



Changes in Industry Funding: Strategies to Maximize Support

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TOGETHER WE MAKE A GREAT TEAM



Objectives

- After participating in this activity participants should be able to:
 - ❖ Discuss the expectations of grantors as it relates to requests for commercial support for CE activities
 - ❖ Explore ways to determine the relevance of topics submitted to grantors for commercial support consideration
 - ❖ Describe and implement appropriate outcomes assessment activities for educational activities

Grant Review Process

Grantors expect grant requests to be:

- ❖ Relevant to the grantor's areas of interest
- ❖ Concise
- ❖ Needs-based
- ❖ Educationally sound
- ❖ Outcome-focused
- ❖ Reasonable
- ❖ Compliant
- ❖ Reconciled

Relevance to Grantor's Interests

- Approximately 40 % of grant requests are declined because of topic
- Review grantor's website, make sure topic is aligned with the grantor's areas of interest
- Check before submitting grant – interests can change frequently
- Many grantor's only support therapeutic topics where they have a commercial interest

Relevance to Grantor's Interests

Consider Product Life Cycle



- Increase awareness
- Increase knowledge (MOA, safety, efficacy, clinical data)
- Prepare for change

- Validate new approaches
- Incorporate new behaviors in practice
- Identify and resolve barriers

- Communicate supporting guidelines
- Communicate new data (evidence-based medicine)
- Reinforce best practice

Curricular approach to continually address all levels of behavior change readiness

What Grantors Expect

- Concise – Be brief and to the point
- Needs-based
 - ❖ Needs expressed in terms of practice gaps (desired practice vs current practice)
 - ❖ Don't focus on scope of the problem (burden of disease)
 - ❖ Objectives must be linked to identified needs
 - ❖ Expected results must match educational needs and objectives

Example

• Needs assessment

- ❖ Evidence-based guidelines dictate that at-risk surgical patients receive prophylaxis against venous thromboembolism. (What should be)
- ❖ According to the ENDORSE study published in 2008, only 58.5% of surgical patients at risk for VTE received ACCP-recommended VTE prophylaxis. (What is)

• Learning objective

- ❖ At the conclusion of this activity, participants will be able to assess the risk of VTE in surgical patients and recommend appropriate interventions based on the American College of Chest Physicians guidelines

• Outcomes assessment

- ❖ Case-based post-activity test

What Grantors Expect

- Educationally sound
 - ❖ Expected outcomes are reasonable, based on the educational intervention
 - ❖ Appropriate methods
 - ❖ Active learning
 - ❖ More than one type of intervention used
- Outcome based
 - ❖ Evaluate effectiveness of education initiatives
 - ❖ Demonstrate the value of the activity
 - ❖ “One offs” have little benefit

Measurement of Outcomes

Increasing expectations of grantors

- Level 1 – Participation
- Level 2 – Satisfaction
- Level 3 – Learning
- Level 4 – Performance
- Level 5 – Patient Health
- Level 6 – Population Health

Moore DE. A framework for outcomes evaluation. In: David D, Barnes BE, Gox R, eds. *The Continuing Professional Development of Physicians: From Research to Practice*. Chicago: AMA Press: 2003.



Outcomes – Continued

- Level One

- ❖ Participation
- ❖ Number of participants

- Level Two

- ❖ Satisfaction
- ❖ Degree to which expectation of participants are met
- ❖ Likert-scale questions on evaluation tool

Outcomes - Continued

● Level Three

- ❖ Learning
- ❖ Changes in knowledge, skills, and or attitudes of participants
- ❖ Development of competence
- ❖ Examples
 - Activity post tests (for all enduring activities)
 - Case-based activities
 - Commitment to change (assessed on evaluation tool)
 - What changes will you implement as a result of your participation?

Outcomes – Continued

- Level Four
- Performance
- Changes in practice performance
- Application of what was learned
- Examples
 - ❖ Post-activity survey 3-6 months out
 - ❖ Where changes in practice implemented?
 - If so, what changes?
 - If not, why not?

Outcomes – Continued

- Level Five
- Patient health
- Changes in health status of patient
- Due to changes in practice behavior
- Examples
 - ❖ Chart reviews
 - ❖ Drug utilization reviews

Outcomes – Continued

- Level Six
- Population health
- Changes in health status of a population of patients due to changes in practice behavior
- Example
 - ❖ ????

What Grantors Expect - Continued

• Compliance

- ❖ Fair market value for honoraria
- ❖ Appropriate faculty expenses
- ❖ Appropriate venue
- ❖ Avoid linking to promotion/exhibits
- ❖ Review “Ask ACCME” section of www.accme.org

What Grantors Expect - Continued

- Expense Reconciliation

- ❖ Demonstrates activity is completed
- ❖ Ensure funds were spent as described in the grant request
- ❖ Return unused funds
- ❖ Maintain detailed records in case of audit

Budget Considerations

- Management Fees
 - ❖ Content Development
 - ❖ Program Management
 - ❖ Logistic Management
- Direct Program Expenses (pass-thru)
 - ❖ Attendee Recruitment
 - ❖ Accreditation/Certification Fees
 - ❖ Association Fees
 - ❖ Catering
 - ❖ Audiovisual
 - ❖ Speaker Expenses
 - ❖ Honoraria
 - ❖ Program Materials

Additional Considerations

- Correspond only with Medical Education Grants Office personnel, not with sales and marketing
- Each company has its own rules – review grant sites before submitting
- Some grantors do not want faculty included in grant requests
- Do not make special mention of the commercial supporter's product or product class

Additional Considerations

- Budgets are tight and competition is stiff
- Review public disclosure sites
- Consider multiple educational interventions/repeated exposure
- Collaboration among providers is viewed favorably
- Multiple support of an activity reduces grantor risk exposure

Questions?

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