Boehringer Ingelheim Pharmaceuticals, Inc. (BIPI) is proud to provide Medical Education & Research Grant support for specific independent educational or research-related activities for healthcare providers and patients that may translate to better management of disease and improvement in patient safety and population health.

Overview

This self-guided tutorial is designed to:

1. Prepare Applicant Organizations for the www.bipigrants.com online submission and review process
2. Encourage complete, compliant grant submissions and address topics to help ensure a timely response from BIPI
3. Foster support of high quality, independent medical education

Applicant Organizations and designated Requestors are advised to explore these modules before beginning the grant application:

- **Tips for Requestors**—common issues in the grant application process (pages 2-4)
- **Ensuring a Complete Application**—fulfilling all requirements in each tab of the grant application (pages 5-16)
- **What to Expect: the BIPI Medical Education Grants Process**—steps involved and timelines (pages 17-20)
- **What to Expect if Approved**—necessary steps in the post-approval process (pages 21-23)
TIPS FOR REQUESTORS

Best Practices for BIPI Medical Education & Research Grants

Review this module to help prevent some of the more common errors made by Requestors throughout the grant application process.

- **Take time to read each question on the application thoroughly and carefully.** Updates to the application occur frequently and without notification. Even if you have prior experience with the application, review of the latest Submission Requirements is recommended.

- **The Requestor is the primary contact for the grant and will receive all communications from BIPI Medical Education & Research Grants.** If an application is completed by an Assistant on behalf of the Requestor, contact information for that individual can be added during registration. All parties named on the application should expect to be in communication throughout the review process.

- **Successful submission does not necessarily equal an application ready for review.** Applications can be returned for unclear or incomplete information. This can cause delays or result in a declined application if not returned promptly.

- **Allot enough time for BIPI Medical Education & Research Grants to review the application.** Grants must be submitted at least 60 days prior to the program start date.

- **Stay updated on current standards.** Medical education standards evolve. Remaining current with these standards will help to reduce grant processing time and minimize the need for clarifying communications.

**Most frequent reasons BIPI requests additional information**

More than half of the grant applications reviewed by BIPI are returned for additional information.

Most frequent reasons BIPI requests additional information (as seen within sections of the grant application):

1. **Applicant/Primary Organization:** The "Name" field on the W-9 tax ID form does not match the name of the Applicant Organization.

   The IRS requires the Applicant Organization/Primary Organization listed on the grant application to match the name on the W-9. The application will otherwise be returned for revision.
2. **Firewall Information**: The firewall questions are not fully answered or the Firewall Policy is not provided.

When applying for independent grant support, all Requestors (from both accredited and non-accredited Applicant Organizations) must provide information regarding their organization’s process for maintaining separation between educational activities supported through independent medical education grants, and other activities in which payments have been received from commercial supporters for services rendered.

In addition to fully answering the firewall questions within the Main tab of the online application, a copy of your firewall policy (if applicable) should be uploaded in the Attachments tab of the application.

3. **Conflicts of Interest**: The Conflict of Interest Policy is not provided (or, for accredited providers, is not specific to the academic office providing the CME/CE).

The Conflict of Interest Policy needs to be provided by both accredited and non-accredited Applicant Organizations. For accredited organizations, the policy should be specific to the educational program—not the overall organization.

The COI Policy should be uploaded in the Attachments tab of the application. It must clearly and completely describe the methods by which a conflict is identified, resolved, and disclosed to participants in the proposed activities.

4. **Learning Methodology**: The learning methodology question is not answered accurately.

The learning methodology question within the Program Details tab requires you to describe learning methodologies selected, and to demonstrate how these methods may bridge the educational gap.

5. **Content Validation**: The content development and validation question is not fully answered.

The content development and validation question within the Program Details tab requires that Requestors not only provide a detailed description for how an organization is going to create the content for the program but also how the content will be checked for medical accuracy and balance. This process is often best supported through independent peer review.

6. **Venue Information**: Specifically-named Venue Information is not provided.

The Venue Information section of the Activity Details tab requires Requestors to list the specific name, address city, state and ZIP code of any venue associated with the activities for the education program. BIPi recognizes that in some circumstances venue selections may be tentative (e.g., in cases of National Congresses where venues are to be determined by the Association). Criteria for selection of specific venue is expected.

7. **Outcomes Assessment**: The experience, capabilities, and methodology of the entity performing the outcomes assessment are not provided.

Questions pertaining to outcomes assessment(s) within the Activity Information section of the Activity Details tab must be answered completely, including how learning objectives are achieved and results measured, who will be doing the measurement, and how that organization is qualified to measure outcomes.

8. **Budget**: The total category cost and unit cost are incorrectly noted as the same value, with “1” entered as the number of units.

The unit cost should be entered as the dollar value of a single unit. The number of units (shown in the application as “# Units”) should be the total quantity of units.
9. **Reconciliation**: Reconciliation is not received, is incomplete, or unused funds are not returned to BIPI.
   - *Per the LOA, full documentation of all receipts and invoices as required as part of financial reconciliation.*
   - *Outcomes Measures Reporting is required. Failure to submit this documentation may jeopardize future grant support.*
   - *If unused funds are identified during internal reconciliation review against receipts and invoices for executed programs, BIPI expects and will pursue a refund.*

10. **Letter of Agreement**: Applicant Organization fails to return a signed copy of the LOA.
    *Every Applicant Organization is required to return a signed copy of the LOA in order to receive payment.*

11. **Banking Information**: Banking information is not uploaded into grant application.
    *Applicant Organizations that do not enter ACH banking information into the grant application will not receive grant payment.*
Depending on the complexity of the program, the estimated time to complete a BIPI medical education grant application is approximately 60-90 minutes.

**Before You Begin**

The following contains vital information about what is required for a complete application.

**Allotting Enough Time**

- **Checklist**
  - All Requestors are advised to have this information prepared before starting the grant submission process.
  - Organization's Mission Statement
  - Signed Letter of Request (on Applicant Organization's letterhead) that includes the amount requested
  - Federal Tax ID (W-9)
  - Properly-cited Needs Assessment
  - Certificate(s) of Accreditation (if accredited program)
  - Written Firewall policy
  - Written Conflict of Interest (COI) policy
  - Learning Objectives
  - Program Agenda or Brochure
  - Activity Dates and Location
  - Budget Information
  - These items will be requested at various points throughout the application, and having them prepared in advance will decrease the amount of time it takes to complete your proposal.

**Asterisked Items (*) Within the Grant Application**

A response to these questions is required.

Failure to carefully interpret and provide a meaningful answer to these questions may result in delays or an application being declined.
Accessing the Grant Application

To apply for support from BIPI Medical Education & Research Grants, Requestors must access the online grant application through https://bipisupport.envisionpharma.com/vt_bi/#Login.

New visitors must register in order to begin a new application. Returning visitors can log in to start an application, return to a saved application, or track the status of an application already submitted. An application ID beginning with "ME" will be assigned once you submit the application.

- Keeping account information updated will be important, as BIPI frequently sends time-sensitive requests for additional information during the grant review process.
- Because the online grant application system maintains a history of the applications submitted by each Requestor, BIPI Medical Education & Research Grants advises Applicant Organizations to have only one profile in the system.
- Keeping track of login information (i.e., the user name and password used to create a profile) will allow new users to access the Applicant Organization’s profile and review grant history in the event of personnel changes.

The Welcome Screen

The online medical education grant application is the only method for requesting grant support from BIPI.

- The responses provided are the Applicant Organization’s opportunity to demonstrate full awareness of and compliance with industry standards for independent medical education.
- Questions marked with asterisks (*) are mandatory. Failure to carefully interpret and provide meaningful answers to these questions may result in delays of decisions or an application being declined.

- NOTE: The tasks visible on the Welcome screen will change once a grant is submitted. Additional options may include "Grants to Complete," "Grants requiring Additional Info," "Grants requiring Reconciliation," and "Grants requiring Bank Info" (for approved grants only).

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**Update Your Profile**

This option will open a dialogue box on the website allowing you to adjust your account information.

The Primary/Applicant Organization must be skilled in the development and execution of educational programs. For example, the Primary/Applicant Organization should be the academic office responsible for providing the education and not the logistics provider or a faculty member (e.g., speaker, presenter) associated with that institution. If an application is completed by an Assistant on behalf of the Requestor, contact information for that individual can be added or updated on this screen.

NOTE: BIPI will only contract with and make payment to the Applicant Organization. Any other involved organizations will be considered third parties to the Agreement with BIPI.

The information you give here will be used to automatically populate parts of your grant application. Please make sure this information is accurate, or it may cause delays.

Examples:

- If the program is offering continuing education credit, the Requestor must be an individual associated with the accredited organization.
- The Primary/Applicant Organization must match the "Name" field on the W-9 Tax ID form.
New Grant

Clicking the "New Grant" hyperlink will open a dialog box informing you of the requirements BIPI has for all Applicant Organizations.

Updates to the application occur frequently and without forewarning. Even if you have completed an application before, careful review of the latest submission requirements is recommended.

After you’ve read and acknowledged the requirements, complete some basic information about the program. The information you provide about Therapeutic Area, Audience, Applicant Organization’s
Accreditation and Total Program Cost will automatically populate other fields in the application. Please make sure they are completed accurately.

Click “OK” to move on to the Main Tab of the application.

**The Main Tab**

The Main Tab collects the information needed for BIPI Medical Education & Research Grants to begin evaluating your program’s eligibility for support.

The questions on this tab are asked with these goals in mind:

- Learning general information and Applicant Organization details
- Demonstrating your Firewall Policy and establishing that your organization has procedures in place to prevent any actual or perceived Conflicts of Interest.

**General Information**

These questions seek to identify vital information about your organization, such as name, Tax ID and contact information.

**Firewall**

Commercial supporters must ensure that Applicant Organizations have adequate provisions for independence between individuals, processes, and financial systems during all stages of program conceptualization, development, and execution, including assessments of unmet needs for an independent educational program.

Requestors for whom this is applicable must provide this written policy for how their organization maintains separation between independent medical education activities and other activities (e.g., Speaker's Bureaus, Brand team Advisory Boards) which payments have been received from commercial supporters. For example, participation in the development and execution of promotional medical education activities with the BIPI commercial divisions can limit the Applicant Organization’s eligibility for consideration of an independent medical education grant. This mandate is established to prevent the potential for commercial bias from being introduced into independent medical education content.
Conflicts of Interest

All Applicant Organizations must provide a Conflict of Interest (COI) policy, whether the program is designed to educate healthcare providers or patients, and whether or not the program provides certification.

The COI policy demonstrates that Applicant Organizations have a process to vet suggested faculty (e.g., speaker, presenter) or any other parties associated with the program. For example, the applicant organization must make known if any of these parties have received payment from commercial areas within BIPI.

The COI policy must communicate the Applicant Organization’s ability to appropriately identify, resolve, and disclose to learners, before education begins, any potential Conflicts of Interest between any parties involved in the program (e.g., speakers/presenters, authors, faculty, consultants/advisors, Partners or Joint Sponsors).

The COI policy also demonstrates the educational providers’ assurance that parties in a position to influence or control educational content are each aware of and abide by the generally accepted standards for independent medical education grants.

The Program Details Tab

The Program Details Tab collects information about your independent medical education program. Questions in this section can generally be divided into four categories:

General Program Information

These questions address the basic details of your planned program. It includes questions about the title of the program and anticipated start and end date. If the program provides certification, the Applicant Organization must name the accrediting body or bodies providing the certificates.
ENSURING A COMPLETE GRANT APPLICATION

REGAs

A REGA is a call for action to accredited providers in which BIPI states its interest in receiving grant applications that support medical education for HCP and patients that may translate to better management of disease and improvement in patient safety and population health.

Important notes about REGAs:

- REGA grants undergo the same review pathway as all requests for support. Missing a REGA deadline does not prevent Requestors from submitting a grant request.
- Additional information is often requested during the REGA grant review process.
- Indicate YES in the REGA box only if submitting a REGA application.
- While REGAs may specify timing of requested responses, BIPI will continue to review all grant requests that are received unless funding is unavailable.

Educational Details

These questions give Applicant Organizations the opportunity to describe how a program will fulfill unmet needs in medical education, and to outline its learning objectives. Information provided about learning methodology, content development and validation, faculty selection and training methods allows BIPI Medical Education & Research Grants to evaluate the educational merit of the program.

The learning methodology question requires you to describe learning methodologies not chosen, and to demonstrate their inability to bridge the educational gap. This is also an opportunity to provide evidence and/or reference literature in support of your learning methodology of choice.

Number of Potential Supporters

BIPI encourages submission of support of educational programs from a variety of sources, (i.e. multiple commercial supporters).
The Activity Details Tab

The Activity Details Tab collects information about the various activities that comprise a given program.

Requestors can add information about one or more activities or venues by clicking the “Add” icon in the relevant field. An activity must be added before venue information can be provided.

Activity Information

The Activity Information section gives Requestors the opportunity to show that their activity format and instructional approach aligns with the learning gap the program is designed to bridge. It is vital for applicants to demonstrate their understanding of generally accepted standards for providing independent medical education.

Every response is measured as an indication of either the eligibility, compliance, or quality standards for independent medical education grants.

NOTE: Questions pertaining to outcomes assessments must be answered completely, including how success and results will be measured, who will be doing the measurement, and how that organization is qualified to measure success.
ENSURING A COMPLETE GRANT APPLICATION

Venue Information

The Venue Information section asks Requestors to specifically describe the venue name(s) and location(s). Criteria for venue selection is expected, and may be sufficient if specific venue information is not available.

Every program venue is evaluated using the same standards, whether designed to educate healthcare providers or patients, and whether or not the program provides certification. Venue selection is based upon a number of factors, such as the cost of the venue.

BIPI Medical Education & Research Grants considers the venue information when evaluating the venue’s relevance to the educational needs of the target audience(s) and its conduciveness to learning methods that foster improvements in patient outcomes. The venue should not compete with or distract from the intended educational purpose.

The Budget Details Tab

The Budget Tab is designed to anticipate a variety of costs for development of a broad range of educational programs.

If your grant application is approved, reconciliation of several of the original grant budget will be required:

Management Fees

Please provide separate categorization for management fees and for each third party organization that may be involved in the project, such as:

- Project conceptualization
- General oversight
- Program management

NOTE: Fees for personnel are not considered a “management fee.”
Management fees do not include any items or work products that could otherwise be categorized as costs or expenses incurred in the production and development of a program or activity. Separate budget subcategories are available to define these types of expenses.

**Accreditation Fees (applies to accredited educational providers only)**

Include costs for the processing of all accreditation fees associated with the program; please use separate line items for multiple accreditation fees.

**Program Development Fees**

The cost associated with the development and execution of the program, such as:

- Development of content
- Programming and graphic development
- Recording and transcriptions
- Reprint and permissions
- Meeting planning and coordination
- Training event faculty (e.g., speaker, presenter)
- Registration desk
- Event-related staffing and managing on-site activities and programs
- Audience response systems
- Miscellaneous such as phone, fax, office supplies, etc.

Please be as detailed as possible and use one line item per each expense.

**Program Marketing Fees**

Any fees that relate to the Marketing Costs for the program. These includes all costs for recruiting attendees, such as:

- Acquisition of mailing lists
- E-mail fees
- Web partnerships
- Newsletters
- Costs incurred for the dissemination of these materials, e.g., printing and mailing

Please use a separate line item for each cost.

**Program Production Fees**

Any fees associated and pertaining to the production of event-related materials, such as:

- Web production
- Audio-visual production
- Printing/copying of meeting materials (slide kits, CDs, folders/binders, monographs)

Please be as detailed as possible and use one line item per each expense.
ENSURING A COMPLETE GRANT APPLICATION

**Venue/Facility Fees**

Any costs associated with the Program Venue or Facility in which the program takes place, such as:
- Meeting rooms
- Audio/visual fees for presentations
- Projectors
- Sound systems
- Meeting fees for event execution

**Meals Fees**

Include per person costs for meals for all individuals associated with the execution for the program, such as faculty (e.g., speaker, presenter), on-site staffing and attendees. Aggregating meal costs may result in delaying review or requiring resubmission of the request. Meal costs are taken into consideration in the review of Total Program Costs and must be kept to a minimum.

**Honoraria Fees**

Include any costs for honoraria, such as speaker, chair, and peer reviewers. Please be as specific as possible and create a new line item for each type of honoraria paid. A detailed explanation of roles and responsibilities is expected within the comments. The Applicant Organization’s honoraria policy may be requested.

**Travel Fees**

Include specific detail for all travel expenses associated with this program, such as those for faculty (e.g., speaker, presenter), vendors and staff. Travel costs are considered in the review of the Total Program Costs and must be kept to a minimum standard for travel to a given area.

**Program Performance (Outcome Assessment) Fees**

Include any costs pertaining to Outcome Measurements for your program.

NOTE: When entering fees, the **unit cost** should be entered as the dollar value of a single unit. The **number of units** (shown in the application as "# Units") should be the total quantity of units.
Attachments Tab

The Attachments tab allows Requestors to upload documents required to complete the application:

- Request on Letterhead, signed by an authorized representative from the Applicant Organization
- Properly-cited Needs Assessment
- Certificate(s) of Accreditation
- Conflict of Interest Statement (with Firewall Policy, if applicable)
- Program Agenda/Overview
- Project Plan

Requestors may upload any other documentation by clicking the "Add Attachment" icon in the Additional Attachments section.
The BIPI Medical Education Grant Workflow

The steps in the BIPI medical education grant process vary depending on Total Program Cost.

* Grants must be submitted at least 60 days before the program start date.

The Medical Education Grant Application

The online medical education grant application is the only method for requesting grant support from BIPI.

- The responses provided are the Applicant Organization’s opportunity to demonstrate full awareness of and compliance with industry standards for independent medical education.
- Questions marked with asterisks (*) are mandatory. Failure to carefully interpret and provide meaningful answers to these questions may result in delays or an application being declined.
- NOTE: The tasks visible on the Welcome screen will change once a grant is submitted. Additional options may include "Grants to Complete," "Grants requiring Additional Info," “Grants requiring Reconciliation,” and " Grants requiring Bank Info" (for approved grants only).
Completion & Eligibility Review (all applications)

Upon submission, each application is reviewed to ensure completion of all required grant submission documents and review the application against a composite of eligibility criteria for the application type.

Requestors are expected to adhere to all BIPI requirements and guidelines for independent medical education grants.

If there are inaccuracies or omissions, we will request additional information or further clarification from the Requestor, who is the primary contact for the grant. If this person is not actively involved with the grant application, Assistant Information can be added by updating the profile. All parties named on the application should be in frequent communication throughout the review process.

It is critical that Requestors respond to requests in a timely fashion; applications may be declined because of failure to provide information with enough time for BIPI Medical Education & Research Grants to complete the review process and execute the LOA before the eligible program start date.

If the grant application is deemed eligible, the grant moves on to the next stage: Compliance & Quality. If the application is declined due to ineligibility or delayed response to a BIPI request for additional information, the Requestor will be notified via email.
Compliance & Quality (all applications)

This portion of the review vets all grant applications to ensure compliance with organizational and relevant industry standards of independence for commercial supporters. This review phase also considers a criteria-based review.

- In the event of a decline decision, the Requestor will be notified via email.

Educational Merit (grants greater than $25,000)

This review provides oversight of eligibility, compliance, and quality criteria scores, analysis of educational merit, and the potential of the proposal to successfully bridge learning gaps in areas aligned to BIPI’s areas of scientific interest.

To rate educational merit, the reviewer considers the appropriate use of Adult Learning Principles and educational theories that support the proposed instructional method and educational design to alignment between the learning gap/need, target audience(s), outcomes method strategy, and intended program results.

This review:

- critically examines all data sources (provided and published)
- evaluates the quality of literature sources cited
- assesses scientific rationale and potential effectiveness of program to bridge learning gaps

Grants may be declined or advanced to a Grant Review Committee.

NOTE:

- Additional information requests may be asked during this stage of review.
- In the event of a decline decision, the Requestor will be notified via email.
Grant Review Committee (grants greater than $25,000)

The multi-disciplinary GRC considers how well the application meets the medical need it aims to address.

GRC Decision

- If a grant application is declined by the GRC, the Requestor will be notified via an email.
- If a grant application is approved, the internal signature process commences. Additional information may be requested.
- Requestors with unresolved questions regarding the grant decision may contact the Director, Medical Education & Research Grants.

For important information about the post-approval process, see What to Expect if Approved.

Tracking Your Grant Request

Do not contact the BIPI Medical Education & Research Grants office with questions regarding the status of your grant request. For your convenience, the current status of your grant request can be found on the Welcome screen.

Grants that are being prepared for submission but have not been completed will have a Grant Status of “New.” For grants that have been submitted, the Grant Status will appear as “Pending.” Following review by the Grant Review Committee, Grant Status will change to “Approved” or “Declined.”
Overview

Because the medical education grant application process does not end with Grant Review Committee (GRC) approval, Applicant Organizations may find it useful to review this module before submitting a grant application to BIPI Medical Education & Research Grants.

When a grant application is approved by GRC and subsequent finalization of GRC approval is obtained, the Requestor named on the application will receive notification via e-mail that includes the BIPI Letter of Agreement and directions for completing and returning the signed agreement to BIPI. These directions include how to send the executed LOA back to BI, adding the required banking information to the submitted grant application, and contact information if needed. The banking information is mandatory in order to receive payment on an approved grant. Requestors must log back into the BIPI Medical Education & Research Grants website (www.bipigrants.com) and respond to any tasks that appear in "Grants requiring Bank Info" to enter the banking information. Failure to complete post-approval processes in a timely and complete manner may result in delayed payment or rescinded approval.

IMPORTANT NOTE: Payment for all approved grant applications will be made via Automated Clearing House (ACH) Network, a secured, highly reliable and efficient nationwide batch-oriented electronic funds transfer system. There will be NO exceptions to this payment method.

BIPI and the Applicant Organization (only) execute Letters of Agreement (LOA).

Post-approval Reminders:

- Letter of Agreement must be signed, scanned and emailed back to BIPI at least 1 week prior to the start date of the program (read more about the LOA)
- Complete banking information must be entered in the online medical education grant application system before payment can be made (read more about Payments)
- BIPI must be notified in advance if changes are made to the program scope (read more about Changes in Program Scope)
- The Reconciliation process must be completed within 90 days of the close of a program (read more about Reconciliation and Closure)
- Outcome Measure Reports must be completed for most programs with a Total Program Cost greater than $25,000 (read more about Outcome Measure Reporting)

The BIPI Standard Letter of Agreement

The Applicant Organization (only) will receive a LOA from BIPI.

- A BIPI LOA is the sole agreement accepted for any approved request for an independent medical education grant.
- The BIPI LOA is non-negotiable.
WHAT TO EXPECT IF APPROVED

• The LOA is exclusively between BIPI and the Applicant Organization.
• The LOA must be signed by the Applicant Organization, scanned and returned to BIPI a week prior to the program start date in order for programs to be funded.
• Delays in returning the signed LOAs can result in rescinded approval.

Payments

Once notified of approval by BIPI, Applicant Organizations must enter complete banking information in the online medical education grant system before payment can be made. Failure to provide banking information promptly and well in advance of Program Start Date may delay payment or result in rescinded approval.

Payments for approved grant applications are made via the Automated Clearing House (ACH) Network, a secure, encrypted electronic funds transfer system. There are NO exceptions to this payment method. Requestors will receive an email notification of payment(s).

Payments for approved grants less than $75,000 will be made in one payment following full execution of the LOA and banking information.

Payments for approved grants of $75,000 or more will be addressed in three phases:
  • 40% of total BIPI grant amount immediately following full execution of the LOA and banking information
  • 40% of total BIPI grant amount two (2) weeks after Program Start Date
  • Balance of payment (if applicable) will be calculated upon satisfactory completion of the financial reconciliation
    o The final payment may never exceed 20% of the original approved amount
    o Pending determination of projected vs. actual Total Program Cost, a refund of unused funds may be due to BIPI

Changes in Program Scope

If the Applicant Organization is unable to execute the educational program as specifically approved by BIPI due to changes to the program scope after receiving notification of approval for full or partial grant support, the Requestor must promptly notify BIPI by emailing medgrnts.rdg@boehringer-ingelheim.com.
  • Change of Scope forms with instructions will be sent to Requestors. Revised budgets may also be requested.
  • No funds may be used for the modified program without receiving BIPI's prior written approval.
  • If the Applicant Organization has received funds and does not secure BIPI's approval for the revised program, those funds must be immediately returned and the LOA will be terminated.
WHAT TO EXPECT IF APPROVED

• In some instances, the Requestor may need to submit a new application. The application will follow BIPI’s grant review process as if it were an initial request. It is within BIPI’s sole discretion to approve the modified application.

• No additional funding will be awarded if the change in scope results in Total Program Cost greater than the original educational program. BIPI will hold the Applicant Organization liable for the terms of this Agreement.

Reconciliation and Closure

The reconciliation process is conducted for all BIPI approved grants. The Applicant Organization is responsible for ensuring that reconciliation of an independent medical education program provided by a BIPI grant answers, at a minimum, three basic questions:

1. Was a bona fide education program successfully executed as expected?
2. Were the desired outcomes achieved?
3. How were resources used (or not used) to achieve these goals?

These standards for independent medical education provide guideposts for how, when, what, and to whom independent grants from commercial supporters may be awarded, and are a clear safeguard against fraud and abuse.

Financial Reconciliation Instructions

The Requestor named on the original grant application will receive complete reconciliation instructions via email approximately one week after the conclusion of the program.

• All Requestors must enter actual fees and pass-through expenses numerically AND by providing copies of receipts and invoices into the online grant application Budget Template within 90 days following the end of a program. Not all budget categories will require reconciliation.

• All unused funds must be returned immediately by check to BIPI using the instructions provided during this process.

Outcome Measures Reporting

Outcome Measures (i.e., Program Performance or Outcome Assessment) are an accepted standard for accredited Applicant Organizations that have been approved to receive grants from BIPI with a Total Program Cost greater than $25,000.

While there are many well-established Outcome Measures, there is no specific approach required by BIPI.

All accredited Requestors must provide Outcome Measures Reporting for programs with a Total Program Cost greater than $25,000, whether or not the program provides certification. Outcomes Measures are preferred for programs with a Total Program Cost of $25,000 or less.

Applicant Organizations must demonstrate their ability to achieve meaningful results.
BIPI Medical Education & Research Grants Overview

The primary function of BIPI Medical Education & Research Grants is to critically evaluate requests for support of independent medical education, from accredited and non-accredited education providers, developed to educate healthcare providers and/or patients. This is achieved via a process that:

- has a unified set of standards
- is fair (i.e., applied equally to serve all)
- is easily understood
- is transparent

The BIPI Medical Education & Research Grants staff is comprised of individuals with robust medical education, pharmaceutical industry/therapeutic area expertise, and professional training (e.g., CCMEP credentialing). Their professional backgrounds and extensive experience in adult learning principles, educational theories, learning methodologies, guidelines, regulations, and medical education standards of independence for commercial supporters are rigorously applied to their respective roles and responsibilities.

Our Mission

The Mission of the Boehringer Ingelheim Pharmaceuticals, Inc. (BIPI) Medical Education & Research Grants department is committed to supporting innovative, high quality, independent medical education for healthcare professionals and patients that resolves unmet medical needs, fosters clinical excellence, and measurably improves health outcomes.

The BIPI Medical Education & Research Grants Department supports:

GRANTS

Good quality (i.e., evidence-based) education that is responsible for improving the quality and safety of patient care, using adult learning principles and outcomes methods, is not biased by commercial influence (i.e., independent), uses tested education theories and technologies, and upholds the standards of compliance for medical education stakeholders, established for successful disease management.
Standards of Compliance

BIPI has implemented a fully operational Compliance Program in which Medical Education & Research Grants functions independently from the commercial business operational unit (e.g. Sales, Marketing). BIPI Medical Education & Research Grants places operational emphasis on the highest standards of educational excellence as the basis for support of independent medical education proposals.

Policies & Processes

BIPI Medical Education & Research Grants has developed policies and processes to ensure efficient, effective and compliant consideration of independent grant applications for qualified Applicant Organizations.

This provides all entities with the opportunity to pursue meaningful collaboration that aims to reach each respective business goal.

- BIPI will only contact Requestors to address specific informational needs to evaluate applications during the application review and as specified in the Letter of Agreement for approved grant applications.
- BIPI does not entertain capabilities presentations from interested Applicant Organizations.
- BIPI does not meet with Applicant Organizations to discuss or solicit specific independent medical education programs.
- Please review the Educational Objectives outlined for each of BIPI’s therapeutic areas of interest on www.bipigrants.com.
- Requestors with unresolved questions or issues may contact the Director, Medical Education & Research Grants.

Read more in the following modules:

- Ensuring a Complete Grant Application
- What to Expect: the BIPI Medical Education Grant Process