STANDARD OPERATING PROCEDURES

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SIO | WASHINGTON, DC

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1 SIO Guiding Statement on Managing Conflicts of Interest and Risk of Commercial Bias and Marketing:

- SIO does not promote for-profit companies and seeks to maintain independence from commercial enterprise and marketing in all activities.

1.1 Standard Operating Procedures for Reporting and Managing Potential COIs

- Trustees of the Board and co-chairs of SIO Committees, Task Forces and Special Interest Groups will complete financial disclosure and conflict of interest forms. These forms will be updated on a yearly basis. Presenters of original SIO educational programming (webinars, annual conference, etc.) shall complete the form as part of the speaker confirmation process.

- The Board of Trustees (BOT) and/or Executive Committee (EC) shall review, on an annual basis, COI disclosure forms and undertake any further, more detailed review of any interests or relationships with potential to affect the integrity or the perception of integrity of SIO.

  o As needed, the BOT/EC shall appoint a review task force, which, after open and honest deliberation, will return recommendations for managing risk of bias and COI. The standards linked in SOP may be used as guidance when determining the level of impact a disclosed COI may have on aspects of SIO's operations, decisions, and goals, including avoiding legal or public issues which may detract or impede focus on SIO's mission.

Adopted by Board of Trustees 01-20-2022

1.2 COI Policy for SIO Members with Positions in or with For-Profit Entities

- SIO members with potential conflicts of interest due to positions in or with for-profit entities will be required to complete the COI disclosure form upon joining SIO, renewing membership, or prior to joining an SIO entity. Such members will also be required to sign the following statement: "As a member of SIO with potential conflicts of interest, I understand that the Society for Integrative Oncology (SIO) does not promote for-profit entities, and I agree that I will not market products or services to SIO members or offer gifts, money or monetary compensation to individual SIO members."
- As outlined in 1.1, the review task force will be responsible for any necessary review and decision regarding an individual SIO member's disclosure.

Adopted by Board of Trustees 07-19-2022

2 Selecting and Nominating SIO Board Members

2.1 Yearly Call for SIO Board Members

- A call for SIO Board Member nominees will be sent out via email to all SIO members and placed on the website February 1. Nominations will be open through April 30
    - Targeted emails, phone calls, etc. may also be sent, as deemed necessary and appropriate by the Nominating Committee
    - It will be the responsibility of the Nominating Committee to provide standard wording/content for the email solicitations and website request
- Nominations from the annual call will be open through April 30

2.2 Nomination and Approval Overview

- Trustees elected by members shall serve staggered terms of three years. Upon recommendation of the Executive Committee, a Trustee elected by the members may be re-elected for one additional three-year term. SIO Board Members will be nominated once per year for the terms up for election. SIO Board Members will be nominated once per year for the terms up for election.

- A general call will be made to the SIO membership February 1

- Individuals may nominate themselves or others as potential SIO Board Members

- Nomination made for others must be confirmed by that person within 2 weeks of the initial nomination

- All nominees need to supply their CV, conflict of interest and financial disclosure form (see 1.1) as well as a brief introductory paragraph or two stating their qualifications, availability, and vision while on the SIO Board

- All nominees will be sent a copy of Board Members Expectations, Roles and Responsibilities
    - All nomination materials (the introductory paragraph and the nominee's CV) need to be submitted by April 30

- SIO admin staff will electronically forward each nominee's materials (paragraph and CV) to SIO Executive Committee members by May 7

- The SIO Executive Committee will meet via teleconference by May 15 to discuss all nominees and vote to approve or disapprove. Unanimous approval will be necessary in order to move nominations forward.

- Nominations adopted by the Executive Committee will then be forwarded to the full SIO Board by May 31.

- Board members will review the nomination materials and cast a vote (approve or disapprove) via electronic voting system. Votes must be received by June 14.

- o Disapproval votes require a brief explanation
- o Nominees will need to receive the majority of votes (>50%) (per SIO Voting Policy) to be presented to SIO members as a Board Candidate
- The SIO Board candidates adopted by the SIO Board will have their materials emailed to all SIO members for a vote within 1-week of the annual meeting
- Membership voting is a procedural formality and a membership duty/benefit, and a majority of votes from the general membership is not required for approval of board candidates as SIO Board Members.
- The SIO admin staff will compile the Board's responses by June 21 and send summary to the Executive Board and full Board.
- By June 30, the SIO admin staff will send individualized letters signed by the SIO President to all nominees, those who have been approved to serve the Board and also those who were not approved. This letter will describe the in-person board retreat to take place immediately before the upcoming conference and will encourage the new board member to attend. Also attached will be a copy of the board member expectations and SOPs related to board attendance and participation at the conference.
- New SIO Board Members will be officially introduced to the SIO Membership at the business meeting at the SIO annual conference.

Amendment to remove requirement for membership vote of >50% yes, Approved July 21, 2022

3 Nominating and Choosing Executive Committee Members
3.1 Nomination and Approval Overview

- SIO Executive Committee Members will be nominated annually by the SIO Nominating Committee, excepting the President-President-Elect and Immediate Past President, whose terms may be two years in length
- The Nominating Committee is made up of the SIO President, immediate Past President and the President-Elect
- The SIO Nominating Committee will be responsible for nominating the Secretary, Treasurer, and President-Elect, as appropriate
- Choice of nominees is at the discretion of the Nominating Committee based on the needs, present and future, of SIO. However, several broad criteria will be applied to choosing potential nominees. These include:
  - o Provided substantial and sustained service to SIO, such as chairing an SIO conference, leading a committee or working group, being an active member of the Board— for at least two years
  - o Preference is given to those who have held leadership positions in other organizations.

- The Nominating Committee will discuss and identify potential changes and new members of the Executive Committee, to be done no later than June 1.

- The chair of the Nominating Committee (Immediate Past President) will then notify nominees.

  o Nominees need to confirm acceptance of nomination within 2 weeks of the initial email notification of nomination

  o If nominees decline or do not respond, the Nominating Committee will identify and invite new individual(s). Correspondence will follow similar processes as noted above until all of the roles of the Executive Board have been satisfied

- Confirmed nominees will be announced to the SIO Board at the next SIO Board meeting.

- Nominees will start their executive office at the close of the annual fall conference and be officially announced to the SIO membership during the business meeting at the Annual SIO Conference

3.2   Length of Office for Executive Committee & Board Members

- The President, President-Elect, and Past President may serve two-year terms for each role, with the President-Elect transitioning to President and the Past President transitioning off the Executive Board, occurring at the close of the annual conference.

- The Secretary and Treasurer will serve one-year terms. Terms officially begin and end at the close of the annual conference.

- Any Executive Committee member unable to complete their term of office will be replaced for the remainder of their term

- The process for replacing an Executive Committee member is the same as outlined above with the exception that:

- The nominee take office as an Executive Committee member directly upon accepting a nomination and not at the annual meeting

- The nominee only completes the remainder of the term for whom he/she is replacing

- Executive Committee memberships are not renewable

3.3   Executive Committee Meeting Agenda Items

- Timely Submission of Requests for EC Approval:

  o Submissions for EC consideration and/or approval shall be submitted to management staff, Secretary, or EC member in writing; management staff shall supply these submissions to EC one week prior to EC meeting to give EC time to review before discussing. Items submitted after this deadline shall be considered at the next scheduled EC meeting.

4 Developing and Approving Annual Operating and Conference Budgets

4.1 Budget Overview

- The Operating Budget and the Conference Budget will be separate. Conference Profit/Loss will be listed as Income/Expense in the Operating Budget.

4.2 Operating Budget

- The SIO Operating Budget will be for the calendar year: January 1 – December 31.

- The SIO Finance Committee will develop an annual operating budget to be adopted by the SIO Board during the annual pre-conference retreat, usually held in the Fall of the preceding year. The SIO Board will receive the budget in advance of the meeting for their review.

- Prior to the annual pre-conference retreat, the budget will be presented to and discussed with the Executive Committee Board for guidance and refinement.

- Throughout the year, the Treasurer and staff designee will provide quarterly reports to the Executive Board during Board Meetings on the status of SIO finances in relationship to the approved Operating Budget. These reports will be provided based on the following schedule:

Quarter	Report Period	Report Due
1	January 1 through March 31	April 30
2	April 1 through June 30	July 31
3	July 1 through September 30	October 31
4	October 1 through December 31	January 31

4.3 Conference Budget

- Prior to a conference site being adopted by the SIO Executive Committee, a Conference Budget will be drafted and developed by the staff designee and the Conference Chair.

- The Conference Budget will be developed and approved 18-24 months in advance of the conference.

- Throughout the year, the Treasurer and staff designee will provide reports to the Executive Board on the status of SIO finances in relationship to the approved Conference Budget based on the following schedule:

Report	Report Period	Report Due
1	January 1 through April 30	May 30
2	May 1 through August 31	September 30
3	September 1 through December 31	January 31

5   Choosing Annual Conference Location

5.1   General

- The Society for Integrative Oncology (SIO) holds an annual conference.

- The Executive Committee prioritizes and selects potential conference locations 30 months (2.5 years) in advance of the annual conference. If desired, a general request for proposals to the SIO membership can be made.

- The Executive Committee selects prospective conference locations 30 months in advance of the annual conference based on the following:
  - Local Support and Advocates
  - Desired Geographic Location
  - Venue Capacity
  - Desired Demographic Location for SIO Outreach
  - Desired Professional Location for SIO Outreach
  - Travel (local airport) and Hotel Accommodations (at least one major hotel)

- The SIO administrative staff will then submit requests for proposals to each of the prospective conference locations based on the Executive Board's recommendations.

- Proposals shall be completed by each prospective conference location coordinator and returned to the Executive Director no later than 28 months prior to the conference.

- No later than 26 months prior to the conference, a copy of each proposal will be circulated to the Executive Board for review who will then vote on 1-3 of the top/best conference locations and proposals based on the following desired criteria:
  - Local Support and Advocates
  - Desired Geographic Location
  - Financially Feasible (within projected budget)
  - Venue Capacity
  - Desired Demographic Location for SIO Outreach
  - Desired Professional Location for SIO Outreach
  - Travel (local airport) and Hotel Accommodations
  - Academic host commitment and leadership
  - Host Assets, Resources, and Conference Planning
  - Proposed dates

- 1-3 of the highest ranked proposals which meet the criteria as outlined above will be discussed and determined by means of vote by the Full Board of Directors at the Annual

Pre-Conference Board Retreat. The location that receives the most favorable amount of votes shall be chosen as the Annual Conference Location.

- Upon choosing a conference location, the SIO administrative staff shall inform the highest ranked location of SIO's acceptance of their proposal and obtain a written Conference Agreement to be signed by both parties

5.2   Conference Location Planning Timeline

30 months out	Executive Committee Board prioritizes and selects potential conference locations and selects 3-5 prospective conference locations to request proposals from
30 months out	Executive Director submits requests for proposals to each prospective conference location
28 months out	Proposals to be returned to Executive Director and circulated to the Executive Committee Board for review and votes on 1-3 top/best conference locations
26 months out	Votes on 1-3 top/best conference locations must be made
24 months out	Top 1-3 locations/proposals will be discussed and determined by means of vote by the Full Board of Directors at the Annual Pre-Conference Board Retreat. The location which receives the most amount of votes shall be chosen as the Annual Conference Location.
24 months out	Accept Proposal and obtain Host Agreement

6   Conference Travel and Sponsorship Policies

6.1   General

- The Society for Integrative Oncology (SIO) holds its annual conference once per year.

- The Scientific Program Committee prepares a list of potential invited speakers to match the conference theme and annual conference budget, considering the cost of travel and registration for speakers.

- Two SIO staff will have all travel expenses reimbursed and receive a complimentary registration. The following are not offered reimbursement for travel or registration expenses:

  o Current Executive Board Members

  o Past Presidents

  o Current Board Members

  o Scientific Program Committee Members

  o Session Moderators

  o Selected Abstract Presenters

- o Selected Poster Presenters
  - ▪ The following will receive a complimentary conference registration:
    - o Conference Chair
    - o Local Conference Chair
  - ▪ The following will receive a complimentary registration and reimbursement for travel (one coach round trip airfare, up to $100 ground transportation, and one night's hotel at the conference hotel):
    - o Invited Plenary Session Speakers (those who are not Board or Scientific Program Committee Members)
    - o Keynote speakers
    - o Additionally keynote speakers will be offered $1,000 honorarium and one extra night's accommodation, as needed. Higher honorariums may be provided if sponsorship is received specifically to support lecturer honorarium.
  - ▪ The following will receive a complimentary hotel room pending availability from the complimentary rooms offered as part of the hotel contract:
    - o SIO Staff
    - o Conference Chair
    - o Traveling Keynote Speakers (those who are not board members)

6.2 Managing Potential Speaker Conflicts of Interest

- ▪ In considering which speakers to invite, the Conference Planning Committee shall seek to invite presenters with minimal or no potential conflicts of interest or for-profit financial relationships
- ▪ Per SOPs 1.1 and 6.4, conference presenters shall submit an SIO or ACCME (if CME is being offered) conflict of interest form

6.3 Review of Potential Exhibitors

- ▪ Potential exhibitors shall be screened by SIO staff for any FDA warnings, violations, and the like.
- ▪ This information shall be provided to the Executive Committee to aid in review.
- ▪ Exhibitors' mission, products and/or services shall be congruent with the mission of SIO.
- ▪ If there are no significant problems identified, then the exhibitor shall be accepted and shall be notified of acceptance.
- ▪ Exhibitors shall be provided with information, including the statements below, that only evidence-based claims may be presented by those exhibiting, and that the following may result in the lost privilege to support future SIO conferences:

- o Exhibitors found providing claims other than evidence-based claims to conference delegates.
- o Exhibitors found to be actively investigated by an oversight agency.
- o Exhibitors found to be out of compliance by an oversight agency.
  - This information will be provided in writing in the conference prospectus, exhibitor service kit and at the conference.

6.4 Acknowledgement of Supporters and Exhibitors

- Placement of recognition information will be in accordance with standards of the Accreditation Council for Continuing Medical Education (ACCME) to maintain appropriate independence and distinction of educational programming and recognition of supporters. See below for such ACCME provisions
- Levels for support and benefits will be provided in the conference support prospectus
- Recognition of supporters of the SIO international conferences will include:
  - o Designation on the SIO conference web site, in accordance with ACME standards
  - o Designation on cards distributed at the registration area at the conference
- Supporters do not have the option of designating speakers

6.5 Continuing Medical Education (CME) Standards

- SIO CME credit offerings will adhere to the Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence in Accredited Continuing Education.

6.6 Commercial Exhibits and Advertisements

- Commercial exhibits and advertisements are promotional activities and not continuing medical education. Therefore, monies paid by commercial interests to providers for these promotional activities are not considered to be commercial support. However, accredited providers are expected to fulfill the requirements of 5.4 and to use sound fiscal and business practices with respect to promotional activities.
- *5. 1-4 Standard Operating Procedures Update Approved October 3, 2014. Updated link approved November 18, 2021.*

7 Approving Contracts Policy

7.1 Review and Approval of Contracts

- All contracts will first be reviewed by the SIO Finance Committee (Treasurer, Past Treasurer, President, President Elect, and Board Member as appointed). The Finance Committee will send any recommendations and associated information to the appropriate SIO body based on the annual amount of the contract:

- o Contracts which are less than $15,000 per year need to be adopted by the SIO President and Treasurer

- o Contracts which are greater than or equal to $15,000 per year need to be reviewed and adopted by the SIO Executive Board

- Approvals of contracts will be recorded into either SIO Executive or Finance Committee minutes, as appropriate.

8 Voting Policy

8.1 General

- When indicated, SIO policy and proposal decisions will be finalized via a vote to the entire membership or to the board.

8.2 Proposals to be voted on by the entire membership:

- Requirements for voting body: For a proposal to be adopted by the entire membership it requires a 20% quorum (i.e., 20% of the membership) based on the current membership. Memberships will be verified, and a confirmed member will be defined as a member who was a member at least one day before the vote took place.

- Requirements for passing: To have a proposal pass it needs a simple majority.

8.3 Proposals to be voted on by the SIO board:

- Requirements for voting body: For a proposal to be adopted by the board, it requires a 50% quorum (i.e., 50% of the board) based on current board membership. Quorum taken by the SIO Board is defined as 50% or more

- Requirements for passing: To have a proposal pass it needs a simple majority. A vote may be a "yes," "no" or "abstain." Abstentions count towards quorum not as a "yes" or "no" vote.

9 Financial Policies

9.1 Finance Committee

- Purpose: The committee provides financial oversight of the Society and provides advice and counsel to the Board of Trustees on financial matters. The Committee proposes the annual budget to the Board and consults on strategic issues with financial implications.

- Committee Membership: Membership of the committee shall include the treasurer, president, and president elect.

- Role of Chair: The Society Treasurer serves as the chair of the Finance Committee. The role of the chair is to:

- o Report to the board at each board meeting on the status of the Society's finances and makes financial information available to the board members and the public.

- o Work with the management staff to:

- approve accounts payable on a monthly basis
- ensure appropriate financial reports are made available to the board on a timely basis; and
- assist in the preparation of the annual budget.
- Consult with leadership on programs and services which impact the budget
- Report to the membership at the annual meeting the financial status of the Society.
  - Role of Committee members:
    - Attend via conference call or in person the meetings called by the chair.
    - Review all financial reports in sufficient time to provide thoughtful feedback to the staff and committee regarding the Society's financial position.
    - Monitor expenditures and income, usually through monthly financial statements.
    - Monitor the Society's investments.
  - *Adopted by Board of Trustees October 19, 2013*

9.2 Accounts Payable Procedures

- As invoices are received, they are coded to proper account by team leader and provided to bookkeeper.
- On or about the 15th of each month, the bookkeeper will prepare an accounts payable report – a listing of all invoices and expenses to be paid, including scans of all invoices and receipts for reimbursement.
  - The monthly accounts payable report will include, listing of all purchases made with any credit/debit cards held on SIO accounts complete with copies of receipts for all payments unless said payments are pre-adopted by the treasurer as regular recurring payments.
- Team leader will forward to the treasurer an electronic copy of the accounts payable report and save an electronic copy to the SIO files.
- Treasurer will, within 5 business days, review the Accounts Payable Report. Following review, the treasurer will alert the management team leader via email what accounts are released to be paid.
- Team leader will expedite responses to any questions from the treasurer and, upon receipt of approval, communicate with the treasurer regarding approved payments.
- Upon notice from the team leader that accounts have been approved for payment, bookkeeper will process all payments. Payments may be made via electronic bill payment or check.

- Upon written approval of the treasurer, repetitive accounts payable (consistent amounts due at regular intervals for consistently delivered goods and services) may be set up as automatic payments but will be recorded on monthly reports and reviewed at least annually.

9.3 Expense Approval

- Expenses up to $200 may be adopted by management or a member of the executive board.

- Expenses in the range of $200 to $1000 must be adopted by two of the following:
  - President
  - President Elect
  - Treasurer

- Expenses above $1000 must be pre-adopted by the Executive Board.

- *Adopted by Board of Trustees October 19, 2013*

9.4 Open Access Publication Funding

These SOPs shall govern the awarding of funds for open access publications for a period of two years from this approval on 06-11-2021. On or before 06-11-2023, the Executive Committee shall review this process, along with financial data, and continue, modify, or discontinue this funding program.

- Each year, SIO will consider applications to grant up to 2,000 USD for each open access publication up to an <u>annual expenditure of USD 10,000</u> (5+open access publications), according to the annual budget. Research publications shall meet the following criteria:
  - Applicant is an SIO member in good standing, and the principal investigator (PI) or Co-PI of the research and author/co-author of the publication to be considered
  - Applicant (and co-authors, if applicable) shall remit to SIO any amount in excess of the 2,000 USD due the publishing journal.
  - Research was conducted by SIO members as part of an SIO committee, TF or SIG
  - Publishing journal is peer-reviewed and indexed in PubMed
  - The research project aligns with SIO's mission and adds to SIO's position as leader in the field of evidence-informed integrative oncology
- Applicants must give notice to the SIO Executive Committee in advance of application (intent to apply)
- SIO Finance Committee and/or Executive Committee will receive applications, and make decisions to award or deny funds
- Donation category for open access publication will be set up on the SIO website, announced, and promoted.
- An application form to request SIO support for open access funding will be uploaded to the website.

- Payment procedure: Awardee will submit required details to management company; management company will remit the total amount required for open access publication due the journal; awardee and co-author and/or research team members will remit payment to SIO

(Adopted July 15, 2021)

9.5 SIO Entity Budget Requests

- As the SIO budget allows, an annual amount will be used as an internal fund for projects initiated and led by SIO entity co-chairs and their members.

- At the beginning of each calendar year, the Treasurer will announce the total funding available, and invite co-chairs of committees, task forces and SIGs to apply for funding for projects that advance the entity's purpose and goal as declared in the entity's Terms of Reference document and that also advance the mission and goals of SIO.

- To submit a valid application for funding, the entity must have an approved Terms of Reference on file.

- The application document submitted must include the name of the SIO entity, names of co-chairs and members, description, aims, timeline, designated roles and responsibilities, and estimated cost of the initiative or project to be funded. Applications for collaborative projects involving two or more entities will also be considered.

- Co-chairs of SIO entities are encouraged to include a proposed budget with each annual Board Retreat report.

- The application document may be submitted via the entity's assigned management staff member to the management director or staff assigned to the Executive Committee (EC).

- Applications will be reviewed by the Finance Committee within 30 days of submission to management staff and the decision (approved for funding, returned with comments and questions for resubmission, or declined).

- Following the review of the applications, the Finance Committee will make recommendations to the Executive Committee during the year-end budgeting process. The Executive Committee will have final approval.

- Results of the applications and funding will be communicated to the co-chairs of the applying entity.

- During the remainder of the year, there will be an opportunity to request funding on an ad hoc basis. Applications as part of an annual budgeting process are encouraged.

10 Committee Co-Chair Policy

- All committees will have two co-chairs

- SIO co-chairs will serve for staggered two-year terms

- SIO co-chairs must be SIO members in good standing and place an annual updated conflict of interest form on file per 1.1

- SIO co-chairs must have been a member of the committee they are chairing for at least one year

- SIO co-chairs can only serve as a co-chair on one committee at any given time

- We will elect one co-chair each year to help mentor the new incoming SIO co-chair

- The more senior co-chair will serve on the SIO Board of Directors as an ex officio member (unless already a board member then he/she will continue their role as a full voting member of the board)

- SIO co-chair election, as appropriate, will occur just prior to the SIO Annual Meeting and be announced at both the first scheduled SIO committee meeting and during the SIO Annual Meeting.

- These elections will occur via email, which will be sent to all members of the designated committee. Committee members will have one week to vote. Whoever receives the most votes become the next elected SIO co-chair

    o Nominations (self and other) for SIO co-chair will be solicited prior to the SIO Annual Meeting

    o Nominees will be asked to submit a brief paragraph explaining their qualifications and why they would like to be SIO chair or co-chair. All nominees will be submitted to and adopted by the SIO Executive Committee prior to the election

- *Adopted by Board of Trustees, December 6, 2013*

11 Special Interest Groups (SIGs)

11.1 General

- The Board of Trustees, from time to time, may create special interest groups (SIGs), designed to facilitate members' sharing studies, information, and activities within the particular interest areas of the groups. The purpose and activity of such SIGs must be consistent with the mission of SIO.

11.2 Creation of SIGs

- Membership in SIGs is restricted to members of SIO; members may select more than one SIG.

- To seek creation of a SIG, an application must be submitted by a group of 5 or more SIO members to the Board of Trustees. The application must describe the subject area of the proposed SIG and an activity plan, operating procedures, and Chair and Chair-elect, all subject to Board review and approval. Co-chairs shall place on file and update annually their conflict of interest forms per 1.1.

- The Chair-Elect is expected to become the Chair of the SIG. The term limit for the Chair is between two and four years (i.e., two terms), with a single two-year term encouraged.

- The Board shall review the application on the bases of relevance to SIO interests and needs, uniqueness of the special interest area to be addressed, and potential ability of the proposed SIG to recruit and maintain an active membership.

11.3 SIG Responsibilities

- Each SIG must conduct an annual planning/business meeting at the SIO annual conference and present the annual activities report for the year and plans for the year ahead.

- Each SIG must submit to the Board the following documents: minutes of meetings during the year and annual activities plan and annual activities report at SIO's annual conference.

- A SIG may not express a position in its own name.

11.4 Dissolution

- Given that subject areas, needs and activity levels may change with time, a SIG may be dissolved by the Board, with the following considerations:

  - Recommendations for dissolution may come from the SIG's leadership, members, or Board, but the final decision will be made by the Board

  - Reasons for dissolution to be considered may include but are not limited to lack of activity by the SIG for one or more years; the special interest area is no longer valid; SIG is unable to maintain membership at the minimally acceptable levels (at least five members not counting the two co-chairs); the SIG's efforts are duplicated or closely matched by another SIG.

  - Once a decision is made for dissolution, the SIG will be so notified and given a termination date.

- *Adopted by Board of Trustees, August 20, 2016; Edits adopted 01-20-2022*

12 Communications Postings

12.1 General

- SIO will post relevant information submitted by members on its website on a regular basis.

- There will be sections entitled "Studies open to recruitment"; "Grant opportunities", "Educational Resources – Providers", and" Educational Resources – Patients."

- Members wishing to post items can submit a request to the executive committee through an executive member or the management company (staff), which will include the desired wording of the post and a web link.

- The VP of Communications and one other EC member with medical training will review and approve or decline each request as they are submitted.

- Criteria followed include: (a) relevant to SIO members; (b) not advertising a for-profit business (see 1.1); (c) accurate and consistent with available research evidence; (d) no other conflicts of interest identified.

- The start and end dates of each posting will also be decided by the VP Communications and one other EC member as above upon review.

- Relevant items for these categories may also be identified by the management company (staff) or EC independently. The same approval process will be followed.

- *Adopted by Executive Committee, January 12, 2018*

12.2 Approval Required (Table)

Action (least to greatest commitment)	Who must approve?
Retweeting, sharing from SIO social media account posts by EC members in which @integrativeonc is tagged	No additional approval necessary if from EC member; other SIO members' tagged posts require Communications Co-Chair approval
Content in an original social media post	Communications Committee Co-Chair
Content for mention in SIO Newswire	EC member (President or Secretary)
Content in special eBlast sent to SIO members	EC member (President or Secretary)
Placement of SIO logo/link on another entity's website, social media	EC
Announcement of partnership with SIO	EC, Board

12.3 Member Postings

- SIO will post relevant information submitted by members on its website on a regular basis upon review and within the criteria set forth in this SOP.

- There will be sections entitled "Studies open to recruitment"; "Grant opportunities", "Educational Resources including training program – Providers" and "Educational Resources including training program – Patients."

- Members wishing to post items can submit a request to the Executive Committee (EC) through an executive member or the management company, which will include the desired wording of the post and a web link.

- The Communications Committee Chair and one other EC member with medical training will review and approve or decline each request as they are submitted.

- Criteria followed shall include: a) relevant to SIO members; b) not advertising a for-profit business; c) accurate and consistent with available research evidence relevant to the posting material i.e., evidence based; d) no other conflicts of interest identified.

- The start and end dates of each posting will also be decided by the Communications Committee Chair and one other EC member as above upon review.

- Relevant items for these categories may also be identified by the management company or EC independently. The same approval process will be followed.

- SIO shall note a disclaimer that the information and perspectives represent those of the entity and not necessarily those of SIO.

- *Adopted by Board of Trustees, March 13, 2019*

12.4 Social Media Posting Guidelines

- Monthly SIO Social Media Content Guidelines:
  - SIO Committees, Task Force and Special Interest Groups are encouraged to submit content for two to five social media posts each month for SIO Facebook, LinkedIn, and/or Twitter accounts (and eventually YouTube, Instagram).
  - Proposed content shall
    - a) contain a web link (URL) and brief description of material to be shared
    - b) list appropriate hashtags and "@XYZ" to promote reposting
    - c) adhere to the same criteria mentioned above (relevant to SIO members; not advertising a for-profit business; accurate and consistent with available research evidence relevant to the posting material, i.e., evidence based, and no other conflicts of interest identified).
  - Content is to be submitted to Communications Chair, Co-Chair for approval.
  - Deadline for submission of content shall be the second Monday of the month (e.g., 2nd Monday in March deadline for submitting content for April).
  - Facebook and LinkedIn posts shall be limited to a paragraph; Twitter posts shall adhere to the 280-character limit.
  - Once approved, social media content will be sent to appropriate management company office staff for scheduling.
- Retweeting and Sharing Social Media Posts from non-SIO Accounts:

- Management company staff managing SIO social media accounts shall adhere to the same criteria and guidelines offered above: a) relevant to SIO members; b) not advertising a for-profit business; c) accurate and consistent with available research evidence relevant to the posting material, i.e., evidence based; d) no other conflicts of interest identified. Posts highlighting the work of SIO members, for example, represent good candidates for sharing.

- Special COVID-19 pandemic considerations: Social media content to be reposted or shared by those in charge of SIO social media accounts shall a) be factual and from reputable sources; b) not be alarmist or contribute to panic; c) be non-partisan and non-political; d) highlight what is working in the field of integrative oncology during COVID-19 pandemic– see definition* below; e) maintain and promote the highest standards of professionalism worthy of SIO's mission and goals.
  > * Integrative oncology is a patient-centered, evidence-informed field of cancer care that utilizes mind and body practices, natural products, and/or lifestyle modifications from different traditions alongside conventional cancer treatments. Integrative oncology aims to optimize health, quality of life, and clinical outcomes across the cancer care continuum and to empower people to prevent cancer and become active participants before, during, and beyond cancer treatment. *-Claudia Witt et al, JNCI Monographs, Vol2017, Issue 52*

- *Adopted by Board of Trustees, November 19, 2020/link added 09-02-2021 by Secretary*

12.5 SOP for adding content to the existing structure of SIO website

- SIO Board of Trustees and SIO Entity Co-chairs may submit a document containing additional content or edits to existing content for review, approval and posting to an existing page or link on the SIO website. An online form will be created for the purpose of adding or editing content to the existing SIO website structure. The document with proposed content may be submitted to a Communications Committee Co-Chairs and/or members of the Executive Committee.
- The completed form will be reviewed by Communications Committee Co-Chairs and discussed as needed with the full committee and/or the Executive Committee. Proposed content will be approved, rejected, or returned for edits and resubmission.

12.6 Restructuring or reorganizing SIO website content

- Trustees of the Board, Executive Committee members, or co-chairs of SIO entities may submit a document containing proposed restructuring or reorganizing of the SIO website to the Executive Committee and the Communications Committee Co-Chairs.
- The Executive Committee will confer with SIO's management company regarding assessment of any additional fees or expenses to the Society.
- Management company staff will disclose any costs to the EC as well as a timeline for completion of the work proposed.

- o Proposals will be assessed by the impact of the proposed improvement, effort and time involved, costs incurred, and availability of Communications Committee members, management staff, and proposing members to execute the plan.
- o If needed, the Communications Committee Co-Chairs may assign this proposal to a Website Task Force which will report to the Committee's co-chairs.
- o The Executive Committee must approve the proposal, any associated expenses, and the timeline by which it shall be enacted.

Adopted by Board of Trustees, July 21, 2022

13 Designation and Review of SIO Entities

13.1 General

- SIO entities may be created to undertake certain projects and procedures. These entities may include standing committees, other (special) committees, task forces, and advisory councils. [SIO also may create special interest groups (SIGs) from time to time and the protocol for doing so is set forth separately on page 17] The type of entity chosen will be based on the nature of the role set out for them, as determined by the factors set forth below.

13.2 Committee

- Committees: An SIO entity will be designated as a committee if its role is to focus on general tasks that require ongoing attention (e.g., communication, clinical practice, research, as well as the operational functions of the organization.

  - o Standing committee: Committees with operational functions, such as finance, nominating and executive, are considered standing committees under the Bylaws.

  - o Special committees: The Bylaws provide for the creation of other committees, e.g., communications, etc.)

13.3 Task Forces

- Task forces: Entities intended to address specific concerns that can be achieved in a relatively short period of time or on an as needed basis may be deemed to be task forces. Typically comprising experts in specified areas of knowledge or practice, task forces are small groups of people—and resources—brought together to accomplish a specific objective, with the expectation that the group will disband when the objective has been completed. Co-chairs of task forces must place on file and update annually their conflict of interest form per 1.1.

- Advisory councils: Councils may be established to assist the Board and Executive Committee in carrying out their work by providing expertise and advice in selected areas, such as the council consisting of past presidents.

13.4 Stated Purpose

- A stated purpose with the nature and scope of work shall be developed for each committee, task force and advisory council, upon its creation.

- The stated purpose is subject to modification as noted in the provision for review, set forth below.

13.5 Review

- The Executive Committee shall conduct a review annually, at a time set by the EC, of the accomplishments of each SIO entity in the past year within its stated purpose and scope, as well as the entity's plans for the coming year. Chairs/Co-Chairs of the entities will be requested to submit a report of accomplishments and plans

- An SIO entity also has the opportunity to seek a modification of the type of entity and/or its stated purpose/scope. Such requests, which should be made by the Chair/Co-Chairs to the EC, shall include information that this change is requested by vote of the entity.

- This review will include such consideration of whether the entity has completed its stated purpose, whether the designated type of entity remain appropriate, or a change is needed, e.g., task force to special committee, whether the stated purpose/scope should be modified, and whether modifications should be made in the plans for consistency with the stated purpose and mission and strategic needs of SIO. This review will be shared with the entity leadership, which will be invited to provide feedback.

- Modifications require the action of the creator of the entity, e.g., Board, Executive Committee.

- *Adopted by Board of Trustees, May 17, 2019*

14 Terms of Reference

14.1 General

- Each SIO Committee, Task Force and SIG (see below for SIGs) shall draft and approve its own TOR, as outlined by the following guidelines:
    - Purpose: State purpose, mission, or goal of this entity; describing its function and responsibilities within SIO
    - Membership: State adherence to SIO Co-Chairs SOPs, qualifications for membership, minimum contributions to continue as member of this Committee or TF and length of terms of service, if any
    - Executive Committee (EC) Liaison: Each Committee and TF include an EC member as liaison to SIO Leadership for purposes of oversight and general governance
    - Meetings: State frequency of meetings, manner held (virtual conference call), anticipated in-person meetings per year (e.g., annual conference), agenda and minutes creation and circulation
    - Reporting: State how, when and to whom the Co-Chairs will report to SIO Leadership (e.g., After each meeting, Co-Chairs will send a report via email to Executive Committee; Co-Chairs will attend scheduled Co-Chair meetings)

- o Adding new members: State how new members will be added, and how requests to join will be processed, reviewed, and granted or denied in consultation with SIO President and/or the Committee's EC liaison

  - o Onboarding: Incoming members shall be provided with a welcome packet which includes SIO bylaws, SOPs, organizational chart, list of membership benefits, and SIO social media handles/accounts with encouragement to share, repost, and comment

14.2 SIG Terms of Reference

- Each Special Interest Group (SIG) shall draft and approve its own TOR, as outlined by the following guidelines:

  - o Purpose: State purpose, mission, or goal of this entity; describing its function and responsibilities within SIO

  - o Oversight: Each SIG shall be guided and overseen by the SIG Development TF

  - o Membership: SIG membership is open to all SIO members in good standing as a benefit of membership so term limits do not apply; however, for committees formed within SIGs, minimum qualifications for membership, minimum contributions, and length of terms of service shall be stated in the SIG's TOR

  - o Meetings: State frequency of meetings, manner held (virtual conference call), anticipated in-person meetings per year (e.g., annual conference), agenda and minutes creation and circulation

    - Reporting: State how, when and to whom the Co-Chairs will report to SIO Leadership (e.g., After each meeting, Co-Chairs will send a report via email to Executive Committee; Co-Chairs will attend scheduled Co-Chair meetings)

    - Adding new members: State how new members will be added, and how requests to join will be processed, reviewed, and granted

    - Onboarding: Incoming members shall be provided with a welcome packet which includes SIO bylaws, SOPs, organizational chart, list of membership benefits, and SIO social media handles/accounts with encouragement to share, repost, and comment

- *Adopted by Board of Trustees, November 19, 2020*

15 Survey Requests

15.1 General

- The Society for Integrative Oncology (SIO) receives requests to distribute surveys to its members. Requests are submitted: (1) internally by SIO committees, task forces, special interest groups and other entities; and (2) by external sources.

- This standard operating procedure (SOP) has been developed to provide guidance for those making such requests and to facilitate a consistent and objective process for review and decision-making.

- All proposed surveys, internal and external, must be submitted for review to the SIO Executive Committee, as set forth below. The content and purpose must be consistent with SIO's mission and values. Applicants must complete the Survey Request Application, including describing the need for the survey, explaining how the results will be used, and agreeing to provide SIO with a copy of the results. A copy of the proposed survey must be provided with the application.

15.2 Internal Requests

- Internal requests are those made by SIO committees, task forces, Special Interest Groups and other SIO entities. In addition to completion of the Survey Request Application and copy of the proposed survey, SIO entities must include a statement that the proposed survey has been reviewed and adopted by the SIO entity's membership and that approval includes the position that a survey of full membership is warranted.

15.3 External Requests

- External requests are defined as those being made by other than the internal sources in (1) as described above. This survey process is not available to commercial entities and cannot be used for commercial purposes. If approved, a survey and its results do not constitute SIO endorsement unless specifically provided.

15.4 Review Process

- The application and related material shall be submitted to the SIO Executive Committee for its review and determination. Factors shall include but not be limited to the survey's relevance to the SIO mission; coordination with surveys and projects of SIO and its entities; and whether the survey is considered an appropriate use of SIO resources and its members' time in completing the questionnaire.

- With respect to internal requests, review considerations may include whether the questions can be combined into an overall SIO survey or with the questions of another SIO entity.

- The Executive Committee will inform the requester of its decision within thirty (30) days. The decision may be approval, denial, or the opportunity to resubmit. Given multiple requests, timing of survey release is at SO's discretion.

- *Adopted by Board of Trustees, May 17, 2019*

The SIO Standard Operating Procedures document was written by SIO presidents, primarily Dr. Suzanna Zick, and is a living document. Amendments are approved by the Executive Committee and then the Board of Trustees. Since 2020, Jodi MacLeod has tracked changes in the document.