

## 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 project application proposal for funding consideration **including Departmental/Divisional physician recruitment** ([click or tap here to view additional information in the FAQs](#)). In order that the Director, Facility Engagement can conduct an initial review of the proposal and identify any issues or concerns requiring clarification, the application **must be received by the last day of each month**. The application will then be sent to the KGHPS Working Group for review and comments. Please see FAQs noted above or contact [Admin@KelownaPhysiciansSociety.ca](mailto:Admin@KelownaPhysiciansSociety.ca) for additional information.
- ◆ No funding will be provided without first submitting a Facility Project application form to the KGHPS Working Group for review/approval, except in the case of Departmental/Interdepartmental Retreats ([click or tap here](#) for those guidelines).
- ◆ The maximum amount of new Facility Engagement Funding applications cannot be more than \$10,000.
- ◆ 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 click [here](#) for the online form or downloadable Word document). Completed forms are to be submitted to the Director, Facility Engagement by emailing [Admin@KelownaPhysiciansSociety.ca](mailto:Admin@KelownaPhysiciansSociety.ca). On-line forms will be automatically forwarded.
- ◆ The FE Project Lead will have the opportunity to revise their original application based on feedback received. The revised FE application will be recirculated to the Working Group members to evaluate using the on-line evaluation survey tool via Survey Monkey.
- ◆ For FE applications that require additional funds exceeding the originally approved amount, the Working Group encourages the Project Lead to attend a meeting to speak further to the application and answer questions. The Project Lead may also ask to attend if they wish to outline additional information.

- ◆ The FE applications with their collective scores and any commentary from presentations will be reviewed at the next scheduled Working Group meeting (usually the second Thursday of each month, with the exception of July and August). 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 applications.
- ◆ The Director, Facility Engagement notifies the FE Project Lead of the KGHPs decision to fund (or not) their initiative. The KGH Executive Director, Chief of Staff and Site Medical Director are included in the notification.
- ◆ The approved FE project or initiative is set up in the Facility Engagement Management System (FEMS) 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.
- ◆ 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.

**Please note:** In order to be reimbursed for expenses and sessional time, itemized receipts and sessional claims must be submitted through FEMS within 90 days of the expense or work occurring. Claims submitted after the 90-day period will be rejected by FEMS. However, except under exceptional circumstances, an explanation is to be provided by the Project Lead and must be approved by the executive of the KGH Physicians Society for claim(s) to be paid. Sessional claims should be entered into FEMS as the work progresses with an explanation of work done rather than one large claim at the end of the project. As well, the 'Description' field must be completed when claiming sessionals or expenses. **In addition to the credit card receipt(s), include the itemized receipt(s) and note the names of all attendees.**

## FUNDING RESTRICTIONS:

Facility Engagement funding cannot be used for the following (as per [SSC Funding Guidelines](#)):

- ◆ Advertising with the exception of physician recruitment ads. See Recruitment Guidelines noted in the [FAQs](#).
- ◆ Compensation for clinical services, including physician scheduling. Due to the Hunter Arbitration award (2005), that considers the scheduling of physicians within a facility to be a form of clinical service, compensation for scheduling or tools that facilitate the scheduling of physicians within a facility is not a permitted use of FE funding.
- ◆ Purchase of clinical equipment.
- ◆ Donations to charities or political parties.
- ◆ Meeting attendance that is presently required as part of maintaining privileges or part of one's day-to-day role i.e., department head.
- ◆ Physician research and quality projects. Includes research projects aimed at generating new knowledge, testing new practice, theory or intervention or conducting control studies.
- ◆ CME/CPD Training - physician sessionals and expenses for attending accredited or non-accredited clinical training. **Please contact the KGH Physicians Society at [Admin@KelownaPhysiciansSociety.ca](mailto:Admin@KelownaPhysiciansSociety.ca) for further clarification.**
- ◆ Time spent on physician orientation within the hospital.

- ◆ Time to attend events where the primary intent is to socialize. This includes 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).
- ◆ Sessionals for retroactive project work except for up to three (3) hours for time spent by the Project Lead on preparing the application.

# KGHPS FACILITY ENGAGEMENT FUNDING APPLICATION

*(To be received by the KGH Physicians Society no later than the last day of each month)*

## 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):**

*\*\* Projects are funded on a fiscal year basis (April 1 to March 31). At the end of the fiscal year, physician leads will be notified as to next steps/budget remaining if the project is anticipated to be carried over to the next fiscal year.*

## 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

*Sessional fees are \$160.23 per hour. Maximum meal expenses for dinner meetings: \$40.00 per person (including gratuities, taxes, and service fees – alcohol cannot be funded). Funding cannot be provided for retroactive projects except for up to 3 hours for Project Lead for working on application. **Note:** The Director, Facility Engagement can assist you in developing the Project Budget within the guidelines. **(Please note: Sessional fees and expense claims must be submitted in FEMS within 90 days of the meeting or activity taking place; otherwise, they will not be funded. Please be sure to complete the 'Description' field in FEMS and enter sessional time as it occurs rather than one lump sum.)***

### Implementation Expenses:

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

### Post-Implementation Operational Expenses:

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

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

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

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

SUBMIT THIS FORM TO: [Admin@KelownaPhysiciansSociety.ca](mailto:Admin@KelownaPhysiciansSociety.ca)

<i>For Office Use Only:</i>	
Date Received:	