite Symposium.
17. No audio, video or other recording of a Satellite Symposium is permitted without consent of the BMT Tandem Meetings. Any permitted audio, video or other recording must be made clearly evident to the audience.
18. The Planning Company must provide on-site staff to assist with any invited faculty needs, handout materials and other last-minute arrangements, logistics and traffic flow. BMT Tandem Meeting staff may be available to provide on-site assistance, if arranged prior to the conference, at a rate of \$50 per hour per person.
19. The creation and distribution of enduring materials based on Satellite Symposia is encouraged, but is governed by the "Requirements for the Development and Distribution of Enduring Education Materials from the BMT Tandem Meetings." A copy of the requirements can be obtained from the CIBMTR or the ASBMT Executive Office.

20. The Planning Company and the Commercial Supporter may not post on-site promotional signs in the hotel or convention center lobbies without permission of the BMT Tandem Meetings. Placing promotional materials under the doors of hotel guest rooms (or "door drops" of any kind) is not permitted.
21. The Planning Company and the Commercial Supporter Host may not use "Center for International Blood & Marrow Transplant Research", "CIBMTR", "International Bone Marrow Transplant Registry", "Autologous Blood and Marrow Transplant Registry", "American Society for Blood and Marrow Transplantation", "IBMTR", "ABMTR", "ASBMT", "Registry", "Statistical Center", "Medical College of Wisconsin", "MCW", "ACCME", "Tampa Convention Center" or their respective logos on any announcement, sign, publication, audiovisual product or other promotional material without written permission. All promotional material must be approved by Carlyle H. Chan, MD c/o Medical College of Wisconsin Continuing Medical Education prior to distribution and no later than **Friday, January 9, 2009**. Promotional materials received after January 9, 2009 may not be considered or authorized.

By signing this "Planning Company Agreement To Comply with CME Rules and BMT Tandem Meeting Regulations," I certify that I have read and understand these rules and regulations and that I am an authorized agent of the company named below who can bind the company to compliance with these requirements as a condition of participation in the BMT Tandem Meetings.

_____ Date: _____
 Signature of Planning Company Representative

Print Name: _____

Title: _____

Name of Planning Company: _____

Address _____

Phone: _____ Fax: _____

Email: _____

2009 Satellite Symposium Budget Form

See Guidelines for Budgeting & Faculty Reimbursement (attached). Please forward completed form by Friday, August 29th to Sherry Fisher at slfisher@mcw.edu c/o BMT Tandem Meetings CIBMTR, Medical College of WI, 9200 W. Wisconsin Ave, Ste C5500, Milwaukee, WI, 53226, USA; fax: 414.805.0713.

Planning Company Representative: _____

Name of Commercial Supporter (Organization): _____

Planning Company Mailing Address: _____

Phone: _____ Fax: _____ E-mail: _____

Satellite Symposium Title: _____

Base Grant to be Paid to BMT Tandem Meetings by November 24, 2008:

EDUCATIONAL BASE GRANT \$ _____

(\$50,000 for Concurrent breakfast, \$60,000 for Stand-alone breakfast (\$40,000 for Sunday Stand-alone breakfast); \$55,000 for Concurrent luncheon, \$75,000 for Stand-alone luncheon; \$50,000 for Concurrent dinner, \$65,000 for Stand-alone dinner Symposium – includes facility rental, CME administration and food service.)

OTHER ANTICIPATED EXPENSES

ACPE and ONS Accreditation (\$5,000) \$ _____
 Hosted Bar (\$15,000) \$ _____

TOTAL TO BE SENT TO BMT TANDEM MEETINGS*: \$ _____ (50% deposit due October 27, 2008)

Anticipated Expenses to be Reconciled After the Meeting:

BMT Tandem Meetings recommend stipends for US citizens and travel expenses for all speakers are paid by the Planning Co.

CHAIR & FACULTY STIPENDS*- MCW suggested stipends amount per speaker: \$1,000 (see page 23).

\$ _____ Chair Stipend [] check if chair is a US citizen
 \$ _____ Faculty Stipends (\$ _____ x _____ # of US speakers; \$ _____ x _____ # of non-US speakers)
 \$ _____ Total Faculty Stipends (Chair stipend + faculty stipends)

ANTICIPATED CHAIR & FACULTY EXPENSE

Check if expenses will be paid by Planning Company (see below)

\$ _____ Conference Registration Fees
 \$ _____ Hotel
 \$ _____ Coach Airfare
 \$ _____ Ground Transportation
 \$ _____ Tolls and Parking
 \$ _____ Mileage @ \$0.505/mile (current May 2008)
 \$ _____ Meals
 \$ _____ Other Expense specify: _____
 \$ _____ Other Expense specify: _____
 \$ _____ **TOTAL**

ANTICIPATED AUDIO-VISUAL EXPENSE

\$ _____ **TOTAL**

(Actual cost of AV technician(s) and equipment rentals are shared by BMT Tandem Meetings and satellites and will be included in the final invoice after the overall meeting expenses are reconciled; typically shared AV costs are approximately \$6,000 per Satellite Symposium.)

ANTICIPATED MISCELLANEOUS SYMPOSIUM MANAGEMENT EXPENSE

\$ _____ Meeting Management Company Fees & Travel
 \$ _____ Creative Development (Printing/Publications)
 \$ _____ Other Expense, specify: _____
 \$ _____ Other Expense, specify: _____
 \$ _____ **TOTAL**

*Planning companies are strongly encouraged to obtain permission to prepay speaker expenses including travel and housing for all speakers and stipends for US citizens, whenever possible to simplify accounting. If travel and/or housing is not prepaid, original ticket stubs with the original credit card statement used to pay for the travel and/or housing must be submitted before reimbursement can be made, per Medical College of Wisconsin travel reimbursement policies. Missing documentation for expenses will delay reimbursement and may result in tax consequences. All other expenses associated with the cost of the Satellite Symposium including those payable to independent meeting management service providers or for creative development, printing and publication costs, should, after approval from MCW, be paid directly by the Commercial Supporter. Full budgetary disclosure is required under CME regulations and detailed reconciliation and documentation is required.

Guidelines for Budgeting & Faculty Reimbursement

Please use the following guidelines when preparing your Satellite Symposium budget and inviting faculty to present.

Communication with Invited Faculty

A list of all faculty, with professional and academic titles, full address, telephone, fax and email address must be sent to BMT Tandem Meetings at bmttandem@cs.com; fax: 262-827-4997 prior to [Friday, August 29, 2008](#). Copies of initial invitation letters sent by the Commercial Supporter or Planning Company to faculty should be included. Please refer to the enclosed sample confirmation letter for CME-related verbiage that should be included in your letter to invited faculty.

Planning companies, after obtaining BMT Tandem Meetings and Medical College of Wisconsin (MCW) approval, are strongly encouraged to prepay travel and housing expenses and stipends for all speakers, whenever possible to simplify accounting. Each planning company will need a letter from MCW as the CME Provider delegating fiduciary responsibility. Please submit a letter of request to Carlyle H. Chan, MD, with a copy to Sherry Fisher by January 9, 2009. If travel and/or housing costs are not prepaid, original ticket stubs and an original credit card statement used to pay for the travel and/or housing must be submitted before reimbursement can be made, per MCW travel reimbursement policies. Missing documentation for expenses may result in delayed reimbursement and tax consequences. All other expenses associated with the cost of the Satellite Symposium including those payable to independent meeting management service providers or for creative development, printing and publication costs, should be paid directly by the Commercial Supporter, after obtaining MCW approval to do so. Full budgetary disclosure is required under CME regulations and detailed reconciliation and documentation is required.

After the meeting, faculty will submit a Satellite Symposium Faculty Reimbursement Form (enclosed) to the commercial supporter or planner for signature, indicating approval of reimbursable expenses which have not been prepaid. The Travel Reimbursement Form with **original** (not photocopies) receipts for expenses and ticket stubs with original credit card receipts (if not prepaid) will then be forwarded to BMT Tandem Meetings by the representative for payment.

Stipends

Suggested stipends amount per speaker: \$1,000. Stipends are discretionary; however the MCW policy requires written pre-approval for stipend payments exceeding \$1,500 to any one person. Planning companies are strongly encouraged to pay speaker stipends, after obtaining BMT Tandem Meetings and Medical College of Wisconsin approval. Otherwise, stipends for US speakers will be paid **on-site** if a Form W-9 is received by the BMT Tandem Meetings by **January 9, 2009**. Stipends for foreign nationals will be paid by MCW after the meeting. It is the responsibility of the commercial supporter/planning company to obtain notarized copies of all necessary documents as listed on Stipend or Other Payment Form on page 27. A notary public will be provided on-site by BMT Tandem Meetings.

Conference Registration Fees — see www.asbmt.org -or- www.cibmtr.org for online registration.

Satellite Symposia faculty are exempt from paying the conference registration fee **only** for the day of their satellite session presentation. If faculty members arrive a day early or stay a day later and plan to attend any portion of the BMT Tandem Meetings beyond the day of the satellite session, payment in full for conference registration is required and faculty should register as "Member" or "Non-member" (as appropriate), rather than "Invited Faculty". Please make it clear that faculty will be invoiced for any unpaid conference registration fees, unless corporate funds are disbursed through BMT Tandem Meetings (faculty should be made aware of IRS ruling concerning income.)

Air Travel

Full coach should not exceed \$1,000 for domestic and business class fare should not exceed \$5,000 for international tickets. Travel coordination should be done by the Planner/Commercial Supporter as early as possible to attain lowest fares.

Ground Transportation

Ground transportation (taxi, airport shuttle, etc.) should be reimbursed for actual cost, not to exceed \$50 one-way from TPA airport to the Convention Center.

Hotel Accommodations

Hotel expense should be covered for a maximum of two nights: the night of the scheduled presentation and either the night before or immediately after, not to exceed \$300/night. Please make hotel reservations under the "BMT Tandem Meetings" group, or use the online housing form.

Meals/Per Diem

Meals should be reimbursed with original receipts for a maximum of three days: the day of travel to the meeting, the day of the scheduled presentation and the day of travel home. The Medical College of Wisconsin recommends that meals do not exceed \$54 per day.

Audiovisual Requirements

Cost of audiovisual rentals and technical support staff is not included in the educational base grant. Actual AV costs for Satellite Symposia are shared by BMT Tandem Meetings and all satellites, and will be included in the final invoice after the overall meeting expenses are reconciled; typically shared AV costs are approximately \$6,000 per Satellite Symposium.

ADA

Please keep in mind that the Americans with Disabilities Act (ADA) mandates that BMT Tandem Meetings, including all Satellite Symposia, must be completely accessible to all participants and faculty. Please contact D'Etta Waldoch Benson at 262-827-4996 **IMMEDIATELY** regarding any faculty member requiring special accommodation.

Sample Confirmation Letter

(sent to Satellite Symposium speakers by Corporate Planning Company on behalf of the CME provider, the Medical College of WI)

October 1, 2008

[Faculty Member]

[Address]

[City, State, Zip]

Dear [Faculty Member]:

Thank you for agreeing to present at the upcoming Satellite Symposium entitled, [Symposium Title]. This letter confirms plans for your engagement at the Tampa Convention Center in Tampa, FL on [date] from [begin time] to [end time]. Your topic is: [Topic or Actual Title of Talk]. The Conference is open to transplant physicians and allied health professionals from around the world. Overall attendance of more than 2,000 is expected.

A provisional agenda for the 2009 BMT Tandem Meetings is available online at either www.asbmt.org -or- www.cibmtr.org. Housing Reservations and Conference Registration are also available via either Web site. Satellite Symposia faculty attending the BMT Tandem Meetings for more than the day of the Symposium must pay the appropriate "Member" or "Non-member" registration fee.

Your stipend of [\$x,xxx] will be paid by the [Planning Company or BMT Tandem Meetings/Medical College of Wisconsin]. Conference-related travel expenses not prepaid by the Satellite Symposium Planning Company will be paid by the BMT Tandem Meetings/Medical College of Wisconsin upon completion of the program (refer to enclosed Satellite Symposium Faculty Reimbursement Form for details). Faculty traveling on US Tourist/Business Visitor Visas must complete appropriate forms in compliance with IRS and Medical College of Wisconsin regulations prior to travel. ITIN numbers or application (W7) must be submitted to BMT Tandem Meetings, along with MCW stipends form and a notarized copy of your passport photo page and I-94 card before stipends or travel reimbursements are paid. The Satellite Planning Company or corporate liaison for your Symposium has more information about these forms.

As an accredited CME provider, The Medical College of Wisconsin requires compliance with the ACCME's Standards for Commercial Support of CME. We will be disclosing to our participants that this CME activity has been supported by an educational grant from [Commercial Supporter]. As faculty, you are required to do the following:

- Disclose any relevant financial interest or any other relationship that you may have with the Commercial Supporter or manufacturer(s) of any commercial product/service that is discussed as part of your presentation at the beginning of your presentation, either orally, in the handout material or syllabus, or in the title slide preceding your presentation. If you have nothing to disclose, please state, or include a slide stating "no financial relationships to disclose".
- Advise the audience of unlabeled or unapproved uses of drugs or devices to which you refer in your presentation.
- Design a presentation that is fair, balanced, scientifically rigorous and free from bias. When discussing therapeutic options, please use only generic names. If it is necessary to use a trade name, those of several companies must be used, if such products exist at the time of your presentation. All recommendations for patient care and/or treatment options must be based on the best available evidence.

Any potential conflicts of interest indicated on the Disclosure Form must be resolved prior to the Symposium. Should you determine that you cannot comply with these requirements or any of the provisions of the Commercial Support Standards, please contact your commercial supporter's planning company or the BMT Tandem Meetings office as soon as possible.

We are looking forward to an exciting and educational meeting. Should you have any questions, please feel free to contact the BMT Tandem Meetings Manager, D'Etta Waldoch Benson, CMP at bmttandem@cs.com, or call 262-827-4996.

2009 Satellite Symposium Faculty Reimbursement Form

Questions? Please call 262-827-4996 or email: bmttandem@cs.com.

Instructions for Faculty: Please complete this Form and forward it to your Satellite Symposium Planner/Commercial Supporter representative for signature, along with original (not photocopies, faxes or emails) receipts, ticket stubs and credit card statements, if applicable. **YOUR CHECK CANNOT BE PROCESSED WITHOUT YOUR SIGNATURE AND THE SIGNATURE OF THE PLANNER/COMMERCIAL SUPPORTER AT THE BOTTOM OF THIS PAGE.**

Your Planner/Commercial Support Representative is: _____ **Phone:** _____

Satellite Symposium: _____

Commercial Support Organization: _____ **Date of Program:** _____

Approved Amount of Stipend: \$ _____

Check if you do not have travel expenses to submit to BMT Tandem Meetings; skip to section "Make Check Payable to"
If you have travel expenses to submit, please complete the information in the box below and remainder of this Form.

Reimbursement Policy: Stipends may be paid on-site for U.S. speakers if we have your Form W9 on file 30 days prior to the conference. Planning companies are strongly encouraged to obtain permission to prepay or reimburse for speaker travel and housing costs to simplify accounting. Reimbursement for travel and housing expenses not prepaid by the planning company will be disbursed by BMT Tandem Meetings/Medical College of Wisconsin (MCW) within 3-4 weeks of receiving the completed Satellite Symposium Faculty Reimbursement Form with original travel receipts, ticket stubs and credit card statements. Emailed and faxed receipts or photocopies are not considered originals and will not be accepted as proof of payment by MCW. Faculty and planner/commercial supporter signatures (below) are required for reimbursement. Stipends checks not cashed within 6 months of issue date will be considered void.

Instructions for Planner/Commercial Supporter Representative: Please document any expenses prepaid or reimbursed in the box below, to the right of the check boxes. Your signature on this Form indicates acknowledgment of expenses incurred and approval for reimbursement of expenses to Faculty. Please mail this Form (requires two signatures) and original receipts (not photocopies) to D'Etta Waldoch Benson, BMT Tandem Meetings Headquarters, c/o CIBMTR, Medical College of Wisconsin, Suite 2500, 9200 W. Wisconsin Ave, Ste C5500, Milwaukee, WI, 53226, USA.

FOR REIMBURSEMENT OF STIPEND PLUS TRAVEL EXPENSE:

REMINDER: Stipends cannot be prepaid or reimbursed by the Commercial Supporter.

\$ _____ Stipend	<input type="checkbox"/> prepaid by: _____ \$ _____
\$ _____ Conference Registration Fee	<input type="checkbox"/> prepaid/reimbursed by: _____ \$ _____
\$ _____ Hotel	<input type="checkbox"/> prepaid/reimbursed by: _____ \$ _____
\$ _____ Coach Airfare	<input type="checkbox"/> prepaid/reimbursed by: _____ \$ _____
\$ _____ Ground Transportation	<input type="checkbox"/> prepaid/reimbursed by: _____ \$ _____
\$ _____ Tolls and Parking	<input type="checkbox"/> reimbursed by: _____ \$ _____
\$ _____ Mileage _____ miles @\$0.505 (as of May 2008)	<input type="checkbox"/> reimbursed by: _____ \$ _____
from: _____ to: _____	
\$ _____ Meals	<input type="checkbox"/> reimbursed by: _____ \$ _____
\$ _____ Other, specify: _____	<input type="checkbox"/> reimbursed by: _____ \$ _____
\$ _____ Other, specify: _____	<input type="checkbox"/> reimbursed by: _____ \$ _____
\$ _____ TOTAL STIPEND PLUS EXPENSE	

Make Check Payable to: _____

Social Security # or Tax ID# (Check one only, and provide number): _____

Institution/Department: _____

Address: _____

City: _____ State: _____ Zip: _____ Country _____

Phone: _____ Fax: _____ E-mail: _____

(Home Address required for US citizens by IRS): _____

City: _____ State: _____ Zip: _____

Mail check to: Office address Home address

Faculty Signature: _____ **Date:** _____

The above expenses have been reviewed and are approved for payment.

REMINDER: Faculty and planner/commercial support representative signatures are required for reimbursement to be processed.

Commercial Support Representative Signature: _____ **Date:** _____

Phone: _____ Fax: _____ E-mail: _____

2009 BMT Tandem Meetings

Satellite Symposia Faculty Audiovisual Recording Consent Form

Faculty Member Name: _____

Satellite Symposium: _____

Commercial Supporter: _____ Date/Time of Program: _____

Audiotape and Videotape Permission

- My signature below indicates my approval to produce and duplicate a recording of my presentation, and that I will not receive any of the proceeds of the sale of audio or video recordings or written summaries or transcripts.**

All recordings become the property of BMT Tandem Meetings.

Signature of Faculty Member

- Please do not audio or video record my presentation.**

NOTE: Speakers who wish to receive a complimentary audio cassette copy of their presentation, should go to the recording company sales desk immediately after the session to make their request. Complimentary tapes and/or CDs will not be available after the meeting.

Credit for Attendance

Faculty requesting continuing medical education (CME) credits, or continuing education units for pharmacists or allied health professionals are reminded to submit appropriate attendance and evaluation forms within 15 days of the completion of the conference. Speakers may request to be awarded *AMA PRA Category 1 Credits™* for the preparation and delivery of their own talks consistent with prevailing policies of the AMA. A special form has been developed for this purpose and will be available to speakers on-site.



Stipend or Other Payment Form To be Completed by Invited Faculty

I certify that I am in or will be entering the United States as a:

- U.S. Citizen
- U.S. Permanent Resident
- B-1 Visa -- Business Visitor
- B-2 Visa -- Tourist
- WB Business Visitor on the Visa Waiver program
- WT Tourist on the Visa Waiver program
- Canadian Visa Waiver program (requires proof of Canadian Citizenship)
- Other _____ (note other statuses may not be eligible for stipend or other payment)

The following must be supplied in order to receive payment:

1. () I have supplied a copy of my Social Security Card or Individual Taxpayer Identification Number (ITIN) documentation or completed W9.
() I certify that I will apply for an ITIN and I will send such documentation to MCW's Payroll Department at the following address: 8701 Watertown Plank Road, Milwaukee, WI 53226.
2. Signed copy of this form dated prior to the date of the provided service.
3. A copy of your I-94 card or proof of Canadian Citizenship (does not apply to U.S. Citizens or U.S. permanent residents)

Contract for services is made with the understanding that these items must be obtained prior to payment being made. Due to Internal Revenue Service (IRS) and Department of Homeland Security regulations, Accounts Payable cannot make payment without all above-mentioned items.

In addition, stipend or other payments to individuals in B-1/B-2/WB/WT or Canadian Visa Waiver program are only eligible for stipend or other payment if the following apply:

- ✓ This payment is being made for a visit of nine (9) days or less; and
- ✓ You have not received payment of this type from more than five (5) other institutions in the last six (6) months.

Taxes will be withheld at the rate of 30% pursuant to IRS regulations.

Individuals requesting stipend payment must sign the bottom section of this form to assure they are aware of and agree to these conditions of payment prior to their providing service.

Printed Name

Signature

Date

To be obtained by Accounts Payable Office

HR Verification of Visa Status

Date

Accounts Payable

8/17/04