

CSHP Board and Branch Reference Manual

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| TITLE: Endorsement | REVISED: |

BACKGROUND

CSHP occasionally receives requests from its members or external organisations to endorse a product, service, or point of view (e.g., position statement).

An endorsement can have mutual benefits for CSHP, its members, and the owner of the product, service, or point of view. However, endorsements can become outdated and can contribute to drawing the wrong inference about the endorsement and to misuse of CSHP's name; all of which can tarnish CSHP's reputation.

The intent of this policy is to establish a framework for the approval of endorsements by CSHP without exposing CSHP to unnecessary risk of harming CSHP's reputation.

POLICY

CSHP's Board is responsible for making all final decisions whether CSHP should endorse an external organization's product, service, or point of view.

The exact wording of expressing endorsement will depend on the nature of the product, service, or point of view, but could include "endorsed by CSHP", "supported by CSHP" or "produced in partnership with the CSHP." When the product, service, or point of view is available in French, an equivalent statement of endorsement is provided in French.

CSHP reserves the right to suspend or withdraw its endorsement at any time for any cause, including CSHP's reputation is tarnished through misuse or misunderstanding of the endorsement.

CSHP bears no legal or financial responsibility related to the endorsement, as that rests with the external organization (or individual).

CSHP members, as *individuals*, may give opinions or endorse a product, service, or point of view. When such personal opinion or endorsement is given by a CSHP member who holds a leadership or other visible role in CSHP (e.g., staff of CSHP, member of the Board, chair of an affiliated board, committee, task force, or working group), the individual should provide an additional statement that the opinion or endorsement is personal, and that the views given do not represent nor should be interpreted as the official views of CSHP.

CSHP reserves the right to endorse multiple products or services on the same or similar topics.

CSHP Board and Branch Reference Manual

CSHP does not endorse the products, services, or advocate for points of view supported by industry or for commercial interests.

Any advertisement posted on CSHP's website or other material does not imply or give the impression of endorsement on the part of CSHP, nor that CSHP uses a product or service, or advocates a point of view or course of action.

CSHP accepts no form of payment (financial or other) in exchange for endorsement.

If the product, service, or point of view is in draft form, all related draft materials must be reviewed by CSHP before the program or publication is planned to be launched.

This policy applies to all forms of media (print, electronic, events, presentations).

The following are forms of endorsement, to which this policy applies:

- Financial support
- Use of the CSHP logo, with the exception of partnerships (see Exclusion)
- Statements that CSHP endorses a product, services, or supports a point of view, other than its own.

The following are not forms of endorsement:

- Partnerships with other organizations. Endorsement by CSHP is not required when CSHP partners with another organization to create or deliver a product or service.
- Letters of support for grant applications to funding agencies
- Any other circumstances where it is not clear that the Board has endorsed a product or service, or advocated for a point of view.

Criteria for endorsement

The following criteria are used to assess a request for endorsement:

- The goals of the product, service, or point of view are clear.
- The product, service, or point of view aligns with CSHP's mission, vision, and values.
- The methodology of development is sound, evidence-based, and transparent.
- The recommendation to endorse is evidence-based, reasonable from a hospital pharmacy perspective, and factors in risks vs. benefits for patients.
- The methodology and recommendation do NOT contradict the mission, values, or products or services of CSHP.
- It is preferable that the product, service, or point of view be available in both official languages.
- The risk of CSHP's reputation being damaged as a result of the endorsement is low.

This policy applies to CSHP National and all its branches.

CSHP Board and Branch Reference Manual

DEFINITION

Endorsement: Overall support for a product, service, or point of view based on a thorough review. The endorsement implies the following:

- the product, service, or point of view aligns with CSHP's mission, vision, or products or services;
- the product, service, or point of view reflects current, best practice;
- CSHP agrees with the content or information communicated.

PROCEDURES

Note: Wherever Board, Committee, Task Force, PSN, or Chair is written, the plural form can be assumed, as relevant to the situation.

Handling requests for endorsement

1. Requests provided by external organizations or CSHP members that CSHP endorse a product, service, or point of view are forwarded to the Executive Director (ED). These requests should include the following information:

- a) materials relevant to the request (e.g., program syllabus, publication)
- b) rationale for CSHP endorsement, including:
 - i. nature and purpose of the product, service, or point of view
 - ii. audience or stakeholders within CSHP membership (e.g., primary care pharmacists)
- c) deadlines for endorsement (if any); *and*
- d) description of how CSHP's endorsement will be acknowledged

2. The ED forwards it to the Executive Committee and/or Board for consideration.

Deciding whether to endorse

3. If the Executive Committee and/or Board chooses to not endorse the product, service, or point of view, the ED notifies the external organization or the CSHP members who requested the endorsement.

4. If the Executive Committee and/or Board chooses to consider endorsement, the ED forwards the request to the following people:

- a) chair of the most appropriate Board, Committee, Task Force, or PSN; and
- b) chair of the Pharmacy Practice Publications Steering Committee (P3SC).

5. The chair invites members of the Board, Committee, Task Force, or PSN and/or other CSHP members to express their interest in participating in the review. Each interested individual is expected to have knowledge and skills in reviewing documents, and complete the following tasks:

- a) signs and completes a Conflict of Interest (COI) disclosure form; *and*
- b) forwards his or her completed COI disclosure form and current curriculum vitae to the Chair(s)

CSHP Board and Branch Reference Manual

6. The Chair(s) recommends to the ED 3 to 5 names of individuals to review the information about the product, service, or point of view under consideration for endorsement.
7. The ED selects the successful appraisers based on the candidate qualities and criteria:
 - a) current CSHP membership
 - b) working in the area of interest related to the product, service, or point of view
 - c) extensive knowledge in the subject area
 - d) absence of conflict of interest with the product, service, or point of view
8. The Chair(s) forwards documents to the successful candidates.
9. The Chair of P3SC reviews the information about the product, service, or point of view and considers it in light of the committee's mandate. If the product, service, or point of view aligns with the committee's mandate, the chair then notifies the members of the P3SC to invite them to appraise the product, service, or point of view.
10. Clinical practice guidelines are evaluated using the most current AGREE instrument, available from: <http://www.agreetrust.org/>
11. A staff member (e.g., general office clerk) compiles the feedback received and forwards the compilation to the involved Chair(s) for review.
12. In the event that more than one Board, Committee, Task Force, or PSN is reviewing a product, service, or point of view with the purpose of informing CSHP's decision whether to endorse the product, service, or point of view, and there is disagreement on the recommended course of action, the participating Chairs meet via teleconference to reach a decision. In cases where consensus is not reached, endorsement is not be given.
13. The Chair informs the ED of his or her recommended course of action and provides evidence supporting the recommendation.
 - a) If the Chair recommends that CSHP not endorse the paper, the ED informs the Executive Committee of that decision. The ED (or designate) informs the requesting organisation and the relevant Chair regarding that decision. (The process stops at this point.)
 - b) If the Chair recommends that CSHP endorses the paper, the ED forwards the recommendation to the Executive Committee for consideration.
14. The Executive Committee considers if a recommendation should be submitted to the Board for decision.
 - a) If the Executive Committee decides to not submit a recommendation, the ED (or designate) informs the requesting organisation and the relevant Chair regarding that decision. (The process stops at this point.)
 - b) If a recommendation is submitted to the Board, the relevant Executive or Chair of the Committee submits a recommendation to the Board for decision. For instance, a recommendation from a PSN or a group of PSNs would be submitted by the Vision Liaison.
15. The Board considers the recommendation, seeking legal counsel when necessary.

CSHP Board and Branch Reference Manual

After the decision is made

16. The ED, or designate, notifies the requesting organization of CSHP's decision.
17. When the Board decides to endorse a product, service, or advocate for a point of view, the following steps are taken:
 - a) the requesting organization is notified of the following expectations or conditions associated with the endorsement:
 - i. that CSHP bears no legal or financial responsibility related to the endorsement, as that rests with the external organization or individual;
 - ii. that CSHP reserves the right to suspend or withdraw its endorsement at any time for any cause, including CSHP's reputation is tarnished through misuse or misunderstanding of the endorsement.
 - b) CSHP membership is informed about the endorsement (e.g., via the eBulletin) and the information about the endorsement is posted on CSHP's website.

Reviewing endorsement

1. Perform steps 5 to 16, as necessary.
2. If the Board decides to rescind the endorsement, the follow steps are taken:
 - a) the ED notifies the organisation of the decision and requests that the former endorsement be removed from the organization's current product, service, or point of view, including its website;
and
 - b) all current publications of CSHP (including its website) are updated to remove the endorsement.

RELATED POLICIES

Logo policy
Conflict of Interest policy