

# U.S. Patient Advocacy Educational Programs and Patient Advocacy Organization Fundraising Events

## *Frequently Asked Questions*

### Eligibility -

1. What is grant funding at Merck?

We believe that supporting non-profit organizations through grants and charitable contributions is a responsible and important way that we can help address global health challenges.

Merck Sharp & Dohme (MSD), known as Merck & Co., Inc. in the U.S. and Canada, offers support through a variety of grant and charitable contribution programs, each of which has its own focus and application process.

U.S. Patient Advocacy (USPA) supports U.S.-based patient advocacy educational initiatives and charitable fundraisers for our therapeutic areas of interest. The grants we support are independent and follow internal and external compliance guidelines, rules, and regulations.

2. Who can apply for Patient Advocacy Grants?

Non-profit U.S.-based organizations focused on patient advocacy or patient education, including patient organizations and patient advocacy groups.

3. Who can apply for Fundraising Charitable Grants?

Non-profit U.S.-based patient or advocacy organizations whose primary purpose is to raise funds to support the charitable mission of the organization.

4. What is a Patient Advocacy Grant?

Patient Advocacy Grants are independent grants that may be given to U.S.-based non-profit patient organizations that focus on improving patient health and quality of health care through education and programming. This includes:

- Increase disease awareness
- Improve patient education and patient care
- Improve societal access to medicines and vaccines
- Reduce health disparities and the treatment of disease

5. What is a Fundraising Charitable Grant?

Fundraising Charitable Grants are independent grants that may be given to non-profit charitable organizations or institutions to support fundraising. The fundraising must be for U.S. healthcare-related charitable causes or other community-based charitable fundraising initiatives.

6. What are the eligibility criteria for Patient Advocacy Grants?

Organization: Eligible applicants may be non-profit (501(c)3 or 501(c)6 registered), U.S.-based organizations focused on patient advocacy or patient education, including:

- Patient and advocacy organizations
- Professional societies conducting a patient advocacy program

Eligible organizations must have a demonstrated track record of success in implementing patient advocacy activities similar to those they are requesting funding for.

Program: We will consider requests for patient advocacy, education, awareness, and support initiatives that align with one of Merck's therapeutic areas of interest. Activities may include live and virtual programs or symposiums, podcasts, webcasts, newsletters, print materials, social media and website content, or videos.

7. What are the eligibility criteria for Fundraising Charitable Grants?

Organization: Fundraising Charitable Grants are independent grants that may be given to non-profit charitable organizations or institutions to support fundraising. The fundraising must be for U.S. healthcare-related charitable causes or other community-based charitable fundraising initiatives.

Event: Requests must be in support of a U.S. healthcare-based programs or events that aligns with one of Merck's therapeutic areas of interest. Fundraising events may include but are not limited to runs, walks, or galas.

8. What may disqualify a Patient Advocacy request from being funded?

Examples that may disqualify a Patient Advocacy request from being funded include but are not limited to:

- Requests from healthcare providers (HCPs), HCP groups, other organizations that sell, dispense, prescribe, reimburse for, or distribute our company's products in the United States or their affiliated foundations
- Application is submitted less than 60 days before the program start date
- Support is sought for developing materials that have already been developed

- Support is sought for a program that has already happened
- Program is for accredited continuing medical education. Merck offers support to eligible organizations for accredited medical education [here](#)
- Program relates to a disease area or healthcare topic that differs from our company's therapeutic areas of interest
- Funding is for gifts, travel, lodging, or registration fees for people to attend the program
- Program is more social or recreational than educational
- Request is for a fundraising charitable event
- Program involves a religious, political, lobbying, fraternal, or social organization or person
- Speaker names or our company's product or generic names are listed in the grant application
- An application has been previously submitted for the same program
- Program will be held at a lavish (such as resorts, islands, beaches, and lavish restaurants and hotels) venue or a venue that may distract the educational quality of the program (such as theme parks, national parks, casinos, hunting/fishing lodges, and music/sporting/theatre events)

9. What may disqualify a Fundraising Charitable Event request from being funded?

Examples that may disqualify a Fundraising Charitable Event request from being funded include but are not limited to:

- Requests from healthcare providers (HCPs), HCP groups, other organizations that sell, dispense, prescribe, reimburse for, or distribute our company's products in the United States or their affiliated foundations
- Application is submitted less than 60 days before the event start date
- Support is sought for an event that has already happened
- Program is for accredited continuing medical education. Merck offers support to eligible organizations for accredited medical education [here](#)
- Program relates to a disease area or healthcare topic that differs from our company's therapeutic areas of interest
- Funding is for gifts, travel, lodging, or registration fees for people to attend the program
- Request is for a patient advocacy educational program
- The main purpose of the request is not to raise funds for a healthcare or healthcare-related topic
- Program involves a religious, political, lobbying, fraternal, or social organization or person
- Speaker names or our company's product or generic names are listed in the grant application
- An application has been previously submitted for the same program

10. Can I submit for a past program or a program that has started?

No, we are unable to support past programs or programs that have already started. We will only consider applications that are submitted at least 60 days before the program start date to allow sufficient review time.

11. What is the submission deadline?

Completed applications must be submitted at least 60 days before the program start date to allow sufficient review time.

12. Is there a limit to the amount of funding or number of requests one organization can submit?

There is no limit to the number of requests one organization can submit.

13. What other areas of Merck are responsible for grant funding?

Merck offers support to eligible organizations for accredited medical education [here](#) and for charitable programs [here](#).

14. What are Merck's therapeutic areas of interest?

- Oncology (cancer) -
  - Non-Small Cell Lung Cancer
  - Small Cell Lung Cancer
  - Pan-Tumor
  - Breast Cancer
  - Prostate Cancer
  - Bladder Cancer
  - Hepatocellular Carcinoma (liver)
  - Renal Cell Carcinoma (kidney)
  - Cervical Cancer
  - Head & Neck Cancer
  - Melanoma (skin) Cancer
  - Ovarian Cancer
  - Endometrial Cancer (uterine)
  - Hematologic/Blood Cancers
  - Gastric Cancer (stomach)
  - Colorectal Cancer
- Hepatitis C
- HIV/AIDS
- Immunization - Adult
- Immunization - Pediatric (for children)

- Human papillomavirus (HPV)
- Diabetes
- Chronic Cough
- Cardiovascular - Heart Failure
- Infectious Disease
- Anesthesiology/Perioperative Care
- Sleep Disorders
- Gastrointestinal (GI)/Rheumatology

## **Prepare to submit your application –**

1. May I complete part of my application and return to it later?  
Yes. If you can't complete your application in one sitting, you may save and return to it at another time by clicking "Save & Close" at the bottom of the page.
2. May I use a past application for a new request, to save time when listing our organization's information?  
Yes, you are able to duplicate a past application by clicking the "Duplicate" button to the right of that request on your homepage once you are logged in.
3. How do I know if I chose the correct grant type?  
Please read the definition of each grant type when applying carefully before proceeding to ensure you select the one most aligned with your request. Choosing the incorrect grant type may lead to your request being declined.
4. My disease or therapeutic area is not listed as an area of interest, but I know Merck has it in Clinical Trials, what should I do?  
Although your disease or therapeutic area may not be currently listed, please check back for updates.
5. What is considered a third-party entity?  
A third-party entity is any company or entity that is contributing to your program or activity with a direct written contract to provide products or services on your organization's behalf. All third parties must adhere to Merck policies and guidance.
6. How do I know if my application was submitted successfully?

Once your application is submitted,

- You will get a confirmation email from MSD Grant Portal (noreply@system.versaic.com)
- You will get important emails from this address – please add noreply@system.versaic.com to your address book or safe sender list so all future emails get to your inbox

You can also log in to check the status of your submission on your homepage of the Grant Portal.

## **Review and approval process –**

1. How long does it take you to review my application once I submit it?

Our company gets many requests for support and considers only applications aligned with our areas of interest received at least 60 calendar days before the start date of the proposed activity. This is a competitive process, and your completed application will be evaluated based on a variety of factors.

You will be notified of a decision as soon as possible. We may contact you for more information at any time during our review, and we ask that you return the information we need right away so that this doesn't delay the process.

2. The LOA has been signed, how long until we get the approved funding?

Payment for your program is expected to be transferred electronically within approximately 2-6 weeks of the fully executed (signed) LOA. The payment will be the approved amount and will be sent to the bank account provided in your application.

3. What is the review and approval process?

- a. Once we get your completed application, we review it and we may contact you if we need more information
- b. If a decision is made to support your request, you will get a Letter of Agreement (LOA) by email from DocuSign
- c. The LOA must be signed by your organization's authorized signer, as designated in your application, before the start date of your program or event
- d. Payment for your program is expected to be transferred electronically within approximately 2-6 weeks of the fully executed (signed) LOA
- e. If we are unable to support your request, we will email you that your request has been declined. All decisions are final.

4. If my request is approved, are we able to use your company's logo or an advertisement for program materials, and if so, where can I find one?

Yes, please say in your application that you will require a logo or advertisement, and we will send one to you once the Letter of Agreement (LOA) is executed (signed).

Please ensure meaningful disclosure of support for the program, resource, or activity. A sample of a disclosure statement is:

*This program/resource/activity was made possible through an independent grant from Merck & Co., Inc..*

For more information, please refer to the Trademark section of the executed (signed) LOA.

5. My request was declined – why?

We get many requests for support, and each is carefully considered. However, we are only able to fund a portion of these requests based on a variety of factors. All decisions are final.

6. Are all decisions final? Can I resubmit a request that has been declined?

All decisions are final, and we ask that you please do not resubmit any request that is declined during the same calendar year, as the request will be declined again. You may submit a new request for the same program or initiative during a future calendar year.

7. I received an email that the Letter of Agreement (LOA) was sent via DocuSign but cannot locate the email from DocuSign or the LOA. What should I do?

The LOA is only sent to the designated authorized signer. Please check your junk folder for the separate email from DocuSign. If you are still unable to locate the email, please reach out to your Merck USPA contact.

8. Where can I get a copy of the fully executed (signed) Letter of Agreement?

A copy of the Letter of Agreement will be sent from DocuSign when it is executed (signed).

## **Changes to your program –**

1. What should be considered if I need to make a change to a previously approved grant?

If there is any change to an approved grant, you must inform us before the start date of the program or event.

Examples of such changes are:

- Start or end date
- Venue or location
- Program details, objectives, agenda, or activities (such as live or virtual meetings or programs, website content, video content, social media content, podcast content, or newsletter content)
- Funding use or amount
- Any change impacting the executed LOA

We will consider the proposed changes and let you know if we approve or decline the change of scope request.

Approved changes may require a revised LOA. Declined requests may require a return of grant funds.

2. Can our organization use the grant funds for something outside of the Letter of Agreement that we deem important and necessary?

No. Per the Letter of Agreement, **funding may only be used in the manner and for the purpose for which the grant is intended, for the program specified in the agreement.** Any unused funding provided for the program must be returned during the reconciliation process. While you may not use the leftover funds for another program or initiative, you may submit a separate grant request.

3. I submitted a request for funding, but we have decided to cancel the program for which we requested funds. How do I tell someone about this?

Please tell your Merck USPA contact. The grant request will be cancelled. Previously approved requests may require a return of grant funds.

## Outcomes -

1. How do I submit my outcomes report?

Once your program ends, you will get an email from the MSD Grant Portal prompting you complete the outcomes form. Please note that outcomes reports are not required for charitable grants.

2. How long do I have to complete the outcomes form?

You must complete the outcomes form in 45 calendar days.



3. Why do I have to submit an outcomes report?

Outcomes give important information (such as attendance numbers, change in knowledge, testimonials, and success tactics) that help us understand the impact and effectiveness of the programs we support. It is a chance for your organization to share the success of your program. It also verifies that the funding was used as described in the approved request.

4. What happens if we don't complete our outcomes report?

If you do not complete the required outcomes form, it may affect your organization's eligibility for future grant support.

5. Can I request an extension to complete the outcomes form?

Yes, if you need more time, please inform your Merck USPA contact. We will assess your extension request and give the decision to the person who requested it.

## **Reconciliation -**

1. What is required during the reconciliation process?

You must complete a reconciliation form for a program that was funded with a Patient Advocacy Grant (it is not required for a Fundraising Charitable Grant). You will confirm that:

- I. The grant funds were used in agreement with the LOA and not used for any restricted purpose.
- II. The program happened and that the entire grant amount was used in the manner and for the purpose it was intended, only for the program specified in the LOA. You must return any unused funds by sending a check to the address on the reconciliation form.

2. How do I return unused funds?

Please list the amount of unused funds when you fill out the reconciliation form. Then send a check with that amount to the address on the reconciliation form.

3. How long do I have to complete reconciliation?

You will have 45 calendar days to complete the reconciliation form and return any unused funds to us.

4. What will happen if we don't complete reconciliation?

If you do not complete reconciliation, it may affect your organization's edibility for future grant support.

5. Can I ask for an extension to complete reconciliation?

Yes, please tell your Merck USPA contact if you need more time to complete reconciliation. We will assess your extension request and will give our decision to the person who requested it.