

Annual Meeting Participation Grant Submission Guidelines

Last Updated: December 2020

1. GRANT OVERVIEW

a. Application timeline

- **Open call for Participation Grant Applications:** December 18, 2020
- **Deadline to submit a Participation Grant Application:** January 18, 2021, at 11:59 PM Mountain Standard Time
- **Successful/Unsuccessful Application Notification:** March 1, 2021
- **Applicant Confirm Grant Acceptance:** March 15, 2021

b. Important Documents and Links

Online application platform: <https://htai.eventsair.com/htai-manchester-2021-am/participation-grant-portal>

2. PURPOSE

HTAi offers Participation Grants (former Travel Grants) to support HTA stakeholders who would otherwise not be able to attend the HTAi Annual Meeting for the purpose of contributing their expertise, presenting their work or otherwise benefitting from participation in the global HTA community. Participation grants are offered for both methods of attendance, in-person and virtual participation. These grants are funded directly by HTAi and in some cases, are sponsored by external parties on an unconditional basis.

3. ELIGIBILITY

To be eligible for an HTAi Participation Grant, applicants must qualify to represent one of the following groups:

a. Applicant resides in a low- or middle-income country (as defined by the World Bank Link); Please note: Individuals temporarily residing in a high-income country but maintaining permanent residence in a low or middle-income country may apply for an HTAi Participation Grant. However, preference may be given to individuals currently residing in low- or middle-income countries.

b. Applicant is a patient or care-giver who can provide patient insights relevant to health policy and HTA and is associated with a not-for-profit patient engagement network. (Letter of confirmation from organization represented must be provided.)

c. Applicant is a full-time student enrolled in a post-secondary education program or course for HTA. (Certificate of enrolment must be provided.)

In addition, the applicant must meet at least one of the following criteria:

- a. Be a participant in the submission of an abstract for a panel or workshop or have an abstract submitted for an oral, vignette or poster presentation;
- b. Demonstrate a current link (volunteering, employment or academic) to an HTA agency, government body, or academic research center, or to another area of the health system with clear relevance to the field of HTA;
- c. Demonstrate clear interest in becoming involved in the field of HTA (e.g., through study or the establishment of HTA activities in the applicant's jurisdiction). Applicants must provide a letter of support in relation to becoming involved in the present or the future.

HTAi strives to support as many individual participants from as many different organizations as possible. Consecutive applications and applications from individuals from the same organizations are welcome. However, additional scoring points will be granted to those applicants who have not received a Participation Grant (former Travel Grant) in the last two years and there may be only one recipient from each organization to allow for diversification of funding.

4. APPLICATION PROCESS AND TIMELINE

a. Application Requirements

All applicants are required to complete the HTAi Participation Grant Application Form and submit it electronically, through the HTAi online Application Platform ([LINK](#)), along with all requested supporting documentation. HTAi will accept proposals by email (annualmeeting@htai.org) for those with extenuating circumstances (e.g., visually impaired).

b. When applying for a grant, applicants must submit:

b.1. Details about their organization, (its not-for-profit status, contributions made by for-profit organizations and its interest in HTA) and/or a letter confirming contribution or involvement from the organization the patient applicant is involved in (if applicable);

b.2. If a student, certificate of enrolment, indicating educational institution and HTAi related program and/or courses (if applicable);

b.3. A letter of support in relation to becoming involved in HTA in the present or the future (if applicable);

b.4. A statement explaining why they are applying for a grant for the Annual Meeting. Applicants should describe their involvement and how they plan to implement what they have

learned at the Annual Meeting in their own organization and patient networks, or to their studies as the case may be;

b.5. An estimate of the direct travel (if relevant for chosen method of attendance), accommodation (if relevant for chosen method of attendance) and registration costs that the applicant expects to incur to attend the Annual Meeting and any costs that their own organization can't cover (**expenses eligible to be covered by HTAi Participation Grants include economy travel, accommodation for the duration of the Annual Meeting and meeting registration costs at the early bird rate**);

b.6. A statement confirming that they have read and understood the Participation Grant Guidelines and post meeting requirements (for details see 6. Post Meeting Requirements).

c. Changes to the Application

After the Participation Grant submission deadline, no changes to the content of the application can be made.

d. Timeline

- **Open call for Participation Grant applications for HTAi Annual Meeting 2021 in Manchester:** December 18, 2020
- **Application deadline for the HTAi Annual Meeting 2021 in Manchester:** January 18, 2021, at 11:59 PM Mountain Standard Time
- Receipt of submission will be acknowledged via e-mail.
- **Notification of abstract outcome for the HTAi Annual Meeting 2021 in Manchester:** February 1, 2021
- **Notification of Participation Grant application outcome to attend HTAi Annual Meeting 2021 in Manchester:** March 1, 2021
- **Registration deadline (for successful Participation Grant recipients) for the HTAi Annual Meeting 2021 in Manchester:** March 25, 2021.
- No late applications will be considered under any circumstances.

e. Scoring of Applications

Applications are scored and ranked according to a standardized scoring framework and grants are allocated accordingly. The scoring is undertaken by the Participation Grant Application Review Panel. Applicant scores will be made available to the HTAi Secretariat for administrative purposes, as well as members of the HTAi Executive Committee, the HTAi Board and the Annual Meeting Committee for quality checks and process oversight.

All HTAi Annual Meeting Participation Grant applications are scored according to the following criteria:

e.1. Eligibility group and criteria (please see 3. Eligibility)

e.2. Relation to HTA

Applicants are asked to explain their relation to HTA in current position (work/study/volunteering/patient care-giver)

e.3. Involvement/contributions to HTAi (optional)

e.4. Extent to which the applicant's attendance is likely to advance HTAi's mission to promote the development, understanding and use of HTA

e.5. Applicant's attendance at previous Annual Meetings and receipt of Participation Grant funding in previous years

f. Identical Scores

If the situation arises where top candidates receive identical scores, the HTAi Secretariat will consider secondary characteristics in the allocation of funding, in the following descending sequence of importance:

- Where scores are equal, preference will be for those who can provide confirmation from an HTAi Interest Group Chair of their active involvement in an HTAi Interest Group;
- If individuals were past recipients (where scores are equal, preference will be for those who have received fewer Participation Grants (former Travel Grants) in the past or those who are confirmed active members of an HTAi Interest Group) Geographic location (where scores are equal, preference for geographic diversity with respect to other grant recipients will be granted)
- Gender balance (where scores are equal, preference will be for gender balance).

g. Results & Acceptance by Applicant

Successful applicants will be notified by email by March 1, 2021 and must confirm acceptance by return e-mail within the given time frame, March 25, 2021. Furthermore, **successful applicants must register by the Annual Meeting Early Bird Registration Deadline (March 25, 2021). Failure to do so will result in the loss of the Participation Grant, which will be awarded to the next highest scoring applicant on the waiting list.**

All decisions related to Participation Grants by the Executive Committee are final.

h. Transferability of Participation Grants

Participation Grants are non-transferrable, with no exceptions. **If a recipient is unable to accept or utilize a Participation grant for any reason, the recipient must inform the Secretariat at annualmeeting@htai.org and that grant will be awarded to the next highest**

scoring applicant. Those that do not notify the Secretariat in this regard and do not attend the Annual Meeting may not be considered for future Participation Grant awards.

- i. Changes to the attendance method (switch between in-person and virtual attendance) are possible, however, costs can only be reimbursed at the value of the awarded grant and based on the cost incurred, proven by invoice and submitted by expense reimbursed.

5. VALUE

Successful applicants will be notified by email prior to the Early Registration Deadline **and must confirm acceptance by return email.** Grant amounts will reflect:

- a. The grantee's score relative to other applicants
- b. Applicant's estimated costs to attend the Annual Meeting (dependent on their chosen method of attendance)
- c. HTAi's overall budget approved by the HTAi Board for Participation Grants, including any amounts received from sponsors/donors.

Expenses eligible to be covered by HTAi Participation Grants include economy direct travel, transportation (from and to airport/train station), accommodation for the duration of the Annual Meeting and meeting registration costs at the early bird rate. Travel times can include, and are limited to no more than, 1 night before and 1 night after the official conference days. **HTAi membership fees, travel insurance, per diems and incidentals are not eligible expenses.** The grant **maximum** for Manchester 2021 is USD 2,200.00 per individual for in-person participation and the Early-Bird virtual registration fee (depending on participant category) for virtual attendance.

6. POST ANNUAL MEETING REQUIREMENTS

Successful applicant(s) will be asked to provide (1) a detailed expense report identifying all expenses incurred, including ALL receipts for those expenses, a completed wire transfer form to allow for payment and (2) an Annual Meeting Attendance Report to the HTAi Secretariat no later than one month after the last day of the Annual Meeting. Eligible expenses are:

- **Economy direct travel;**
- **Transportation (from and to airport/train station);**
- **Accommodation for the duration of the Annual Meeting;** Travel times can include, and are limited to no more than, 1 night before and 1 night after the official conference days.
- **Meeting registration costs at the early bird rate.**

HTAi membership fees, travel insurance, per diems and incidentals are not eligible expenses.

The Annual Meeting Attendance Report must include the applicant's views regarding the following items:

HTA in low or middle-income countries: impressions of the meeting and areas of application in their field of expertise and country of residence.

Patients' involvement in HTA: impressions of the meeting and areas for improved interaction with patients.

HTA students: impressions of the meeting and areas of application in their field of study.

The report must be completed and submitted no later than one month after the last day of the conference. Participation Grant funds will only be released after submitting the report. Reports must be completed and submitted electronically (to annualmeeting@htai.org). If required, editing may be completed by the HTAi Secretariat and the reports may be showcased on the HTAi website. By submitting a Participation Grant application, Participation Grant recipients confirm their consent to have their report published online, e.g., on the HTAi website, Annual Meeting website, HTAi Social Media channels, and to use it for marketing and promotional activities.

7. PAYMENT OF GRANTS

Grant funding will be released no sooner than 30 days after the last day of the Annual Meeting and only after ALL necessary documentation has been completed as required.

Recipients will be required to submit a detailed expense report providing a description of expenses incurred, including valid receipts for ALL expenses, a wire transfer form and an Annual Meeting Report of Attendance. All required forms completed in their entirety **must be submitted to the HTAi Secretariat annualmeeting@htai.org no later than 30 days after the last day of the Annual Meeting.** All payments will be converted to USD (unless applicant is a Canadian resident, in which case expenses will be converted to CAD). We are able to release the funds in any unrestricted currency. Where the currency is restricted, the recipient must have an account that is able to accept USD. Any fees levied by the recipient's banking institution are at the cost of the recipient. Grants may only be paid to individuals, and cannot be made to organizations. Reimbursement will be provided for eligible expenses only. Should the eligible expenses exceed the amount of the Participation Grant award, **reimbursement will be provided for the awarded amount only.**

The Secretariat does not pay for any costs in advance of the Annual Meeting under any circumstances. The recipient is responsible for paying all costs related to their attendance of the Annual Meeting and must submit an expense claim detailing those costs in order to be reimbursed.

No funding will be released if the respective Annual Meeting country does not grant a travel visa to the applicant, thereby preventing the applicant from participating at the Annual Meeting.

8. RESPONSIBILITY & ADMINISTRATION

HTAi's Annual Meeting Committee has the overall responsibility to provide a standardized process for awarding HTAi Annual Meeting Participation Grants (former Travel Grants). This includes the HTAi Annual Meeting Participation Grant Guidelines, the Participation Grant Application questionnaire, and a standardized scoring framework and decisions on responsibility of tasks.

The HTAi Secretariat is responsible for the management and administration of the respective Annual Meeting Participation Grants, including initial review of applications. The Participation Grant Application Review Panel, with the support of the HTAi Secretariat, will provide recommendations to the Executive Committee, who will review all scores assigned and arrive at final rankings and awarding decisions.

All communications regarding the Notification of Acceptance for Participation Grants or payment of Participation Grants will be processed by the HTAi Secretariat.

9. APPEAL

All decisions related to Participation Grants are final.

10. CONTACT

HTAi Secretariat
Telephone: +1 780 448 4881 ext. 234
Fax: (780) 448-0018
E-mail: annualmeeting@htai.org

11. FREQUENTLY ASKED QUESTIONS

Q: Who is eligible to apply for the HTAi Annual Meeting Participation Grant?

A: HTAi offers Participation Grants to support HTA stakeholders who would otherwise not be able to attend the HTAi Annual Meeting for the purpose of presenting their work or otherwise benefiting from participation in the global HTA community. HTAi provides Participation Grants to three different groups of applicants. Please see the detailed list of eligibility criteria under 3. Eligibility.

Q: If I am eligible, am I guaranteed the grant?

A: No. In addition to the eligibility criteria, every applicant has to provide further information that will be scored and compared to other Participation Grant Applications. Successful applicants will be notified by email and **must confirm acceptance by return email and register for the Annual Meeting prior to the Early Bird Registration Deadline (March 25, 2021)**. For more details please see 4. Application Process and Timeline.

Q: I applied and received the HTAi Annual Meeting Participation Grant before; can I apply again?

A: HTAi strives to support as many individual participants as possible. Consecutive applications are welcome. However, additional scoring points will be granted to those applicants who have not received a Participation Grant in the last two years to allow for diversification of funding. If you were previously successful in receiving a Participation Grant award, did not attend the Annual Meeting for which the grant was provided, and did not notify the Secretariat in advance that you would not be attending, you may lose future considerations for Participation Grant awards.

Q: Where can I find the HTAi Annual Meeting Participation Grant Application Form?

A: All applicants are required to complete the HTAi Participation Grant Application Form and submit it electronically, through the HTAi online Application Platform ([LINK](#)), along with all requested supporting documentation. HTAi will accept proposals by email (annualmeeting@htai.org) for those with extenuating circumstances (e.g., visually impaired).

Q: What is the deadline to submit my application?

A: The deadline to submit your application for a Participation Grant is January 18, 2021

Q: What type of expenses are eligible for funding?

A: Expenses eligible to be covered by HTAi Participation Grants include:

- economy direct travel;
- transportation (from and to the airport/train station);
- accommodation for the duration of the Annual Meeting;
- meeting registration costs **at the early bird rate**.

HTAi membership fees, travel insurance, per diems and incidentals are not eligible expenses.

Q: What level of funding can I expect to receive if my application is successful?

A: Grant amounts will reflect:

- The grantee's score relative to other applicants' scores.
- Estimated costs for the applicant to attend the Annual Meeting.
- HTAi's overall budget approved by the HTAi Board for Participation Grants, including any amounts received from sponsors/donors.
- The grant **maximum** for Manchester 2021 is USD 2,200.00 per individual for in-person participation and the Early-Bird virtual registration fee (depending on participant category) for virtual attendance.

Q: If I am offered a Participation Grant, how do I collect my award?

A: Grant funding will be released only after grantees have incurred expenses and submitted an expense statement with ALL relevant receipts, a wire transfer form and a Report of Attendance. Grants may only be paid to individuals, and cannot be made to organizations. For more details, please see 7. Payment of Grants

Q: When can I expect to receive payment of my Participation Grant (reimbursement of expenses)?

A: The HTAi Secretariat follows a required review and approval process that all expense claims must undergo. In addition, because of summer vacation schedules, timelines to process reimbursements can be from 30-60 days after receipt of a claim. Every effort will be made to process reimbursements as soon as possible and by no later than August 31 of the year of the Annual Meeting.

Q: What if my travel plans change after I complete my application?

A: The maximum amount of awarded Participation Grant will stay the same and cannot be adjusted to changed travel plans. **No funding will be released if the respective Annual Meeting country does not grant a travel visa to the applicant, which would result in preventing the applicant from participating at the Annual Meeting.**

Q: Can I receive payment of my award before my departure date?

A: No. Participation Grant recipients must pay all related costs and submit an expense claim with ALL related receipts to be reimbursed after the Annual Meeting.

Q: What if my travel plans are affected by local or international travel restrictions?

A: Every effort should be made to plan for potential disruptions to travel plans (e.g. adhering to cancellation periods, flexible ticketing options, etc.). However, non-refundable travel tickets or accommodation bookings made:

- after notification of a successful Participation Grant application and,
 - which meet the criteria set out in the HTAi Participation Grant guidelines
- may be eligible for reimbursement. Each request will be considered individually by the HTAi Secretariat and processed according to the reimbursement timeline.

Q: Is there a minimum or maximum length of time for travel?

A: Travel times can include, and are limited to no more than, 1 night before and 1 night after the official conference days. The official conference days for the HTAi Annual Meeting in Manchester are from Saturday, June 19, to Wednesday, June 23, 2021. Travelling on alternative dates should be of a cost-saving or comparable price. Please demonstrate this in your supporting information.