

**Society of Hospital Medicine: Quality Initiatives
Guidelines and Principles for Working with Funders
May 2011**

- The relationship will promote the values and mission of SHM.
 - The goal of SHM’s external partnerships is to promote excellence in clinical care, advance the practice of inpatient medicine and promote the needs of our patients and members through education, advocacy, and investigation.
- The relationship will maintain SHM objectivity and independence.
 - In entering this partnership, SHM will avoid influence from external organizations on the policies, conduct, actions and priorities of SHM. For example, only SHM may determine the content and speakers for a SHM educational conference.
- Program content will not reference or consider specific brands or products.
 - In order to maintain the utmost objectivity and autonomy, SHM program content will not be influenced by brand or product consideration during development or revisions.
- Strong consideration should be given to using multiple sources whenever possible for sponsorship of SHM events, services, programs, conferences or products.
 - In order to maintain the independence and objectivity described above, SHM will diversify its sources of support as much as possible.
 - When at all possible, SHM will seek multiple sources of funding to support specific disease-state programs.
- The relationship does not constitute an endorsement by SHM.
 - SHM may enter into relationships with external organizations with which it shares common interests or goals without endorsing every aspect of the other organization. Although SHM will not partner with organizations whose primary mission is directly at odds with the values and mission of SHM, a partnership should not imply that SHM endorses all policies, values and missions of the partner organization.
- SHM will be fully transparent with regard to the funding relationship (i.e., with all key stakeholders including Members, Mentors, Advisory Board Participants, Sponsors, and Participants in our QI Programs)
 - SHM will establish a special area on its website containing:

- A list of all sponsors/funders of SHM programs
 - A copy of this document listing the SHM guidelines and principles
- Point audiences to the guidelines and principles at key decision points, for example:
 - When SHM signs an agreement with a corporate sponsor
 - When SHM contracts with a Mentor or Advisory Board Participant
 - When SHM enrolls a hospital participant in one of its programs
 - When SHM launches a Resource Room
- Program content will be developed by SHM in the manner in which SHM chooses in accordance with accepted practices.
 - SHM will work with experts of its own choosing to develop programmatic or material content.
- Programs developed with support from external funders are operationally managed by SHM.
 - SHM will manage all aspects of programs that receive funding support.
- SHM will not disclose contact information for program participants to funders unless the individual participant gives specific permission to be contacted.
- In situations where funders have representatives working in the same institutions that are also hosting SHM programs, the representatives may not work on the SHM-hosted programs unless permission is given by the hosting institution and by SHM. All such funder representatives must disclose their employment status.
- SHM will provide regular project status updates to funders.
 - SHM will determine the content and the update frequency will be decided in conjunction with the funder.
- SHM and funder will determine program/project goals and objectives in advance of developing the partnership and will agree to these in a written memo of understanding or business agreement.
 - Any agreement or understanding should be made in writing and signed by both parties.
 - Revisions, additions or deletions, or any other alterations will also be made in writing and agreed to by both parties.
- Materials/content developed by SHM with financial support from a funder can be distributed through a variety of dissemination vehicles. Representatives of the funder may distribute the materials, but they may not be characterized as “agents” of SHM. The funder’s dissemination plans must be reviewed and approved by SHM and the material/content must include an

acknowledgment (e.g., cover sheet) that conveys the following messages in a fully transparent manner:

- SHM thanks the funder for their financial support
- SHM accepted the financial support because the topic is important to hospitalists and addresses improving the quality of patient care
- SHM has had sole responsibility for identifying experts to develop the materials
- SHM and these experts developed the materials autonomously, without any influence by the funder
- The funder complied with SHM's policies and procedures with regard to developing the materials
- An explanation as to why the funder chose to support the development of the materials (e.g., a partnership with a highly credible source, SHM, to develop content that can improve patient care)

Approved by SHM Board May 10, 2011