

Tips for Applying for Educational Grants

Make your grant request stand out.

What is unique about this activity? What is the practice gap you're trying to fill with this activity?

Needs Assessment / Gap Analysis.

Make sure your activity is designed to address professional practice gaps – a gap exists when an individual is doing or accomplishing something that differs from what is desired or achievable (i.e., the gap is what they are actually doing vs. what they should be doing better). Gaps should be competence, performance or patient outcome based.

Make sure your needs assessment is based on *specific data of the target audience and avoid broad, generic data*. For example, a broad gap would be "hypertension continues to go under-diagnosed and undertreated". A more specific (and improved) gap would be "a review of patient charts found that while rural healthcare practitioners in Michigan are checking 80% of patients' blood pressure, only 20% of patients receive the recommended treatment".

Learning Objectives.

Make sure your learning objectives are appropriately focused on the identified gaps. For example, using the above needs assessment example, appropriate learning objectives would include "review and discuss appropriate hypertension treatments" and "apply recommended treatments to hypertensive patients".

Educational Format.

Incorporate formats that are 1) effective in achieving the objectives, 2) innovative and/or curriculum-based (i.e., multiple activities in different formats (live plus online) vs. one-time only meeting), and 3) designed to enhance change in learners.

Faculty.

Do not include faculty names in grant submissions unless required to do so by the company. Some companies will decline a grant if the identified faculty have been promotional speakers for their company during the previous 12 months.

Content.

Make sure the company you are applying to has available funding for the therapeutic area of your initiative. If the company does not list your content area, do not apply. Also, make sure the content of your activity does not solely focus on discussion of off-label (non-FDA approved) uses.

Location.

Be careful of using venues with "resort" in the name. Some companies will not fund activities that are held at a resort location, even if the agenda is designed so that education is the main focus of the activity (i.e., limited potential for social events).

Outcomes.

Funders prefer to fund activities that are designed to achieve a minimum of level 4 (competence/self-reported intent-to-change) outcomes. Beaumont CME currently incorporates a minimum of level 5 (performance/self-report changes in practice) outcomes in all activities we certify.

Budget.

Be fiscally responsible. Do not overinflate fees or include large lump sums for fees or expenses (i.e., break out food costs into per meal, per person; break out honoraria into per person fees). Do not include 'entertainment'/'social' related expenses as several regulatory agencies forbid companies from funding non-educational expenses. Do not include expenses to support travel, registration, parking or lodging expenses for activity attendees (learners).

1. Honor each company's submission lead times and required information.

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2. Do not submit grant requests for exhibiting or advertising opportunities.
3. Do not offer anything in exchange for the educational grant (no quid pro quo).

Who is the CME Provider?

The official CME Provider is Beaumont Health. Note: Grant checks can be made payable to the department presenting the activity, but the CME Provider must be listed as Beaumont Health.

Who is the Educational Partner?

When Beaumont works with an organization that is not affiliated with Beaumont in any way, then the organization (aka joint/co-sponsor) must be listed as Educational Partner. If the activity is directly sponsored (no outside involvement), then this field will be "N/A" or left blank.

What if a company is providing an educational grant AND an exhibit/display fee?

Exhibits are considered promotional and therefore exhibit funds cannot be included as part of the educational grant. The actual grant agreement amount must not include the exhibit funds. See also "CME Guidelines Related to Educational Grants and Exhibit Space".

What documentation does the Beaumont Department of CME require?

The following documents must be provided to the Department of CME following grant request submissions:

1. Actual grant request and any additional materials included with the grant request submission
2. Preliminary budget detailing how the grant funds will to be spent

Once a company has approved your request for an educational grant, a letter of agreement must be signed by the Department of CME and the company providing the funds.

Who is authorized to sign grant LOAs for Beaumont CME activities?

LOAs can only be **signed by the Beaumont Department of CME**; we must review and approve all Beaumont CME grants to ensure compliance.

Which agreement should be signed...Beaumont's or the Company's?

Beaumont CME has a grant LOA template that can be signed. However, if a company requires their own LOA be signed, Beaumont CME will sign it if it meets our grants and contracts standards. Only one signed LOA per company per activity can exist.

What if the company requires me to accept the terms of their agreement online?

Terms should not be accepted without prior approval by Beaumont CME. As soon as you receive a notice that a grant is approved pending acceptance of the terms, provide Beaumont CME with your login information or a copy of the original grant request and the electronic agreement terms. Beaumont CME will review the terms and notify you if and when they can be accepted.

When can I acknowledge the grant funding?

The grant LOA must be fully executed (signed by Beaumont CME and the company) prior to being announced in marketing materials AND prior to the activity occurring. Funds cannot be accepted without a fully executed agreement received prior to the activity.

What if the approved amount of grant funding changes?

If the grant amount changes, either a new agreement must be signed or the amount changed on the original agreement and the change signed & dated by all parties. Notify the Department of CME if this situation arises for proper guidance.

What documentation does the Beaumont Department of CME require?

After the grant has been signed and before the activity occurs: Fully executed grant LOA (signed by Beaumont CME and the company providing the grant)

After the activity occurs: Copy of the grant check AND final budget detailing how the grant funds were actually spent.

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CME Guidelines Related to Educational Grants and Exhibit Space

Department of Health and Human Services: Office of Inspector General Compliance Program Guidance for Pharmaceutical Manufacturers

To reduce the risks that an educational grant is used improperly to induce or reward product purchases or to market product inappropriately, *manufacturers should separate their grant making functions from their sales and marketing functions*. Effective separation of these functions will help insure that grant funding is not inappropriately influenced by sales or marketing motivations and that the educational purposes of the grant are legitimate. Manufacturers should establish objective criteria for making grants that do not take into account the volume or value of purchases made by, or anticipated from, the grant recipient and that serve to ensure that the funded activities are *bona fide*. The manufacturer should have no control over the speaker or content of the educational presentation. Compliance with such procedures should be documented and regularly monitored.

Source: <http://www.oig.hhs.gov/authorities/docs/03/050503FRCPGPharmac.pdf>

Standards for Commercial Support: Appropriate Management of Associated Commercial Promotion

Is it acceptable to say, "In exchange for \$5,000 of commercial support we will produce the CME activity and as a commercial supporter you will get an acknowledgment and a 4 x 4 sq ft booth in the exhibit hall."?

No, in this scenario the commercial interest is giving commercial support and getting promotional and sales opportunities. Opportunities for advertising and promotion are being purchased with commercial support and have become a condition of the support. Both of these are **Not in Compliance** with the Standards. The commercial interest should buy advertising and promotion opportunities with resources designated for that purpose. If an agreement for advertising or promotion is struck between the two parties it must be outside the written agreement for commercial support. With respect to commercial support, the terms and conditions of the support must be described in a written agreement between the accredited provider and the commercial supporter. Any event or product that contains advertising or promotional opportunities must not be part of the educational activity and must not be paid for by commercial support. Normally these are assigned to the "exhibit hall," advertising pages or screens or promotional receptions or meals, all of which are clearly identified as such by the learner.

Are advertising and exhibit opportunities always to be offered to commercial supporters?

No. Payment and arrangements for advertising and exhibits are separate, business transactions. They are payment for the sale of promotional space.

Sources: Accreditation Council for Continuing Medical Education

Beaumont's policy based on the above guidance:

Arrangements for commercial exhibits or advertisements cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support for CME activities.

1. Exhibit fees shall be separate and distinct from educational grants (they are not considered commercial support).
2. Exhibit fees shall be set for each activity and will be standard for that activity; potential exhibitors shall have equal access to purchasing exhibit space (first come-first serve).
3. All exhibitors must be in a room or area separate from the education and the exhibits must not interfere or in any way compete with the learning experience prior to, during, or immediately after the activity.
4. Commercial interest (pharmaceutical/device) representatives may attend CME activities at the discretion of Beaumont for the direct purpose of the representatives' own education; however, they may not engage in sales or marketing activities while in the space or place of the educational activity.