

## GUIDELINES FOR APPLYING FOR FACILITY ENGAGEMENT (FE) FUNDING

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### BACKGROUND

The Kelowna General Hospital Physicians Society (KGHPS) receives annualized funding to support facility-based physician engagement. A Memorandum of Understanding on regional and local engagement provides support and funding to Medical Staff Associations to facilitate discussions among physicians and departments around issues that affect patients and the work environment.

Funding can be used to pay physicians for their time, hire staff and support prioritized projects and initiatives ranging from patient care and system improvements, to improving communication and consultation with the Health Authority administration. Initiatives can foster relationships and effective communication within and across physician groups and forge close communication, trust and shared accountability between physicians and health authority leadership while championing facility and system improvement.

### GUIDELINES:

- ◆ Any member of the Society is eligible to submit a proposal for funding consideration.
- ◆ Should a Project Manager/Facilitator be required to support the Physician Project Lead, his/her rate will not be greater than \$95.00 per hour and shall be dependent on their experience and responsibilities in facilitating the project. The Society's approval will be required for any hourly rate above that amount.
- ◆ The overall costs for the contracted Project Manager/Facilitator shall not exceed 50% of the overall project budget. A Project Manager/Facilitator will be required to sign an Independent Contractor Agreement which will, among other things, confirm their hourly rate.
- ◆ The Society's Director, Facility Engagement can assist in determining appropriate costs.
- ◆ The Project Lead, in conjunction with the Director, Facility Engagement, will review costs associated with the facilitator's fees on an ongoing basis.
- ◆ Applicants are to complete the Facility Engagement Funding Application Form (attached) or apply on-line through the KGHPS website ([www.KelownaPhysiciansSociety.ca](http://www.KelownaPhysiciansSociety.ca)). Completed forms are to be submitted to the Director, Facility Engagement by emailing [KGHPhysiciansSociety@gmail.com](mailto:KGHPhysiciansSociety@gmail.com). On-line forms will be automatically forwarded.
- ◆ The Working Group members will conduct an initial review of the proposal and identify any issues or concerns requiring clarification.
- ◆ The FE Project Lead will have the opportunity to revise their original proposal based on feedback received.
- ◆ The revised FE proposal will be recirculated to the Working Group members to evaluate using the on-line evaluation survey tool via Survey Monkey.
- ◆ For FE proposals with an estimated cost greater than \$20,000, the Project Champion will be invited to attend the Working Group meeting to speak further to the proposal and answer questions.
- ◆ The FE proposals with their collective scores and any commentary from presentations will be reviewed at the next scheduled Working Group meeting. Recommendations to approve funding will be made based on the scoring, alignment with KGHPS strategy and support from the Society. Some initiatives will require Health Authority support to proceed.

- ◆ The KGHPs Board of Directors is accountable for making decisions to approve FE proposals.
- ◆ The Director, Facility Engagement notifies the FE Project Lead of the KGHPs decision to fund (or not) their initiative. Both the KGH Health Services Administrator and Chief of Staff are included in the notification.
- ◆ The approved FE project or initiative is set up in the FEMS (Facility Engagement Management System) with the allocated budget and a stop date no later than March 31<sup>st</sup> within the fiscal year. Participants are added to this Engagement Activity (EA) within FEMS and can claim approved sessional hours against this budget.
- ◆ Sessional fees must be claimed within ninety (90) days of the activity date; otherwise they may be subject to denial of the claim.
- ◆ Should an extension of the project deadline be required, the Project Lead can submit their request to the Society.
- ◆ If the costs for the project are anticipated to be overbudget, the Project Lead will advise the Society as soon as the potential overage is identified.
- ◆ The Project Lead is responsible for submitting a final report to the Chair, Working Group Committee on the outcome of the project or initiative with progress reports at the six-month mark if the project is not complete or of a longer duration.

## FUNDING RESTRICTIONS<sup>1</sup>

Facility Engagement funding cannot be used for the following:

- ◆ Advertising with the exception of physician recruitment ads.
- ◆ Compensation for clinical services.
- ◆ Purchase of real estate and vehicles.
- ◆ Purchase of clinical equipment.
- ◆ Donations to charities or political parties.
- ◆ Meeting attendance that is presently required as part of maintaining privileges.
- ◆ Physician research and quality projects. Includes research projects aimed at generating new knowledge, testing new practice, theory or intervention or conducting control studies.
- ◆ Training - physician sessionals and expenses for attending CME accredited clinical training.
- ◆ To pay physician sessional time to attend events where the primary intent is to socialize.
- ◆ Costs related to fitness or social activities (e.g., gym memberships, ski tickets, golfing fees, yoga sessions).
- ◆ Compensation or expenses for individuals who do not have a direct role in Facility Engagement (i.e., family members).

*Original Guideline Approved: KGHPs Board of Directors*

*Date: May 11, 2017*

*Revised Guideline Approved: KGHPs Board of Directors*

*Date: May 9, 2019*

*Revised Guideline Approved: KGHPs Board of Directors*

*Date: October 3, 2019*

*For review: October 2020*

<sup>1</sup> New Facility Engagement Funding Guidelines updated July 2019, Doctors of BC.

# KGHPS FACILITY ENGAGEMENT FUNDING APPLICATION

**Please Note that as of April 1, 2019 all FE Projects are funded on an annual basis with projects closing no later than March 31<sup>st</sup> of the fiscal year. Physician Leads can re-apply for funds to carry over into next fiscal year. Sessional fees must be claimed within 90 days of the meeting date.**

## 1. Project Identification

**Project Title:**

**Expected Timeframe:**

**Total Funding Amount Requested:**

**Submitting Department(s) / Division / Group:**

**Name of Principal Physician Applicant:**

**Names of other participating physicians and/or medical staff:**

**Project Manager:**

**Main Contact Name (s):**

**Phone:**

**E-mail:**

**Application completed by (name):**

## 2. Statement of the Problem or Need

Concisely summarize the issue and relevant background information, i.e. what led up to the issue? How has it evolved? Describe the current situation. What problem / need is the project designed to address?

## 3. Area(s) of Impact

Identify all areas that resolution to this issue would affect.

- |   |  |
|---|--|
| <input type="checkbox"/> Patient Care                               | <input type="checkbox"/> Patient Safety                      |
| <input type="checkbox"/> Physician Work Environment                 | <input type="checkbox"/> Use of Allied Health Professionals  |
| <input type="checkbox"/> Population Health                          | <input type="checkbox"/> Electronic Systems                  |
| <input type="checkbox"/> Reduction in Per Capita Cost               | <input type="checkbox"/> Communication with Physicians       |
| <input type="checkbox"/> Capacity & Flow                            | <input type="checkbox"/> Communication with Health Authority |
| <input type="checkbox"/> Physicians Representation/Input Mechanisms | <input type="checkbox"/> Delivery of Program Services        |
| <input type="checkbox"/> Other (please specify)                     | <input type="checkbox"/> Passion & Energy                    |

#### 4. How will the funds be used? Project Deliverables and Beneficiaries

Describe the objective of the project; how funds will be used and potential outcomes. What is the project designed to achieve, create or deliver? Please identify who will derive benefit from the expected outcome.

#### 5. Strategic Context

Explain how the project relates to the vision/mission of the KGH Physicians Society as well as the strategic goals of hospital / Interior Health.

#### 6. Time Factors

How long is the intended project to last? Are there any deadlines to consider? Please note funding for FE Projects is annualize and does not carry over automatically into next fiscal year.

#### 7. Special Provisions

Are there any environmental factors, such as regulatory requirements, ethical considerations or legal ramifications to be considered?

### 8. Related Projects

Identify any other projects that may be related to this one or that may be affected by this initiative.

### 9. Project Assumptions and Constraints

Identify any assumptions or constraints that have been identified, i.e. any factors that are considered to be true and will be assumed to be true during the duration of this project or anything that will restrict the ability to successfully achieve the project objectives.

### 10. Health Authority (HA) Engagement

Note: Any proposed activities involving patient care, flow, environment, data analytics, allied health, resources for sustainability would benefit from early consultation with HA.

Indicate how/if the HA has been/will be informed of the activity, consulted with, involved, and/or a collaborative partner, as applicable.

- This project would benefit from HA involvement as it required input, data, implementation, financial or in-kind resources, etc.
- I need help finding the appropriate HA contacts.
- I am aware of the appropriate HA contacts and have included them below:

Name	Title	Department	Contribution

### 11. Evaluation Plan

Indicate how you will assess whether the activity’s objectives are being met. Consider **how** and **when** data (i.e., indicators) will be collected and analyzed. Please advise if you require assistance developing an evaluation plan.

## 12. Project Expenses

(As of April 1, 2019, sessional fees per hour are: Specialists - \$158.97; General Practitioners \$134.77 maximum meal expenses for dinner is \$75.00 per person (including taxes, gratuities and service fees).

**NOTE:** The Director, Facility Engagement can assist you in developing the Project Budget within the guidelines.

### Implementation Expenses:

(For larger, more complex projects expenses can be divided into planning, implementation, evaluation or dissemination phases – please work with the Facility Engagement Director to assist you in developing the budget.)

### Post-Implementation Operational Expenses:

Signed: \_\_\_\_\_  
Applicant

Date: \_\_\_\_\_

Signed: \_\_\_\_\_  
Departmental Team Lead,  
KGHPS Working Group

Date: \_\_\_\_\_

SUBMIT THIS FORM TO: [KGHPhysiciansSociety@gmail.com](mailto:KGHPhysiciansSociety@gmail.com)

*For Office Use Only:*

Date Received:
