

Standard Operating Procedure – Educational and Fellowship Grant Guidelines

Balt USA, LLC from time to time provides grants to support scientific and educational events and programs related to advancements in the diagnosis and treatment of neurovascular disease.

Balt USA provides grants to support the following types of educational programs:

- National, regional or local conferences and professional meetings, eligible for continuing medical education (CME) credit or otherwise.
- Grand Rounds presentations.
- Publication or rebroadcasts of a CME Conference or program (in booklet or pamphlet form, over the Internet, etc.).
- Other independent, bona fide educational materials or initiatives.
- ACGME-Accredited Fellowship Programs.

Educational Grants are provided only for **independent** third-party educational events and programs. If you are interested in collaborating with Balt USA to provide patient or physician education about Balt USA products, please contact Chief Compliance Officer.

Educational Grants awarded by Balt USA are provided without condition of product use or contingent upon any commitment to purchase, use or recommend use of any Balt USA products.

Educational Grant requests should be submitted at least **60 days** prior to the program date (**90 days** for Fellowship Grants). Submitting a late or incomplete grant application may result in denial of the request without review.

Employees of Balt USA are not permitted to submit grant requests on your behalf and do not have the authority to award or commit support for Educational Grant Requests. Grant requests must be submitted to Balt USA's Chief Compliance Officer directly by your institution or organization.

Recipients of Balt USA educational grants for accredited educational programs must agree to abide by all applicable requirements of the accrediting body as well as the

Standard Operating Procedure – Educational and Fellowship Grant Guidelines

AdvaMed Code of Ethics on Interactions with Health Care Professionals (or, for programs outside the United States, the Eucomed Code of Ethical Business Practice).

- ☑ Submission of a request does not constitute a guarantee of funding.
- ☑ Previous support of an educational activity does not guarantee future support.

Educational Grants are awarded by several determining factors which include available grant funds, compliance with applicable industry and professional standards, whether the request is within our field of interest, and our corporate business needs. As much as we would like to support all medical educational activities we appreciate your understanding that all requests cannot be supported.

If your request is approved, you will receive a grant agreement. Balt USA must receive a signed copy of the grant agreement from the payee institution or organization prior to disbursing any funds.

Your request must include all of the following to be considered:

For Educational Event Sponsorships:

Letter of Request outlining the nature and purpose of the educational activity, qualifications of speakers, the amount being requested, and general background of the educational activity, and identifying the payee of grant funds.

Agenda for the educational activity: topics, number of days and schedule of the program. The agenda should also include any entertainment that will be a part of the program.

Budget breaking down how the funds will be utilized within the overall program budget: Faculty, Food, mailing expenses, etc.

Meeting Objectives- Provide details on what the program will accomplish for participants along with the need to have the program.

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Statement of Accreditation- If the program will have continuing education credits, please provide the statement on accreditation from the accrediting institution acknowledging support of your program.

Program Brochure- Please only provide a copy of the actual program brochure should it be available. Past program brochures should not be included in your request.

Levels of Support Available- Please provide the different levels of support that are available. (i.e.: Gold Level, Silver Level, Booth Display, Lunch Sponsor, Bag Sponsor etc.) *Although we may not be able to grant you with your requested amount, providing the different levels of support will help us determine the level we can support.*

For Fellowship Grants:

Letter of Request outlining the objectives, structure, and beginning and end dates of the fellowship program, fellow qualifications, the amount being requested, general background about the fellowship program, and identifying the payee of grant funds.

Budget for fellowship program, including fellow stipend, travel or research expenses, and any overhead charges.

Program Objectives- Explain how the program will accomplish its stated objectives, including the research and educational opportunities to be provided to the fellow(s).

Accreditation- Provide information about the accreditation of the fellowship program.

Nonprofit Status- Provide evidence of the nonprofit status of the payee organization.

Grant requests may be submitted by e-mail or hard copy as follows:

- Email- Email all documents to: grants@Balt USA.com
- Mail- Mail all documentation to:

Balt USA, LLC

Attn: [David Portillo, Controller](#)

Balt USA

29 Parker, Irvine, CA 92618
tel 949.788.1443 fax 949.788.1444

balt-usa.com

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Irvine, CA 92618

Balt USA has established a Compliance Committee as part of our ongoing commitment to ensure that our interactions with healthcare professionals are conducted with integrity and in compliance with the Balt USA Comprehensive Compliance Program, the AdvaMed Code of Ethics and the Eucomed Code of Ethical Business Practice.

The following is a (non-exhaustive) list of what Balt USA will NOT support:

- ☒ Paying an honorarium or expenses directly to the faculty for a professional association's meeting
- ☒ Brick & Mortar (To build or support the building of labs, offices, research centers etc.)
- ☒ Paying registration and/or travel costs for a U.S.-licensed physician or medical student to attend a third party educational conference (provided that grant funds may be used at the meeting organizer's discretion to support reasonable speaker expenses and honoraria and/or scholarships to permit attendance by students, residents or fellows, consistent with the budget for the event and with any applicable accreditation standards).
- ☒ Sponsoring a fellow for a private practice
- ☒ Paying an honorarium to attend any third party educational conference
- ☒ Sponsoring lavish dinner meetings
- ☒ Sponsoring meetings devoted to purposes other than training and education
- ☒ Meetings lacking a specific scientific agenda or organizational sponsor

Balt USA is committed to supporting the training and education of healthcare professionals under the guidance of ACCME and the AdvaMed Code of Ethics and Eucomed Code of Ethical Business Practice.

For more information on guidelines please visit:

www.accme.org, www.acgme.org, www.advamed.org, www.eucomed.be

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