



## Zimmer Biomet Grants and Donations



**ZIMMER BIOMET**  
Your progress. Our promise.™

Zimmer Biomet has an important role as a worldwide leader in the musculoskeletal healthcare industry. We are dedicated to restoring mobility, alleviating pain and improving the quality of life for patients around the world.

Zimmer Biomet has demonstrated industry leadership through corporate giving, which benefits patients who would not otherwise receive orthopaedic care; including support for charitable organizations and professional medical education.

All requests are reviewed by the Grants and Donation Review Committee, which is comprised of non-sales/marketing employees.

This brochure includes important information about Zimmer Biomet grant and donation programs.

State and federal transparency reporting laws may require Zimmer Biomet to disclose grant payments made directly or indirectly to healthcare professionals or healthcare organizations.

The Grants Office exclusively handles all questions and can be reached at [grants.AMER@zimmerbiomet.com](mailto:grants.AMER@zimmerbiomet.com).



## Funding for Educational Grants for Professional Medical Education

Zimmer Biomet provides educational grant funding to support independent educational conferences that promote scientific knowledge, medical advancement and the delivery of effective health care. Organizations with a genuine educational purpose or function may apply for an educational grant from Zimmer Biomet.

### Eligibility and Request Process:

- The requesting organization and payee must be the same entity and be a training hospital, medical university, or professional association.
- Requests received at least 60 days in advance of the educational event will receive full consideration by the committee.
- Support may not be provided to individuals in private practice. Zimmer Biomet never provides grants in exchange for an agreement to use, order, recommend, or purchase Zimmer Biomet products.
- The request for an educational grant must come from the organization itself and not from an individual physician or healthcare professional who is not an employee or affiliate of the organization.
- Requests must include:
  - A budget with anticipated revenue and detailed expenses
  - Program/Event agenda
  - Current W-9 Tax Form
  - Accreditation Documentation
  - Board of Directors listing
- Requests submitted will be reviewed by the committee based on objective criteria, including, but not limited to, number of overall education hours; financial need; educational focus in an appropriate musculoskeletal area; and the appropriateness of the location

- Funding decisions will be communicated via email soon after the committee meeting.
- Zimmer Biomet's decision to support a medical education program is contingent upon a signed letter of agreement between Zimmer Biomet and the requesting organization.

### Agreement

- **Accreditation Provider signature** If a meeting is accredited or providing continuing education credits, the accrediting entity, if separate from the requestor, must also sign the letter of agreement.
- **Date of agreement signature** The letter of agreement must be complete prior to the date of the meeting or event.
- Grants provided will generally only cover costs associated with the development, delivery, or evaluation of educational programs, resources, or materials.
- Zimmer Biomet reserves the right to revoke funding at any time for failure to adhere to the AdvaMed Code, all other applicable laws, Zimmer Biomet's procedural requirements, or the requesting organization's stated purpose for the award funds.

Requests for an educational grant must be submitted online at:  
**<http://www.zimmerbiomet.com/grants-donations>**

### Frequently Asked Questions:

What will cause a grant request to be declined?

- Requests from an individual or private practice
- Requests for education that are not within the scope of Zimmer Biomet's therapeutic areas
- Requests from an individual who is not in charge of the program or event
- Requests for personal expenses of an HCP







## Fellowship Funding

Zimmer Biomet provides funding to third-party non-profit organizations that have an independent application and review process for providing grants to fellowship programs. Third-party organizations may submit requests to Zimmer Biomet for funding considerations.

### OMeGA

Zimmer and Biomet individually have a history of supporting OMeGA Medical Grants Association. Zimmer was the founding supporter of OMeGA, which has provided funding for post-graduate orthopaedic fellowships and residency programs since 2009. Zimmer Biomet has no role in selecting the recipients of its funding, but does allocate to one or more specialty or sub-specialty areas that the company wishes to support. These funding areas may include: Adult Reconstruction/Arthroplasty; Shoulder and Elbow; Spine; Trauma; Sports Orthopaedic Surgery; Pediatric Orthopaedics; Foot and Ankle; Orthopaedic Oncology; Hand and Upper Limb Surgery; and Residency/Educational Resources.

Further information about OMeGA grants can be found at [www.omegamedicalgrants.org](http://www.omegamedicalgrants.org)

### Frequently Asked Questions:

#### **Can a university or hospital apply for a grant for fellowship studies from Zimmer Biomet?**

Zimmer Biomet provides funding to third-party funders. A university or hospital would not be able to apply directly to Zimmer Biomet, but could submit a request to an organization such as OMeGA, COTA and NREF.



# Resident Education Funding Program

Zimmer Biomet provides funding support to accredited residency programs to assist with educational efforts.

### Eligibility and Request Process

Requests should be for residency programs that are accredited.

The program director or coordinator must submit all funding requests.

Funding may be requested for:

- Travel and attendance a third-party educational courses  
Courses must be aligned with Zimmer Biomet’s therapeutic areas. General courses in practice management or board review will not be supported.
- Skills labs and cadaver sessions, monetary requests only
- Specimen expenses for lab
- Visiting professor expenses (Grand Rounds)

Requests for an educational grant must be submitted online at: <http://www.zimmerbiomet.com/grants-donations>

### Submission Deadline

Due Date	Decisions Communicated by	Academic Year
March 1	May	Upcoming Academic Year
September 1	November	Current Academic Year

### Frequently Asked Questions and Tips:

- Number of attendees should be the number of residents attending the program or educational event
- Program Name should note the residency program name and funding types being requested
- A budget must be included for all types of funding being requested
- Requests must include:
  - A budget with detailed expenses and revenue if applicable
  - Program or event agenda
  - Current W-9 Tax Form
  - Accreditation documentation, if applicable
  - Board of Directors listing
- Incomplete requests may not be considered









## Funding for Charitable Purposes

### National Non-Profit Organizations

Zimmer Biomet supports requests from national non-profit organizations, particularly in the field of musculoskeletal health for purposes such as public education and awareness, independent research efforts, general support of the organization's charitable mission, including those organizations addressing healthcare disparities among minorities. Zimmer Biomet also supports requests from non-profits serving local communities where Zimmer Biomet offices are located.

#### National Donation Requests

- Requests for charitable donations from Zimmer Biomet must be made in connection with a general fundraising effort by the charitable entity.
- Requests must be submitted by a national organization with a mission focused on improving musculoskeletal health
- Requests must be from a qualified non-profit with documentation of 501(c)(3) tax exempt status
- Requests must come from the organization itself, not an individual healthcare professional who is not an employee of the charity.
- Requests for capital expense drives or infrastructure costs should not be submitted

Requests must include:

- A budget with program expenses, and revenue
- Request letter detailing how funding will be used
- W-9 Tax Form
- Current 501(c)(3) Certification Form
- Board of Directors listing

Requests that meet the above guidelines may be submitted online to: <http://www.zimmerbiomet.com/grants-donations>

#### Local/Community Donation Requests

- Requests for charitable donations from Zimmer Biomet must be made in connection with a general fundraising effort by the charitable entity.
- Requests should be from a non-profit organization serving a location with a Zimmer Biomet office (or from a national organization with a widespread cause such as disaster relief)
- Requests must be from a qualified non-profit organization with documentation of 501(c)(3) tax exempt status
- Requests must come from the organization itself, not a healthcare professional who is not an employee of the charity.
- Requests must be submitted at least six weeks prior to the date funding is needed

Requests that meet the above criteria may be submitted to:

<http://www.zimmerbiomet.com/grants-donations>

#### Frequently Asked Questions:

##### Can an organization apply for funding more than once per year?

Funding requests should only be submitted once annually. Multiple funding options may be included within one submission. Past donation history does not guarantee a donation for the current year.

Requests must include:

- A budget with program expenses, and revenue
- Request letter detailing how funding will be used
- W-9 Tax Form
- Current 501(c)(3) Certification Form
- Board of Directors listing



## Product Donation Programs

### Medical Missions outside the U.S.

Zimmer Biomet considers product donation requests for medical mission trips occurring outside the US that meet the below criteria.

#### Eligibility and Request Process:

- Requestor is affiliated with a non-profit organization interested in medical missions
- Request is submitted at least 90 days prior to the date the items are needed
- Requestors are qualified medical professionals with the ability to use and prescribe the product requested
- Products requested will only be used for patients who are uninsured and unable to afford the services
- All required authorizations for regulatory, import, and export requirements with confirming documentation provided, are obtained by the requesting non-profit

Requests that meet the above guidelines may be submitted online to:

**<http://www.zimmerbiomet.com/grants-donations>**

Requests must be accompanied by all required documentation for consideration.

#### Medical Missions Frequently Asked Questions and tips:

##### Form Completion Helpful Hints:

- Check the box at the top of the form noting if you are requesting legacy Zimmer or Biomet product.
- Requesting surgeon name must be included in case there are questions about product lines and availability.
- Trip Location and Trip Date entries will be used for Regulatory screening and trip planning. It is crucial that these items are accurate at the time the form is submitted
- Date Products are Needed must be at least 90 days from the date the form is submitted. Requests submitted within the 90 day timeframe may not be fulfilled.
- Shipping Location must be to a US address. Zimmer Biomet's medical mission program only ships within the US. Import and Export of product must be completed by the non-profit.
- Read and sign including a date, and return using the submit button or by emailing grants.AMER@zimmerbiomet.com.
- Zimmer Biomet will provide a regulatory review of the destination country and the ministry of health authorization requirements and trade compliance review of the request against the restricted parties list. Internal inventory reviews, corporate compliance, and grant review committee reviews will also be completed on the request.

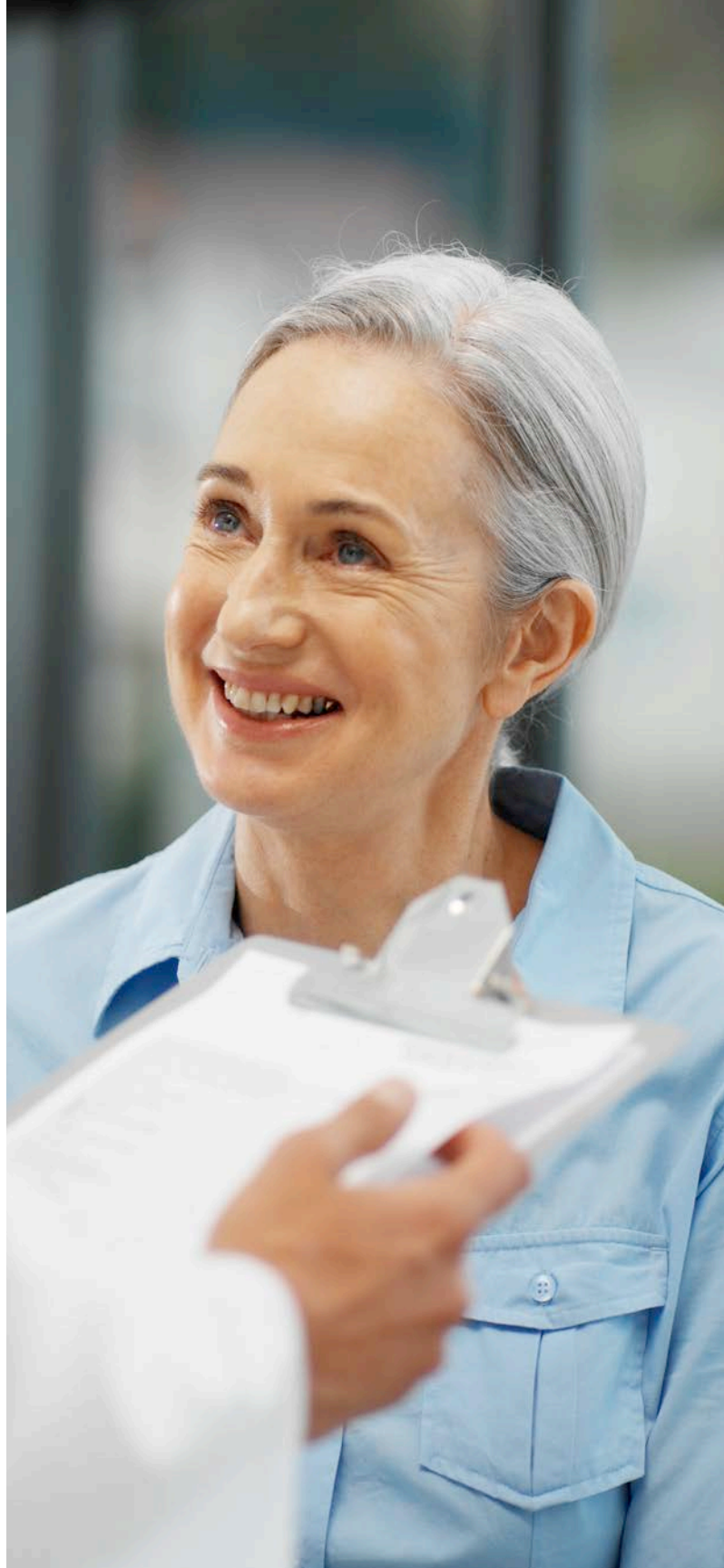
### Product List Helpful Hints:

- Upon request, the sales representative affiliated with the region may assist with product numbers and quantities for the items being requested.
- Quantities requested should reflect the number of patient surgeries planned. Excess inventory may not be provided due to the quantity of trips Zimmer Biomet supports.
- Legacy product lines may be provided if available, but updates will be provided if a change is made to the product list.

### Ministry of Health (MoH) Authorization Helpful Hints:

- Zimmer Biomet can confirm if an authorization is needed, and may be able to provide a sample document upon request. Most countries are adopting the MoH authorization requirement prior to allowing unregistered items to enter the country for charitable use.
- Ministry of Health contacts can be found via multiple web locations, the World Health Organization site is [http://www.who.int/medical\\_devices/countries/en/](http://www.who.int/medical_devices/countries/en/)
- The hospital in the country where your trip will occur will likely need to assist with obtaining the MoH authorization, as they will be more familiar with the local government and contacts.
  - o Obtaining the MoH authorization may only take a few weeks, but it can take several months depending on the country.
- If an authorization is required in the country where your trip will occur, Zimmer Biomet will not be able to provide product until the MoH document is obtained and approved through our Global Regulatory Department.

Questions about a mission request should be directed to: [grants.AMER@zimmerbiomet.com](mailto:grants.AMER@zimmerbiomet.com)





## Domestic U.S. Product Donations (Friends in Need)

Through a third-party organization, Zimmer Biomet provides product donations for U.S. charitable surgeries that meet the below criteria:

- AmeriCares facilitates donating Zimmer Biomet products to U.S. licensed physicians performing surgeries in the U.S. at no cost to patients who qualify for charitable assistance based on the standards used by the hospital in which the surgery will take place.
- Products to be donated will be pre-approved by AmeriCares, working in conjunction with the physician's Zimmer Biomet sales representative who will manage delivery of all approved products and instruments or loaner instruments to the operating room for the surgery.
- Operation Walk USA efforts are also processed through AmeriCares. More information on Operation Walk USA may be found at [www.opwalkusa.com](http://www.opwalkusa.com)

Requests that meet the above guidelines may be submitted to: <http://www.zimmerbiomet.com/grants-donations>

Questions about the program can be directed to AmeriCares Medical Outreach Program coordinator at: [medicaloutreach@americares.org](mailto:medicaloutreach@americares.org)

### US Donation (Friends in Need) Frequently Asked Questions:

#### **Can an insured patient receive a US product donation?**

Due to donation procedures, the patient must qualify for indigent care based on the hospital guidelines, and the surgeon performing the surgery must attest to the patient's eligibility. Therefore, insured patients most likely will not qualify for indigent care.

**Can Zimmer Biomet donate if the hospital plans to request partial payment from the patient?** The surgery must be charitable on all aspects to comply with the Zimmer Biomet Product Donation program, with hospital, staff and implant costs all donated.



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