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**PCRS-UK Endorsement Policy**

1. **Purpose**

This policy is intended firstly to help guide decision-making about endorsements within the PCRS-UK and to help the PCRS-UK come to a logical, thought-out conclusion about whether or not to endorse a particular initiative based on a set of criteria.

Secondly it is intended to provide guidance to those seeking endorsement from the PCRS-UK in terms of what the PCRS-UK requires.

There may be exceptions not covered by this policy.

1. **Scope**

The policy deals with requests from both not-for-profit organisations and commercial companies. Among the initiatives the PCRS-UK might be asked to endorse are:

* + Conferences and other meetings
  + Guidelines
  + Books or other printed resources and publications
  + Web-based materials
  + Other Educational programs

The PCRS-UK does not, in general, consider requests to endorse commercial products. If there is a particular situation where PCRS-UK has been a collaborator or it is particularly innovative and addresses a need that has already been identified, the specific situation will be referred to the PCRS-UK Executive Committee and if appropriate to the trustees.

**Definition of endorsement**

In this document, endorsement is understood to mean overall support for an initiative or product, based on a thorough review, where the PCRS-UK has been involved in its development. In the case of programmes or educational resources, PCRS-UK endorsement implies that the PCRS-UK agrees with the information being communicated.

**Criteria for PCRS-UK endorsement**

* + The initiative must be compatible with the PCRS-UK business priorities and/or its charitable objectives. The initiative must be of relevance to primary care and respiratory care
  + The PCRS-UK will only consider requests for endorsement where one or more PCRS-UK representative have been involved with the initiative from the outset and contributed to its development. Any exceptions to this must be agreed by the PCRS-UK Executive Chair/CE.
  + There must be demonstrable benefit to the endorsing of an initiative. This may be a demonstrable benefit towards helping to achieve the PCRS-UK mission of achieving optimal respiratory health for all and/or to the PCRS-UK as an organisation (e.g. profile, reputation, income potential)
  + If the initiative is a tool that purports to have scientific credibility, all data regarding this should be supplied and subject to peer review
  + The PCRS-UK in general will only consider requests to endorse specific initiatives, not entire organisations
  + The PCRS-UK should be able to verify the credibility of the organisation seeking endorsement and the organisation should provide relevant information as requested
  + If appropriate, the organisation should be able to provide information about marketing and sponsorship of both the initiative and their organisation
  + The request for endorsement should define what is expected from the PCRS-UK and what PCRS-UK can expect from the organisation in return. This may include for example, publicity for the PCRS-UK and/or promotion of the PCRS-UK membership scheme
  + In the case of long-term endorsements (more than one year), the PCRS-UK will require periodic review of the materials/project, at an interval agreeable to both organisations
  + If the endorsement is for a publication, the PCRS-UK should see and approve the final artwork and this should be repeated if there is any agreement to any further print-runs or subsequent editions
  + If the endorsement is for a conference or meeting, the PCRS-UK should agree the programme and speakers for the meeting and approve all materials produced in relation to the meeting including slides and speaker briefing materials.

**Process**

* + Parties interested in securing PCRS-UK endorsement should contact PCRS-UK Operations Team via [info@pcrs-uk.org](mailto:info@pcrs-uk.org) with information on the proposed initiative. The Operations Team will acknowledge the enquiry and forward it to the Chief Executive (or deputy1) and/or Chair PCRS-UK Executive
  + The Chief Executive/deputy in conjunction with Chair PCRS-UK Executive (or relevant PCRS-UK Executive lead 2) will discuss the enquiry and decide whether it is a priority and compatible with PCRS-UK objectives/business plan
  + If the initiative is deemed a priority, the Chief Executive/deputy in conjunction with Chair PCRS-UK Executive (or relevant PCRS-UK lead 2) will:
    1. Identify a PCRS-UK clinical lead 3 with relevant expertise to represent PCRS-UK on the initiative (supported where appropriate by an advisory group/other PCRS-UK representatives 3) who will be responsible for making a recommendation as to the suitability of the final programme or initiative for PCRS-UK endorsement
    2. Identify an Executive lead 4 who will review and take responsibility for signing off the final materials recommended for endorsement, in conjunction with the CE/deputy, seeking advice from the PCRS-UK Executive and trustees as appropriate
    3. Ensure a written agreement is put in place setting out the terms of PCRS-UK‘s involvement including ownership of copyright/intellectual property, approval process/timescales and fees payable. This applies most specifically to requests from commercial companies
  + The PCRS-UK Executive and trustees will receive a report at each meeting on what endorsements have been granted
  + The Operations Team or Chief Executive/deputy will let the organisation know of the decision, and in the case of a positive decision, discuss how the PCRS-UK can support the initiative more broadly (e.g. promoting it to its members) and make any necessary arrangements involving use of the PCRS-UK name and logo.

1 Requests for endorsement should be forwarded as follows:

* Guidelines, NHS /policy documents: PCRS-UK Policy Consultant,
* Events, conferences, education programmes - PCRS-UK Development Director
* Activities specific to a single PCRS-UK region: PCRS-UK Development Director
* Other PCRS-UK CE

2 Requests for endorsement will be reviewed as follows

* Guidelines, NHS/policy documents: PCRS-UK Executive Policy Lead
* Nurse Events, conferences, education programmes: PCRS-UK Nurse Lead
* Other Events, conferences, education programmes: PCRS-UK Education Lead
* Activities specific to a single PCRS-UK region: PCRS-UK Regional Lead (for that region)
* Other: PCRS-UK Executive Chair

3 The clinical lead / other PCRS-UK representatives will be provided with a copy of PCRS-UK’s policy on representation.

4 The Executive lead should not be directly involved in the development of the programme (except in specific circumstances agreed by PCRS-UK Executive Chair / CE)

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**Updated: June 2009**

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**Reviewed / approved by PCRS-UK Trustees: April 2013**

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