



Report

Review of Travel Equity Fund (TEF) Policy

Governance Committee 2024-2025

Canadian Federation of Medical Students

Prepared By:

Akhil Ramdoyal, Jesse Lafontaine, Brenda Lin

Governance Committee, Travel Equity Fund Policy Review

governance@cfms.org

umramdoa@myumanitoba.ca, jlafonta@ualberta.ca, blin2028@meds.uwo.ca

Justin Phung

Ontario Regional Director CFMS, Governance Committee Co-Lead

ontario@cfms.org

justin.phung@uottawa.ca

Table of Contents

BACKGROUND	3
Governance Committee: Travel Equity Fund (TEF) Policy Review Committee	3
Task Force Objective	3
TEF USAGE DATA	4
CFMS STAFF AND BOARD FEEDBACK	5
MEDICAL STUDENT SOCIETY FEEDBACK	5
CFMS-MD TEF SURVEY RESULTS	6
EXTERNAL ORGANIZATION RESEARCH	8
GOVERNANCE COMMITTEE RECOMMENDATIONS	9
Increase Reimbursement Coverage and Amount Awarded	9
Increase Communication and Transparency	9
Equity Considerations	10
APPENDIX I: Timeline and Work Plan	11
APPENDIX II: CFMS-MD Google Form Survey Results (2025)	11

BACKGROUND

The Travel Equity Fund (TEF) was established by the Canadian Federation of Medical Students (CFMS) to reduce financial barriers for students attending key CFMS events (Annual General Meeting, National Day of Action, Canadian Medical Student Conference, and Medical Education Day of Action) by reimbursing eligible travel expenses — specifically, airplane and train travel from the home city to the event city. The fund, allocated at approximately \$20,000 per calendar year, is intended to integrate equity into CFMS participation while ensuring prudent stewardship of CFMS resources.

This report summarizes our review of TEF usage, funding sufficiency, and administration with the goal of identifying actionable improvements for future policy iterations. The timeline and work plan are seen in Appendix I, and the survey results are in Appendix II.

Governance Committee: Travel Equity Fund (TEF) Policy Review Committee

The TEF Policy Review Committee was established by the CFMS Governance Committee to provide an in-depth evaluation of the current Travel Equity Fund policy. This policy involves consultation with CFMS leadership, MedSoc representatives, and CFMS staff involved in the administration of TEF. Its membership reflects a multi-stakeholder approach that ensures the review encompasses perspectives from those directly affected by the TEF's processes.

Task Force Objective

The primary objective of the task force is to conduct a comprehensive review of the TEF policy and its implementation. Specifically, the task force aims to:

- Evaluate TEF usage data and assess whether the current funding levels adequately support student participation at key CFMS events.
- Determine which student groups are utilizing the fund — identifying trends such as high engagement among MedSoc members and CFMS leadership — and to explore whether the current outreach is inclusive of the broader student body.
- Examine operational challenges including reimbursement timelines, algorithm accuracy, and communication gaps.
- Investigate external travel funding models to identify best practices that might inform improvements to the CFMS TEF.
- Develop a set of actionable recommendations for the CFMS Board aimed at enhancing transparency, equity, and efficiency within the TEF framework.

Please see Appendix II for the full committee timeline and work plan.

TEF USAGE DATA

The CFMS allocated \$20,000 per year in funding to TEF, with the breakdown being \$7,500 for the Annual General Meeting (AGM), \$4,500 for National Day of Action (NDoA), and \$8,500 for Canadian Medical Student Conference (CMSC) / Spring General Meeting (SGM). If the allocated funds are not fully spent on each event, the remaining balance is rolled over to the next event. The funding should only be used after other sources of external funding, such as those from Medical Societies (MedSocs), have been exhausted, and it is not meant to replace those funds. As outlined on the CFMS website, a “Cost To Person” will be calculated based on the TEF funding available for the event and the TEF reimbursement requests received. Expenses above this amount will be reimbursed.

In the 2024 calendar year, the allocated funds were nearly fully spent, while in 2023, the funds were not fully used due to a lack of applicants. A cheque for the funding is mailed two weeks after an event, and most TEF recipients are reimbursed within one month. MedSoc representatives can also apply for funding, but they must declare the amount of funding they receive from their MedSoc, which is factored into the calculations. The number of MedSoc representatives applying has continued to increase each year, with most applications supporting AGM attendance, which is considered important. See Figure 1 below for TEF usage data:

Jan 1st - Dec 31, 2024						Reimbursement Requests Received		
	TEF funding	Budgeted	Spent	Cost To Person	Opt-in	Total	MedSoc	Reimbursed
NDoA	MDFM	\$4,000.00	\$4,151.26	\$194.43	45	45		40
AGM	MDFM	\$7,500.00	\$7,500.05	\$105.00	24	21	19	21
CMSC incl. SGM/MEDOA	MDFM	\$8,500.00	\$8,348.69	\$220.00	38	33	16	31
Jan 1st - Dec 31, 2023						Reimbursement Requests Received		
	TEF funding	Budgeted	Spent	Cost To Person	Opt-in	Total	MedSoc	Reimbursed
NDoA	MDFM	\$11,244.30	\$8,763.45	\$0.00	27	17	8	16
AGM	MDFM	\$7,109.71	\$2,975.11	\$0.00	13	6	4	6
MEDoA	CFMS	\$4,000.00	\$3,999.98	\$216.55	20	14	1	12
SGM	MDFM	\$5,500.00	\$5,780.59	\$270.00	33	22	4	19
Cost To Person = amount not refunded, refund threshold due to funds available (budget). Reimbursement requests exceed the funding available.								
Remarks:								
Difference between Opt-in and those who actually send in their reimbursement request seems to depend on MedSoc/other funding as well as students unable to attend.								

Figure 1: TEF usage data from 2023 and 2024 including data on budgeted amounts, amount spent, and the cost to person for that year's event

CFMS STAFF AND BOARD FEEDBACK

There is concern among TEF applicants that there is no guarantee of reimbursement, as it depends on several factors, such as the number of other applicants and the variable cost-to-person threshold. While the CFMS is transparent about this challenge, it is not an ideal situation. There is a desire to see continued focus on transparency and the disclosure of factors that influence reimbursement amounts. However, it is difficult to set a fixed reimbursement amount, as it varies depending on the number of applicants for each event.

The original intention of TEF was to support self-funded members, especially for CMSC, as it is primarily attended by MedSoc representatives. However, more MedSoc reps have been receiving this funding over time. CMSC is the largest event, but it is largely paid for by MedSocs, while NDoA is more focused on general members and typically not eligible for MedSoc funding. Given this, it may be worth considering allocating more funding to NDoA.

Geographic representation poses a challenge due to the large disparities in travel costs depending on the event location. One potential solution could be to set a budget per region or per school to account for these disparities. Additionally, the TEF does not currently account for the full cost of attendance, such as the expense of travelling from a rural site to the airport, which can be particularly costly for schools like the Northern Ontario School of Medicine (NOSM) in Sudbury or Thunder Bay. Expanding the included costs to cover these expenses might be worth considering.

The uncertainty surrounding the amount of reimbursement has a more significant impact on schools and locations where it is more expensive to fly from. One of the goals of TEF is to reduce the barriers for regions with higher travel costs. Currently, the TEF looks at equity solely through a travel cost lens and focuses on geographic equity. It does not consider other factors like equity-deserving groups, racial background, or socioeconomic status. The current approach is to have alumni or other groups sponsor attendance for specific Equity, Diversity, Inclusion, and Decolonization (EDID) groups.

MEDICAL STUDENT SOCIETY FEEDBACK

MedSoc feedback was collected at the Representatives Roundtable discussions in Moncton, New Brunswick on September 21, 2024.

Funding sources for CFMS event attendance vary by school and include MedSoc, Undergraduate Medical Education (UGME) offices, faculty, provincial medical associations, and TEF. Several schools stretch their budgets to maximize student attendance, with some institutions fully funding executive members, while others split costs or rely on student contributions. General members, however, often receive little to no funding for conferences.

Many institutions require early planning to reduce costs, but this can be challenging due to the uncertainty surrounding TEF funding. Additionally, obtaining absence approval can be difficult.

Pre-clerkship absence policies range from no limits to 5-14 days per year, while clerkship absence policies generally allow students to miss 10-25% of a rotation, often requiring pre-approval. Some schools allow personal or academic leave days, while others have strict requirements for justification.

Faculty at certain institutions are hesitant to support student leadership conferences, often prioritizing research-based events instead. In some cases, schools provide no formal support or policy for leadership-related absences. MedSocs are actively advocating for recognition and sustainable funding for leadership conferences to address these challenges.

CFMS-MD TEF SURVEY RESULTS

The CFMS-MD TEF Survey was distributed in the CFMS newsletter on February 5, 2025, as well as promoted to VP Externals at the Representatives Roundtable occurring virtually on February 16, 2025. The link was also emailed to past applicants who applied for TEF in 2023 and 2024. The overall aim of the survey was to gather people's anonymous thoughts and feedback regarding the TEF. See Appendix 3 for detailed breakdown of survey question and responses.

Overall, 13 survey respondents from member school with representation from the University of British Columbia (n = 1), University of Alberta (n = 2), University of Calgary (n = 1), University of Saskatchewan (n = 1), University of Manitoba (n = 1), McMaster (n = 1), McGill (n = 2), Dalhousie (n = 2), and Memorial University of Newfoundland (n = 1). This means that NOSM, Western University, University of Toronto, Queen's University, University of Ottawa, and Centre de formation médicale du Nouveau-Brunswick were not represented. We acknowledge that there may be an element of bias when it comes to these survey responses

Importance of TEF and Impact to Respondents:

All respondents indicated that the TEF is at least somewhat important, with 92.3% believing it plays a key role in ensuring equitable access to CFMS events. Additionally, 84.6% felt that TEF has helped reduce financial barriers to attending these events. While 61.6% of respondents believe that TEF is at least somewhat equitable in its current form, 76.9% expressed being at least somewhat satisfied with the program.

Funding and Awareness:

All respondents received TEF, except for one individual who faced reimbursement issues. The majority (63.7%) received between \$100 and \$300 in funding, with 18.2% receiving over \$400, and another 18.2% receiving \$50 or less. Over half (53%) first learned about TEF through the CFMS website. However, the survey revealed that 69.2% of respondents are either part of a MedSoc or hold a CFMS Chair/National Officer/Committee role, indicating a high level of engagement among these groups. This could be attributed to the channels used to distribute the survey or a genuine increase in awareness of TEF among these groups.

Travel Details:

Early clerkship students (Year 3) made up the largest group of respondents (53.9%), indicating that TEF is particularly relevant for students in this phase who are likely to travel more. Flights were the preferred mode of transport for 84.6% of respondents, which is significant given that travel costs represent a major expense for many. A significant number (69.1%) found that advertising (at least two months in advance) effectively reached them. However, some respondents noted that clerkship approvals can be unpredictable, and that the current TEF policy for flight reimbursements may not be ideal for all situations.

TEF Application Process:

Most respondents (77%) found the TEF application process to be clear, with 77% also reporting that the reimbursement guidelines were easy to understand, either completely or somewhat.

Expectations and Adequate Funding:

Nearly half of the respondents (46.2%) reported that the funding they received did not meet their expectations. There was a division in opinion on whether the current funding adequately covers travel-related expenses, with 46.2% feeling it somewhat meets their needs, and another 46.2% feeling it does not fully cover costs. One respondent's experience, where they only received \$20 for a flight from Edmonton, highlighted potential discrepancies between actual travel costs and reimbursement amounts.

Reimbursement Process:

Concerns were raised about the delayed reimbursements, and respondents expressed a need for greater clarity and transparency regarding how the reimbursement algorithm works. Many were unsure about the factors considered in the calculation, particularly regarding gas expenses — one participant noted they were reimbursed twice the actual amount for gas. There is a need for clear communication on what expenses are covered, how the algorithm functions, and what factors influence reimbursements. Additionally, setting appropriate expectations, including guidance on eligibility and consequences, is currently lacking.

Policy and Deadline Issues:

Some respondents felt that the current reimbursement deadline might be too early for them, which impacts their ability to submit timely claims. Although 46% of respondents believe the TEF policy accounts for geographic cost differences, only 7.7% outright disagreed, with many remaining neutral. This suggests there is room for improvement in adjusting the funding model to better account for regional differences in costs.

Administrative and Procedural Concerns:

Respondents reported difficulties in confirming leave approval (especially for clerkship students) before booking tickets. This is critical given the requirement to purchase tickets at least five weeks in advance. Moreover, several medical schools (e.g., NOSM, Western, University of Toronto, Queens, University of Ottawa, Centre de formation médicale du Nouveau-Brunswick) were not represented in the survey, suggesting potential gaps in TEF's outreach and advertising efforts.

Funding Model:

A majority of respondents (61%) expressed a preference for fewer awards but with more substantial funding, potentially using a lottery model. This preference was particularly strong among students with limited alternative funding, such as those presenting posters. Currently, no equity data is available to inform the funding model.

EXTERNAL ORGANIZATION RESEARCH

As part of a comprehensive search, the Governance Committee sought to investigate external organizations for their sources of funding for their delegates and applicants attending conferences and events.

Many external organizations provide funding to students attending conferences, typically reimbursing for conference registration fees, travel and transportation costs (usually limited to the most economical options such as economy class flights), and accommodations (usually limited to standard, single-person rooms or a set amount). Some organizations also reimburse meals, and grants typically range from \$250 to \$500. Most organizations do not specify how many applicants can receive grants, and the application process varies; some grants are approved on a rolling basis, while others have set deadlines.

The Ontario Medical Students Association (OMSA) offers three application rounds annually, covering up to \$250 in expenses, excluding alcoholic beverages and excessive transportation costs. Mileage is reimbursed at \$0.66 per km, and the maximum food allowance is \$25 per day. For OMSA-hosted events like their Day of Action or Annual General Meeting, the attending students are fully covered, which includes their hotel and travel expenses, although the delegates and attendees are financially backed by the provincial medical association and thus OMSA operates based on budgeting constraints of that association. Meanwhile, the American Medical Association also provides funding for conferences, research, and student initiatives, although they have numerous sponsors that support this travel.

The University of British Columbia offers conference grants up to \$500. This covers conference registration, transportation (economy class travel), and accommodations. Non-eligible expenses include meals, per diems, vaccinations, and other personal activities. The University of Western Ontario conference grant, also up to \$500, requires itemized receipts for all expenses and reimbursement only for the most economical options. The University of Toronto offers a conference grant of up to \$500, with specific allowances for travel (economy class), car rentals (up to \$60 per day), and accommodations (\$120 per night for up to three nights). Food, alcohol, and social expenses are not reimbursed. The University of Saskatchewan provides grants of \$500 for domestic, \$1,000 for international conferences, and \$1,000 for virtual events. Memorial University provides up to \$500, with an emphasis on minimizing costs and booking early-bird rates for conferences. They also provide a per diem for travel days and meals not covered by the conference.

The Canadian Institutes of Health Research (CIHR) and the Canadian Geriatric Society (CGS) offer travel grants for specific events such as the CGS Annual Scientific Meeting. The CIHR grant covers the most economical airfare and provides reimbursement for train, bus, or car travel at a rate of \$0.40 per km. The CGS grant covers up to \$500 for attendance at the Annual Scientific Meeting and includes similar travel reimbursement policies.

These funding sources help students manage the costs of attending conferences, although some expenses are excluded or subject to specific restrictions, ensuring that funds are allocated efficiently. Overall, the CFMS distributes a high level of reimbursement funding for students that allows them to travel to their events year-round.

GOVERNANCE COMMITTEE RECOMMENDATIONS

Based on the feedback and data collected, the Governance Committee proposes the following recommendations:

Increase Reimbursement Coverage and Amount Awarded

1. **Expand Coverage to Reflect Full Costs:** TEF reimbursement coverage should be broadened to more accurately reflect the full costs associated with student attendance. This includes not only travel costs (plane, train, or car) but also hotel accommodations, transportation to and from the airport or other intercity travel expenses, and conference registration fees.
2. **Increase Minimum Reimbursement Amount:** The minimum reimbursement threshold should be increased to a range of \$50 to \$100 per person, depending on the event. This ensures that TEF recipients receive a meaningful financial contribution toward their participation.

Increase Communication and Transparency

3. **Publish Key Data:** TEF transparency should be enhanced by regularly sharing key data on the program's website, including the number of applicants, the total cost per person, how these costs are calculated, and the average reimbursement amount received by applicants over the past few years. Consider introducing a dynamic tool (such as a live algorithm) that updates this information in real time.
4. **Clarify Policies in Documentation:** TEF policy documents should clearly outline eligibility criteria and the consequences for non-adherence (e.g., booking non-economy tickets, which should be denied funding unless in exceptional circumstances). The Administrative Coordinator should have the final discretion on the amounts awarded and should evaluate cases on an individual basis.
5. **Expand Outreach to Underserved Schools:** The CFMS should increase outreach efforts to schools that have historically underutilized TEF. This will ensure that funding is made available to a wider pool of students. In addition, advertising TEF during promotions of all major events (AGM, SGM, NDoA, MeDOA) should be mandatory.

6. **Adjust Reimbursement Deadlines:** To accommodate travel schedules, particularly for students in clerkship, reimbursement deadlines should be adjusted. A clear communication channel should be established to allow clerkship students to confirm their leave approval before purchasing tickets. If a student intends to travel but cannot confirm availability (due to uncertain clerkship rotations or scheduling), they should communicate this in advance, with each case considered individually.

Equity Considerations

7. **Regional Funding Sub-allocation:** A funding sub-allocation model to earmark funding should be considered, based on historical data and regional trends, to ensure equitable access and representation from all regions to TEF. This would account for the location of events and ensure fair regional representation. Any unused funds should be redistributed to other applicants to maximize impact.
8. **Targeted Funding for Specific Events:** Limit the distribution of TEF funding to MedSocs for large general student events, such as NDoA, MeDOA, and SGM. These events should prioritize broader student participation, and funding should be reserved for MedSoc-targeted events like the AGM. This should be done with proper advertising of available TEF funding for all events to encourage widespread use.
9. **Collect Equity Data Confidentially:** Introduce a voluntary, confidential, and anonymous system for collecting demographic data related to equity-deserving groups among TEF recipients. Students should have the option to disclose this information as part of their application to help ensure that funding is distributed equitably.
10. **Pilot a Lottery or Merit-Based System:** To ensure equitable distribution, especially when demand for TEF funding exceeds supply, consider piloting a lottery-based or merit-based award system. This could focus on geography or equity-deserving groups. The goal is to ensure that fewer, but higher, funding amounts are awarded in a way that meaningfully supports those in need.
11. **Address Diluted Funding:** In cases where there is a large number of applicants, leading to reduced funding for everyone, consider applying an equity-based or lottery-based model to ensure that reimbursements remain meaningful for individual applicants.

This review and the recommendations were confirmed by Governance Committee members. Given these were recommendations and no motions were required, this topic was not brought up to the 2024-2025 CFMS Board, instead brought up to the Representatives' Roundtable (RRT) at the annual CFMS SGM in Halifax, confirmed with the CFMS President, and sent to Stephanie, the Administrative Coordinator. A TEF one-pager will be developed for promotional purposes and institutional memory.

It was a privilege to work on this proposal and put it all together. Thank you for reading.

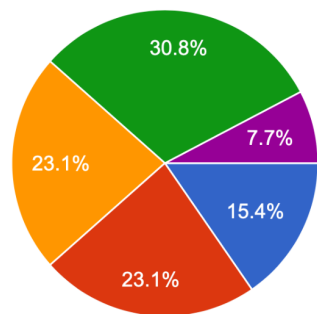
APPENDIX I: Timeline and Work Plan

Description	Date(s)
TEF Committee Meeting: Introduction and Work Distribution	Jan 11, 2025
CFMS Executive and Staff Meeting for TEF Usage Data, Feedback, and Thoughts	Jan 25, 2025
External Organization Research	Feb 1 to Feb 24, 2025
Dissemination of Google Survey form to VPXs, MedSocs, General Students, and past TEF applicants	Feb 1 to Feb 24, 2025
TEF Committee Meeting: Update on Survey Dissemination and Next Steps	Feb 10, 2025
Draft and Compiling Data for TEF Policy Review Draft	Feb 10 to Feb 24, 2025
TEF Committee Meeting: Recommendations Discussion	Feb 24, 2025
Final draft	Feb 28, 2025
Feedback sought from relevant CFMS Internal Stakeholders	March 2025
Presented TEF Recommendations to Representative Roundtable (RRT)	April 3-5, 2025
Development of CFMS Travel Equity Fund (TEF) One-Pager	June 2025

APPENDIX II: CFMS-MD Google Form Survey Results (2025)

What year of medical school are you in?

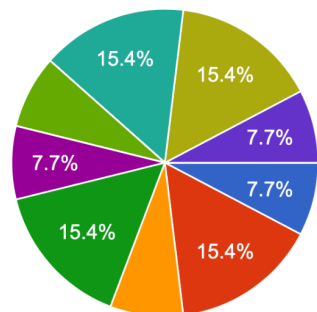
13 responses



- Year 1 (Pre-Clerkship)
- Year 2 (Pre-Clerkship)
- Year 2 (Clerkship)
- Year 3 (Clerkship)
- Year 4 (Clerkship)

Which medical school are you currently attending?

13 responses

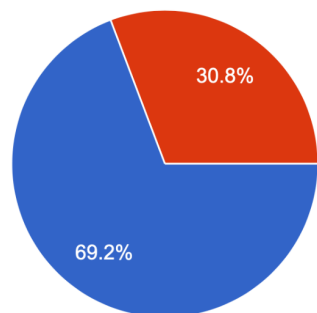


- University of British Columbia
- University of Alberta
- University of Calgary
- University of Saskatchewan
- University of Manitoba
- Northern Ontario School of Medicine
- Western University
- McMaster University

1/2

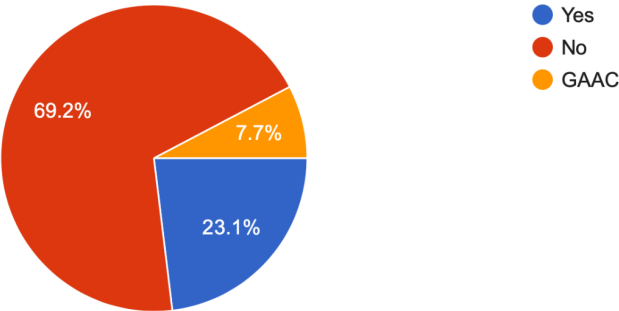
Are you a member of a Medical Society (MedSoc)?

13 responses

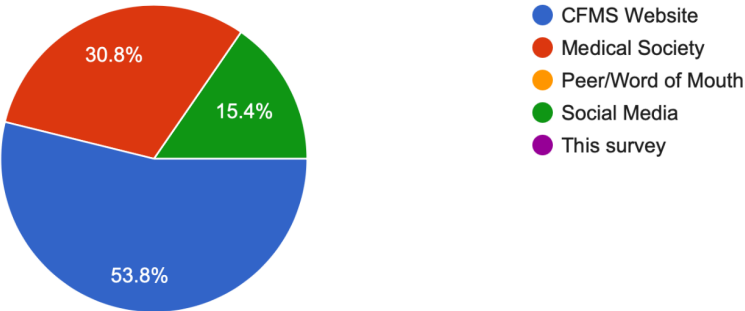


- Yes
- No

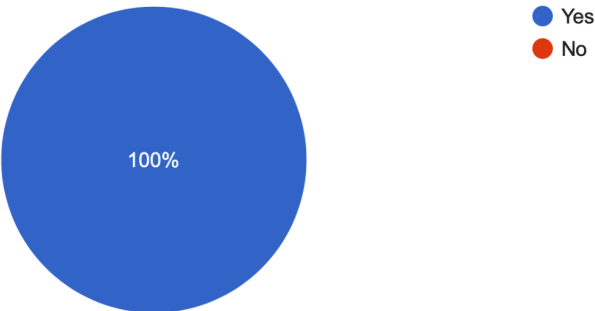
Are you a CFMS Chair, National Officer, or Committee Member?
13 responses



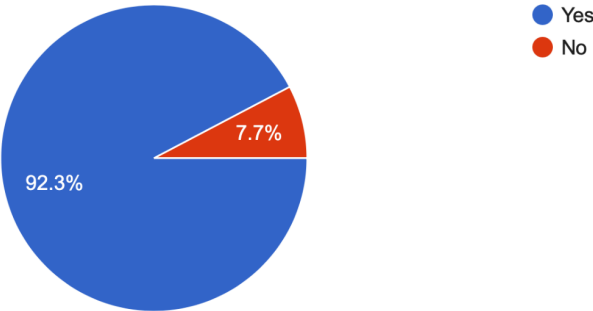
How did you first hear about the TEF? If 'other', please specify.
13 responses



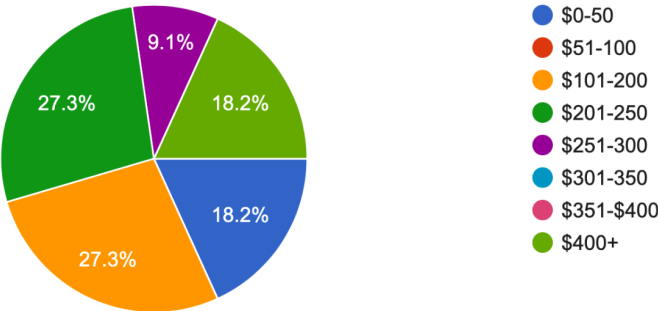
Have you applied for or opted into the Travel Equity Fund in the past?
13 responses



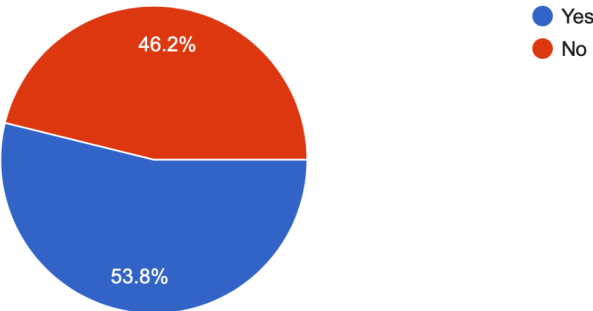
Did you receive reimbursement through the TEF?
13 responses



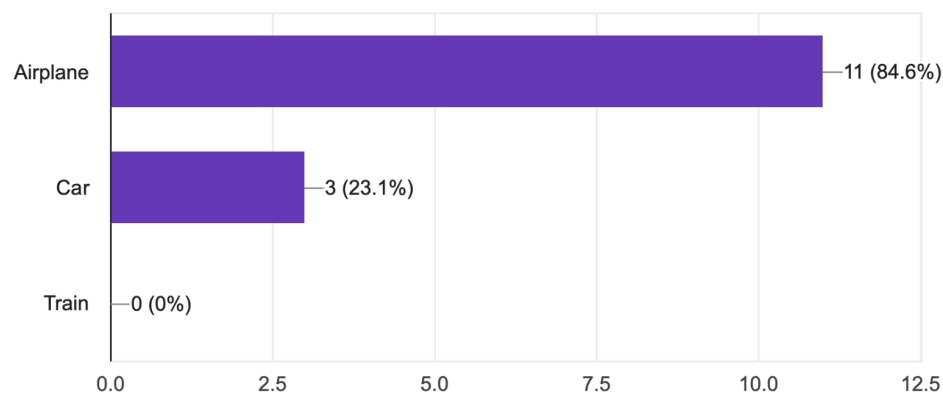
If you answered yes above, how much reimbursement did you receive for the events you attended?
11 responses



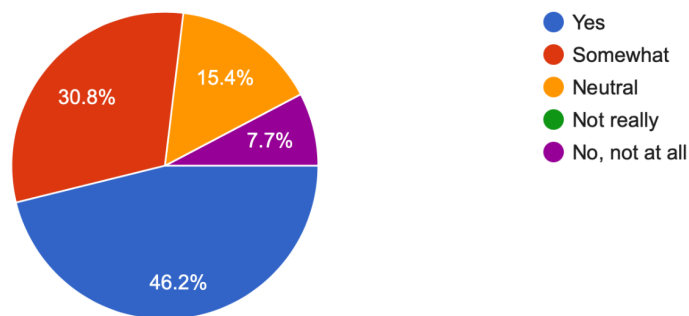
Did the TEF reimbursement amount meet your expectations based on your travel expenses?
13 responses



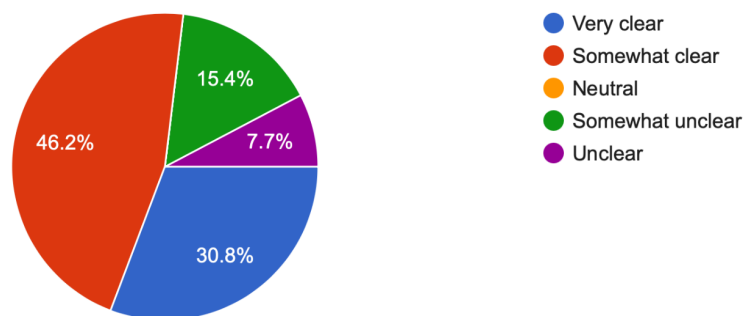
What is your primary mode of travel when attending CFMS events? If 'other', please specify.
13 responses



Do you feel the TEF policy accounts for the varying costs of travel based on geographic location?
13 responses

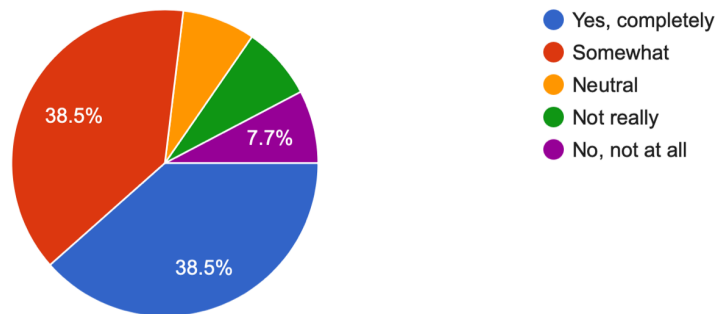


How clear did you find the process of opting into the TEF during event registration?
13 responses



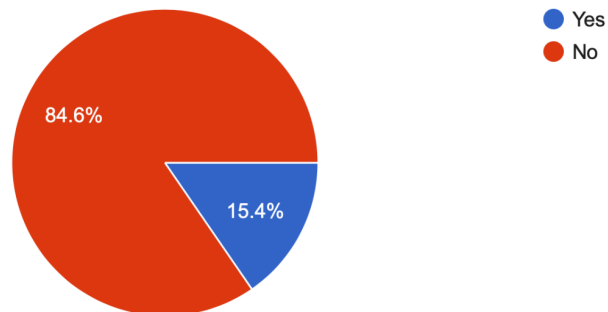
Were the reimbursement guidelines (e.g., cost thresholds, eligible expenses) easy to understand?

13 responses



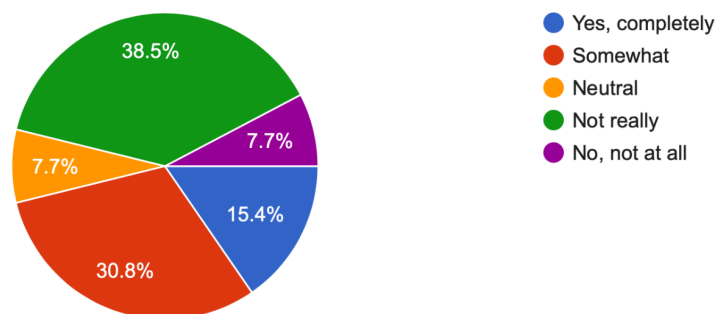
Did you encounter any challenges when submitting your reimbursement request?

13 responses



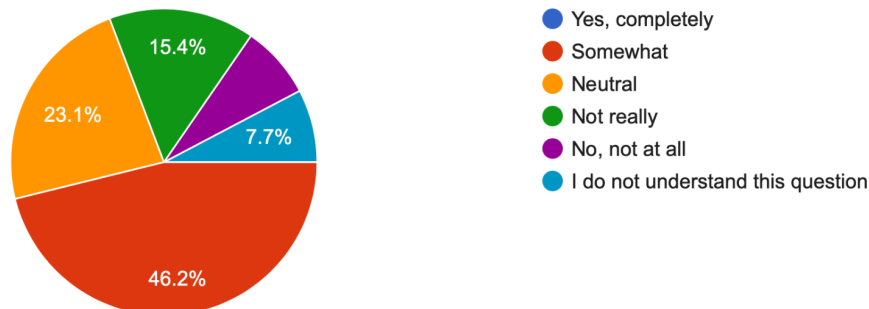
Does the current funding amount provided by the TEF meet your financial needs for travel-related expenses in the future?

13 responses



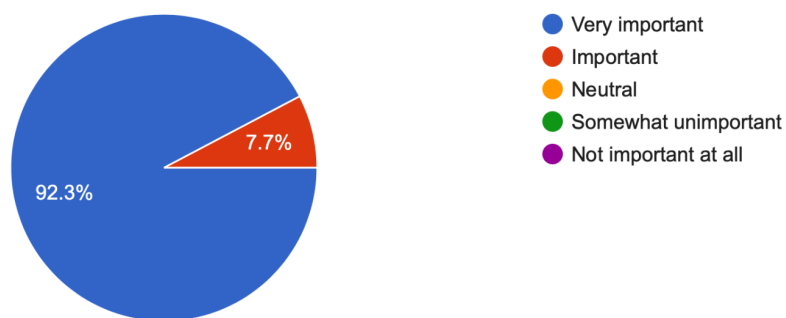
Do you find the current TEF policy accessible for medical students, particularly for events like the AGM in September when they have not started their respective medical schools?

13 responses



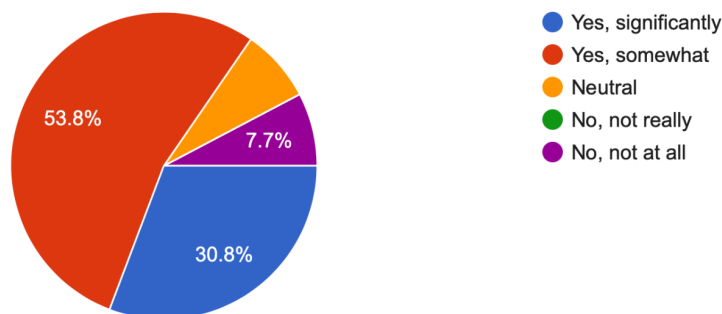
How important is the Travel Equity Fund for ensuring equitable access to CFMS events?

13 responses



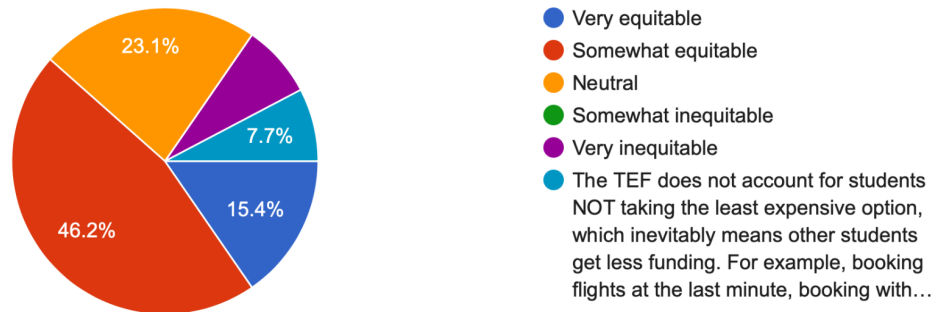
Do you feel the TEF has reduced financial barriers to attending CFMS events?

13 responses



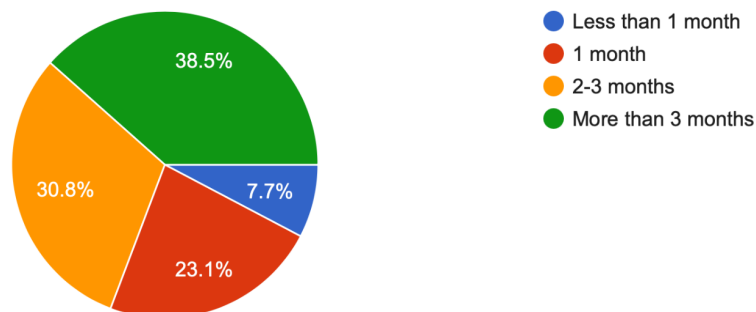
How equitable do you think the TEF is in its current form?

13 responses



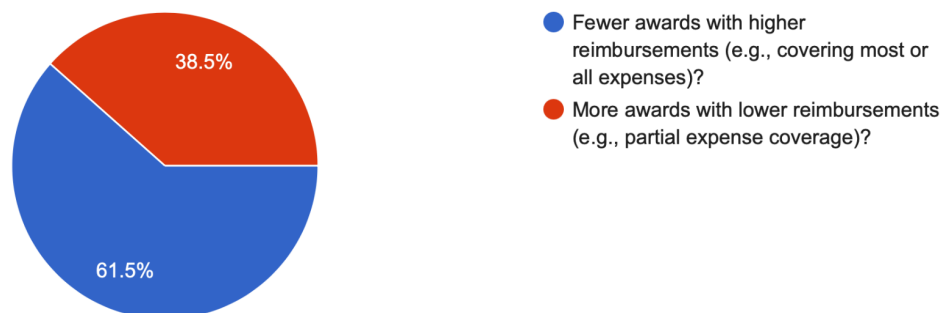
How far in advance should TEF-related funding opportunities be advertised to students?

13 responses

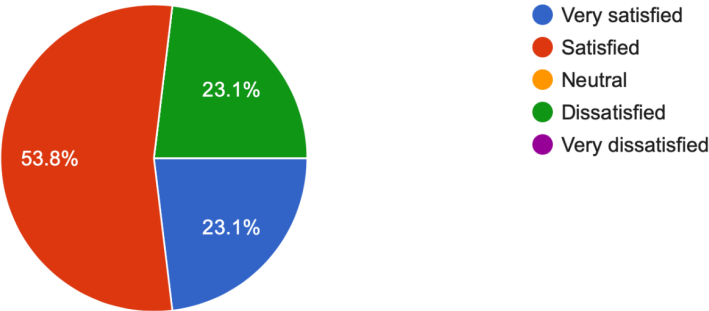


Would you prefer:

13 responses



Overall, how satisfied are you with the Travel Equity Fund process?
13 responses



- - END OF REPORT - -