Vertex External Funding Opportunities: Frequently Asked Questions

Along with the information outlined on the Grants & Funding Opportunities page of the Vertex website, please review the information below regarding frequently asked questions on the Vertex funding guidelines.

If you have additional questions that are not answered on our website or in the questions below, please contact the Vertex Grants Team at vertex_grants@vrtx.com.

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1. General Funding Questions

What is Vertex's funding philosophy?
Vertex is committed to supporting activities that provide global healthcare improvements for healthcare providers, patients, and the scientific community. We apply a process that has a unified set of standards, is fair (i.e., applied equally to all), and is transparent. Requests with multiple potential supporters are preferred, and because we receive more requests than we can fund, not all submitted requests will be approved or approved at the amount requested. Please refer to Vertex's Grants & Funding Opportunities page to learn more about our current funding objectives.

What is the difference between a grant, sponsorship, and corporate membership?
- Vertex defines a **grant** as funds that we provide in support of an initiative in one or more of Vertex's therapeutic areas or areas in which we focus our research. Vertex does not receive anything in return for its funds, although transparent disclosure of support we award is required.

  Vertex awards grant support for independent medical education, patient advocacy and education, and scientific advancement. Examples include:
  - Independent medical education activities to educate healthcare providers and may or may not offer continuing education credits.
  - Patient advocacy and education activities that are developed to improve the quality of life for patients. These activities may be for patients and/or caregivers.
  - Scientific advancement activities promote awareness and education for the scientific community.

  To apply for a grant, please visit our Request Management System.

- Vertex awards **sponsorships** in support of an organization's independent event, meeting, or activity, such as regional, national, or global congresses, runs/walks, or other initiatives where Vertex receives meaningful recognition and "tangible benefits." Sponsorship opportunities should be made available to other potential sponsors, and the value of the benefits should be proportionate to the sponsorship amount. Examples of "tangible benefits" to help you determine whether your funding request is a sponsorship or a grant include: an exhibit booth, an advertisement in a program book, complimentary registrations, or other marketing opportunities.

  To apply for a sponsorship, please visit our [Request Management System.](#)

- A **Corporate Membership** is where Vertex provides support to an organization through an opportunity for Vertex to actively participate with the organization's leadership or other corporate members, including networking, attending the organization's meetings, and participating in committees or special interest groups.

  To apply for a Corporate Membership, please visit our [Request Management System.](#)

What is a tangible benefit?
A tangible benefit is an opportunity that provides a defined value to Vertex, generally in the form of marketing opportunities, such as an exhibit booth or table, registrations to an event, brand recognition, advertisement, or other corporate opportunities.

Is there a limit to how much funding Vertex can provide to one organization?
Vertex does not have specific limits to the amount of funding that an organization can request. In general, Vertex will not award more than 30% of an organization's total budget within a 12-month timeframe to safeguard the organization's independence.

Is there a funding cap for individual proposals?
While there are no specific limits to the amount that can be requested, the funding request should represent fair market value for the initiative. In addition to the requested amount for the specific initiative, Vertex will consider the total giving to an organization in relation to the organization's annual operating budget within a 12-month timeframe.

Is there a limit to the number of requests an organization may submit in a year?
Vertex does not limit the number of requests an organization can submit in a year, unless explicitly stated in the criteria of a specific external funding program, e.g., Circle of Care. Each request will be considered on its own individual merit. Please note that Vertex receives numerous applications and evaluates each application on its merits relative to our funding criteria outlined on the Grants & Funding Opportunities page of the Vertex website and available funds. Organizations may submit multiple requests at one time.

When should I submit my request?
Vertex has a rolling submission process, but we ask that you submit your request at least 45 calendar days prior to the activity start date, or 30 days prior to the date a decision is needed (for example, if there are printing deadlines). For Continuing Medical Education (CME) satellite symposia, it is recommended that you submit a minimum of 45 days prior to the deadline for the satellite symposium. These timeframes allow Vertex to review all requests and execute agreements for approved requests.

How long will it take for Vertex to review my request once it has been submitted?
Vertex reviews all requests as quickly as possible, but the time may vary from request to request; however, we generally review requests within 30 days once a submitted application is considered complete. To help minimize the review time, please ensure your request includes all required information at the time of submission and is submitted in English.

To learn about the specific requirements for each application, please go to [section 3 for grants](#) and [section 4 for sponsorships and corporate memberships](#).

May I submit a request for activities that have already taken place or for expenses that have already been paid?
No, Vertex cannot support activities that have already started and or expenses that have already been incurred.

Do all requests have to be submitted in English?
Yes, all requests must be submitted in English. For requests coming in a language other than English, we suggest you send the original version in local language and an English translated version. If you need assistance with translating a request, please contact the Grants Team at vertex_grants@vrtx.com.

Is there a standard template I need to complete to submit?
All funding requests must be submitted through the online portal, but there are no requirements related to formatting or length. Please be sure to complete all required fields within the application submission to assist with the review process.

All requests must be submitted through the Vertex Request Management System. Requests cannot be submitted via email to your internal Vertex contacts or to the vertex_grants@vrtx.com email address. If you have any questions about the system or how to register, please contact the Vertex Grants Team for assistance at vertex_grants@vrtx.com.

What is the difference between "Organization's Total Annual Budget" and "Total Project/Program Budget"?
"Organization's Total Annual Budget" refers to the organization's overall annual operating expense budget. "Total Project/Program Budget" refers to the total cost of hosting the request (conference, meeting, initiative, etc.).

Who should be listed as the "Legal Signatory"?
The Legal Signatory is the person authorized to sign the letter of agreement on behalf of the organization receiving funds.

The Legal Signatory may or may not be the contact for the organization or the submitter of the request. Vertex will not contact this individual without notifying the requestor.

2. Decision Process

How will I know when a decision has been made on my request?
The individual who submitted the request will be notified of the decision via email from the Request Management System. A request should be not considered approved until you receive the formal email notification.

I received notification from the Request Management System that Vertex approved my request. Can I consider this a commitment and move forward with the supported event/project/program?
While the Vertex Request Management System has communicated that your request will be supported, this approval is conditional until a Letter of Agreement has been signed by all parties (Vertex, Requestor, and Third-Party Accreditor [if applicable]). Vertex reserves the right to withdraw funding if Letters of Agreement are not signed prior to the program/event date.

Why did Vertex approve my request for an amount that is lower than I requested?
Vertex understands the need to support the efforts of requesting organizations. However, as Vertex receives many requests, not all requests will be supported at the amount requested.

Why was my request declined?
Vertex understands the need to support education and initiatives for healthcare professionals, patients, the scientific community, and the public. Please note that Vertex receives numerous applications for funding and evaluates each application on its merits relative to other applications. Vertex may not support a request for the following reasons:

- Request did not meet the required timelines/deadlines
- Request was not aligned to Vertex's funding objectives
- Request was duplicative of other funded activities
- Vertex has limited budget available
- Vertex has already provided 30% of an organization's total annual budget within the last 12 months
- Request did not have a substantive focus on education, scientific advancement, or promoting awareness for the scientific community, HCPs, patients/caregivers, or general public
- Request was out of scope from what Vertex could support in compliance with applicable law, industry best practices and codes, and Vertex policies and procedures
- Request focused on the provision of medical care or for out-of-pocket medical care expenses, including transportation and lodging in connection with the provision of medical care
- Request was to support specific individuals
- Request was for housing or travel for event/program activities or for personal travel

- Request was for Capital campaigns, building funds, or operating expenses (e.g., salaries, benefits, furniture, office equipment, rent, or utilities)
- Request was received after the project has started
- Request was for an activity held in a resort or other lavish venue or location
- Request was to support entertainment or recreation, including spa or resort activities
- Request was for events, projects, programs, or initiatives that are focused on Vertex products, and/or are used to directly influence or advance Vertex's commercial or marketing interests
- Request was for advocacy or lobbying activities directed towards specific legislation
- Request included costs and expenses that do not have an apparent link with the purpose of the request
- Request was an Investigator-Sponsored Study (ISS). To learn more about the ISS program and how to apply, visit the Grants & Funding Opportunities page or contact vrtxissgrants@vrtx.com.

Vertex has approved my request before, so why was it declined this time?

Vertex receives many requests globally every year, so the funding process is competitive. Each request is evaluated on its individual merit relative to other requests, and is based on funding availability. From time to time, we update and review our policies, and as such, some previously supported requests may no longer be approved. We continually update our Grants & Funding Opportunities page to provide additional information and resources. Please do not consider any requests approved until you have received formal written communication from the Vertex Grants Team.

What should I do if my supported event/activity/project changes after it was approved?

If the status of a supported request changes from what was submitted in the original request, the organization must immediately inform the Vertex Grants Team at vertex_grants@vrtx.com.

3. Grant Questions

Does Vertex provide unrestricted grants?

Vertex does not provide "unrestricted grants," which are funds that are not directed to a specific initiative or initiatives or are for general operating expenses. Grant requests must be for a designated initiative, and that is the only purpose for which the grant funds may be used. Vertex will not have control over the content of initiatives supported through a restricted grant.

What criteria does Vertex use to assess grant requests?

Vertex reviews all requests for the following:
- Alignment to areas of interest
- Project or program format
- Identification of need
- Learning objectives (if an Independent Medical Education ("IME") request)
- Target participants
- Funding amount requested (requests with multiple potential supporters preferred)
- Proposed outcomes (for IME) or impact assessment (for non-IME)
- Reasonableness of budget
- Funding history with the organization, including performance of previously funded activities and total amount awarded within a 12-month timeframe.

Does Vertex accept multi-year grant requests?
Vertex will accept requests for multi-year initiatives; however, the estimated start and end dates must be clearly defined. Please note that funding for multi-year initiatives may be provided as milestone payments requiring an interim report and budget update.

Who can answer any questions I have about the grants process?
Please contact the Vertex Grants Team with grant-specific questions to protect the independence of the grant review process and maintain approvability of the grant. The Grants Team oversees the review process and are best able to answer any questions you may have, including status of a request and which application best aligns with your request.

I'm submitting a grant request. What documents are required?
The following attachments must be provided, at a minimum:
1. Letter of Request
2. Gap Analysis/Needs Assessment (required for IME grant requests only)
3. Learning Objectives (required for IME grant requests only)
4. Agenda/Activity Overview
    * For an event, this may be just an agenda including a needs assessment. For a project, a comprehensive proposal, including description of your program or project and a summary of how the requested funding will be used is required.
5. Outcomes Analysis Plan
6. Project/Program Budget
    * The project/program budget should be detailed, with a breakdown of costs for each line item, a clear explanation of the units, and the total cost. Budget costs should be reasonable and customary, within fair market value, proportionate to the type and length of activity or project, and in compliance with applicable, laws, codes, and regulations. The budget should also list anticipated income from other sources, including additional financial support, advertising income, or registration fees.
7. Annual Budget or Form 990 (required for non-IME grant requests only)
    * The Annual Budget is the total operating budget for your organization, including overall income and expenses.
8. W8/W9
    * If you are a US organization, submit a W9, and if you are an ex-US organization, you must submit a W8. If you need a copy of the form or assistance with completing it, please contact vertex_grants@vrtx.com.
    * W-8 forms are Internal Revenue Service (IRS) forms that foreign businesses must file to verify their country of residence for tax purposes, certifying that they qualify for a lower rate of tax withholding.
9. Accreditation Certificate (if activity is accredited, and required for IME grant requests only)
10. Honorarium and Reimbursement Policy (required for IME grant requests only)
    * This policy should outline how your organization compensates planners, speakers, and/or authors of an educational activity and reimburses any expenses the planners, speakers, and/or authors incur traveling to the educational activity. If your organization does not have a policy, please upload a document that indicates that no policy exists.
11. Industry Attendance Guidelines (required for IME grant requests only)

- This document should outline the rules that industry employees must follow if attending the educational activity. If your organization does not have industry attendance guidelines, please upload a document that indicates no guidelines exist.

12. Board of Directors

If you have any questions about any of the required attachments, contact vertex_grants@vrtx.com.

What do we need to include in our grant budget?

Budgets must be limited to a reasonable estimate of the cost of the funded activities. A budget template should include:

- Full program/project cost.
- Proportion of the program/project requested to be funded by Vertex.
- Program/project details broken down by major categories (e.g. costs associated with program/project development, program/project delivery, venue charges, enduring material costs) and per-person costs for any transfers of value to attendees, faculty and staff (e.g., honoraria).

A budget template is available as needed, but it is not required for any grant requests. If you would like a copy of the budget template, please email vertex_grants@vrtx.com.

What is required for a grant reconciliation?

Upon completion of the initiative, as outlined in the Letter of Agreement, the organization shall provide the following information:

- Detailed report of the initiative.
- IME grants require additional outcomes, including an analysis of learner change data.
- Proof that Vertex's support was disclosed appropriately.
- A reconciliated budget, outlining how Vertex's funds were spent.
- Any items that would constitute a transfer of value.

The reconciliation report will be sent to the organization from the Vertex Request Management System the day after the grant period ends.

4. Sponsorship and Corporate Membership Questions

Can I discuss my sponsorship and/or corporate membership with my Vertex contact?

Yes, you may discuss your sponsorship request with your Vertex contact. Please note your Vertex contact cannot provide verbal or written approval, and all requests must be formally submitted through the Vertex Request Management System before a final decision can be communicated.

If a for-profit conference organizer is arranging a sponsorship opportunity on behalf of a non-profit organization or society/association, who should register in the system?

If the sponsorship agreement will be between all three parties (Vertex, the for-profit conference organizer, and the non-profit society/organization), please have the organization that will receive the funds register in the system. It is up to the conference organizer and non-profit to determine who should submit the sponsorship request.

The application has a question that asks for information on the partner organization.

I'm submitting a sponsorship request. What documentation is required?
1. Letter of Request
2. Agenda and/or Activity Overview (Draft forms are acceptable)
3. Levels of Sponsorship/Benefits
    - The Levels of Sponsorship/Benefits should be the Tangible Benefits (defined above) that are available to all sponsors of the supported request.
4. Program budget
    - The Program budget is the budget for the requested event, congress, program, or activity.
    - If your organization cannot share the program budget, please submit the organization's annual budget.
5. Board of Directors

The sponsorship initiative has ended. What do I need to do next?
Upon completion of the initiative, as outlined in the Letter of Agreement, the organization shall provide Vertex a summary of the supported request, such as high-level information about attendee participation and evidence of Vertex benefits. The reconciliation report will be sent to the organization from the Vertex Request Management System the day after the sponsorship ends.

We ask organizations to provide the following:
- Confirmation the event occurred, such as a final brochure.
- Documentation that Vertex received the benefits outlined in the request.
- A non-identifiable summary of attendee data, such as the number of participants. Estimate is acceptable.

I'm submitting a corporate membership request. What documentation is required?
1. Corporate Membership Brochure
    a. The Levels of Corporate Membership Benefits should outline the Tangible Benefits (defined above) that are available to all corporate members of the supported request.

The corporate membership has ended. What do I need to do next?
Upon completion of the initiative, the organization shall provide Vertex a final list of members and confirm that Vertex had access to the benefits outlined in the application. The reconciliation report will be sent to the organization from the Vertex Request Management System the day after the corporate membership ends.