

Conference Budget Guidelines

If the budget falls within these guidelines, industry support to a Partners Educational Activity may be approved by Staff without presenting it to the full ERB. A budget falling outside of these guidelines might be permitted, but it would need to be reviewed by the ERB.

All commercial support must be spent on expenses associated with the supported Partners educational program. Because the educational program is receiving commercial support, the ERB also reviews the expenses paid by tuition/registration proceeds and/or departmental funds, in order to ensure that the commercially supported program is not lavish and is appropriate.

1. Food

- a.** Meals provided at educational activities cannot compete with or take precedence over the educational event. Therefore, meals, snacks, and beverages should be reasonable and appropriate for an academic program (subject to sections 1(d) and 1(e) below). Rates should reflect the prevailing rate at the venue, and in general, meals held in conjunction with an education activity should be held where the meeting is held.
- b.** Commercial support may be used to pay for food and drinks offered during the educational program. However, commercial support may not be used to pay for meals that take place after the educational event has ended (e.g., a dinner that has no educational component).
- c.** Commercial support may be used to pay for a dinner involving faculty for the course, as long as it is a legitimate planning dinner. No commercial support may be used for any spouses, industry attendees, or other individuals who are not involved in planning the content of the educational activity.
- d.** If a Partners hospital will pay for the food and beverage expenses associated with the educational activity, the program must comply with the requirements for Directly Sponsored Events pursuant to the Partners Policy and Procedures for Employee Business Expenses.¹
- e.** If a department is holding the educational activity with an outside accredited provider, academic institution, or professional society and that outside institution will make the payments for the food and beverage expenses, the meals provided during the event should be modest. If the venue provides different meal packages, the program should select one of the lower-cost options that will also accommodate the activity occurring during that meal. For example, if there will be a lecture during the meal, it

¹ Partners Policy and Procedures for Employee Business Expenses (III)(G).

is permissible to choose a lower-cost plated option rather than a buffet option even if the plated option is more expensive than the buffet option.

2. Venue Expenses

- a. The venue selected for the activity should be reasonable and appropriate for an academic program. The following venues are considered reasonable and appropriate and are therefore permissible: any room in a Partners facility, an academic auditorium or conference room, and a hotel included in the Partners Preferred Hotels for Daytime Events (available at: <http://pulse.partners.org/howto/hotels/preferredhotels.htm>). Also, venues should be located in or geographically close to the Partners hospital hosting the event. If the venue selected is a hotel that does not participate in the Partners Preferred Hotel program, the venue selection must comply with the requirements for Directly Sponsored Events pursuant to Partners Policy and Procedures for Employee Business Expenses. If your department is holding the educational activity with an outside accredited provider, academic institution or professional society and that outside institution will make payments to the venue, it is permissible to select a hotel that does not participate in the Partners Preferred Hotel program. However, the venue should be located geographically close to the Partners hospital hosting the event and the venue should be reasonable and appropriate for the academic program.

3. Speaker Expenses (these expenses cannot cover attendees who are not faculty² of this program)

- a. Speakers' lodging, food, and ground transportation should be reasonable and at the prevailing rates for the locale of the activity. In general, speakers' food and lodging should be covered for the duration of days of the conference necessary to give their talk; these expenses should not be paid for any days in which a speaker is attending the conference as a non-faculty participant. If the department wishes to cover speakers' food and lodging beyond the time period required to cover his/her talk, the department must justify why it is appropriate for the speakers' expenses to be covered (e.g., the speaker is giving a talk on day one, but will have a continuing role in the program for the remaining days). Speakers' airfare costs should follow the Partners Policy for Employee Business Expenses (coach within continental US).

² It can often be difficult to distinguish faculty/speakers from learners. For the purposes of these guidelines, speakers are considered to be a limited number of individuals who provide formal content at an educational activity. In no event shall all participants at an educational activity be considered "faculty." Generally, speakers are invited to speak on a particular topic and would agree to speak regardless of whether they planned on attending the activity as a learner. Merely presenting a poster or a case is not sufficient to be considered "faculty." The ERB can review cases on a case-by-case basis to determine whether certain individuals should be considered "faculty."

- b. Speakers' honoraria should not exceed \$2500/day/speaker. It is acceptable to compensate speakers for travel days.

4. Administrative Expenses

- a. Administrative staff salary shall be reasonable based on the size of the event.

5. Other Expenses

- a. A/V, advertising, printing, and production costs shall be reasonable based on the size of the event.
- b. Hospital and Department Overhead are appropriate expenses to list in the budget. If listing Department Overhead, provide an explanation as to what expenses are charged the departmental overhead rate, and how it differs from the hospital overhead rate.
- c. An Accreditation Fee is also a reasonable expense to list in the budget. The accreditation fee should be the standard rate charged by the accredited provider.

6. Tuition/Registration

If tuition/registration is charged, and there is a surplus upon completion of the program, the department must use the surplus on next year's conference or departmental programs in furtherance of the educational mission of the hospital.

7. Expenses which Cannot be Covered with Commercial Support

In general, commercial support cannot cover the following conference expenses:

- a. Attendee expenses (e.g., travel, parking)³ may not be covered with commercial support. A department may use non-industry funds to cover attendee expenses. If a department uses non-industry funds to cover attendee expenses, it should be incorporated into the conference budget.
- b. Social events may not be covered with commercial support and should not be incorporated into the budget of any industry-supported Partners educational program. Departments can put on social events as events that are separate from the industry-supported Partners educational program. If a Partners hospital will pay for the expenses incurred for the social event, please ensure that it complies with the requirements for Directly Sponsored Events pursuant to the Partners Policy and Procedures for Employee Business Expenses.⁴
- c. Gifts for participants are prohibited at an industry-supported Partners educational program. Departments may not use commercial support or

³ Attendee expenses do not include scholarships, which shall be considered on a case-by-case basis by the ERB.

⁴ Partners Policy and Procedures for Employee Business Expenses (III)(G).

non-industry funds to provide gifts for participants at industry-supported Partners educational program.