

# CFMS Student Initiative Grants Program

*Supporting Medical Student Initiatives*



## Student Initiative Grants Program Guidelines

### 1. Eligibility

1.1. In order for initiatives to be eligible to receive a Canadian Federation of Medical Students (CFMS) Student Initiative Grant (SIG), the initiative must fulfill the following criteria:

- i. A CFMS SIG must never have been received in the past for the same initiative.
- ii. The applicants must be medical students who are current members of the CFMS. The CFMS does encourage collaboration and partnership with other stakeholder bodies as necessary for project success; however, submissions must come from the involved CFMS member student(s).
- iii. The applicants must not be requesting funding for ineligible expenses as per section 1.2.
- iv. The initiative must not have significant potential to result in harm to an individual or group.
- v. The initiative expenses must not have been incurred prior to the academic year of the application year. Initiatives undertaken during the academic year of the application year are eligible for retroactive funding if proof of expenses can be provided. An 'academic year' is defined as the term from August 1 to July 31. For example, for SIG applications received in the 2018-2019 application year, the initiative expenses must not have been incurred prior to August 1, 2018.

1.2. CFMS SIGs will not fund the following expenses:

- i. Individual academic research.
- ii. Conference funding (either travel or conference fees) for individual students.
- iii. Alcohol, tobacco, or other substances.
- iv. Those related to an event or initiative which involves gambling.
- v. Compensation to medical students or other initiative-involved students for their time working on an initiative.
  - a. Exception: In the case where a student *not* affiliated with the initiative is hired to provide a service which the initiative organizers would otherwise have been required to pay a significant amount to an external company for (e.g. hiring a company for app development), the SIG coordinator may approve a reasonable honorarium payment, if the following can be provided:
    - i. Evidence of three quotes from external service providers for the same service.

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- ii. A formal receipt/invoice of services rendered, including all specifics of the service provided, along with particulars for the number of hours spent.
  - b. Exceptions will be made at the discretion of the SIG coordinator, in conjunction with the CFMS VP Finance.
- 1.3. Initiatives which are provided with SIG funding should be inclusive and run at all times in a way that does not jeopardize the professionalism of those involved or of the medical profession.
  - i. If at any time a concern arises regarding the appropriateness or professionalism of activities associated with an initiative, the SIG coordinator should be contacted.
  - ii. Provision of CFMS sponsorship for an overall initiative via SIG funding does not denote CFMS endorsement of all initiative or event activities.
  - iii. Any perceived jeopardization of the professionalism of those involved or of the medical profession may result in the disqualification of an application for CFMS SIG funding or in a lapse of funding eligibility for CFMS SIG winners.
    - a. In the event of the disqualification of an application or in a lapse of funding eligibility for CFMS SIG winners due to professionalism concerns, an appeal of the decision will be considered by a panel consisting of a CFMS SIG Program Coordinator, the CFMS President, the CFMS VP Finance, a representative from the CFMS Presidents Roundtable, and a representative from the CFMS Representatives Roundtable. Their majority decision (3 of 5 votes) shall be binding.
- 1.4. There is two categories of funding available. Tier 1 SIG funding is available for medium to large-scale initiatives and Tier 2 SIG funding is available for small- to medium-scale initiatives. The maximum amount of funding that may be requested via a CFMS SIG is \$3000.00 for Tier 1 and \$1500.00 for Tier 2.
  - i. If an initiative's overall budget is over \$3000.00, it is requested that the full budget be provided, that the amount requested from CFMS be specified, and that applicants seek additional funding from other sources for the remainder of the required funds.
  - ii. It is expected that CFMS have the opportunity to be recognized in the same way as any other sponsor who contributes an equivalent financial amount to the initiative or event receiving SIG funding.
  - iii. It is expected that the entirety of any funds awarded will be reimbursed by June 30<sup>th</sup> of the following year. Any remaining funding on this date will be forfeited back to the CFMS SIGs Program.

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### **2. Adjudication and Result Notification Process**

2.1. All applications will be due on a single deadline for each academic year. Due to the fact that funds are distributed annually based on the ranked scores of initiative applications following adjudication, the single deadline ensures that the potential for funding is not affected by an imbalance in the number of applications received at one time of the year versus another.

2.2. All CFMS SIG applications will be evaluated based on a standard rubric which assesses the following components of the proposed initiative, which are weighted as noted.

- i. Enhancement of the experience of Canadian medical students with respect to their education, wellbeing, or otherwise. (30%)
- ii. Enhancement of the applicants' local, provincial, or national community. (15%)
- iii. Sustainability and/or long-term impact of initiative following anticipated depletion of SIGs Program grant funding. (30%)
- iv. Practicality and level of planning evident in the initiative proposal. (15%)
- v. Clarity, specificity, and transparency of itemized budget. (10%)

2.3. The evaluation of all applications, as well as final funding decisions, will occur within eight (8) weeks from the application deadline.

2.4. All applicants will be notified via email as to the status of their application's success by the end of the period outlined in section 2.3. This includes those who submitted both successful and unsuccessful applications. To reduce administrative burden, this email may be a generic email sent to multiple applicants.

- i. All applicants whose initiative was partially or fully funded shall receive both an email notification and an electronic confirmation letter of the amount of funding granted.
- ii. Any applicant who submitted an unsuccessful or partially funded application may request feedback on their application in order to understand the decision better and to inform what they may improve on for future applications.
- iii. If an applicant requests feedback, this request will be met by the current SIG coordinator within three (3) weeks of receipt of the feedback request.

2.5. The adjudication process for SIG applications is as follows:

- i. Following the application deadline, all SIG applications will be numbered in the order that they were received and will be systematically divided into their respective tiers of funding. Within each tier of funding, SIG applications will be systematically divided into a

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- minimum of two adjudication groups of equal size. The maximum number of groups is at the discretion of the SIG coordinator, based on the number of received applications and the number of available reviewers. These reviewers may be drawn from the CFMS Nominations Committee or any other body at the discretion of the SIG coordinator.
- ii. In Round 1 of evaluations, all applications within an adjudication group will be scored by a minimum of two (2) evaluators. The exact number of evaluators assessing a single adjudication group is at the discretion of the SIG coordinator based on the number of available reviewers. These scores may be normalized and/or standardized to reduce the influence of any single individual evaluator's score.
  - iii. Following Round 1 of evaluations, all scores will be returned to the SIG coordinator or designate, who will determine the score that the top third (1/3) of applications in each group fall above. All applications receiving a score at or above this cut-off score will move to Round 2 of evaluations. Applications receiving scores below this cut-off score will not be evaluated further. If a tier receives less than ten (10) applications, all applications will automatically move to Round 2 of evaluations.
  - iv. In Round 2 of evaluations, all applications that have moved on from Round 1 will be assessed by all of the evaluators. For the group of applications that an evaluator has already assessed in Round 1, they will have the option of leaving the scores as-is or of re-evaluating the group of applications along with all of the others. These scores may be normalized and/or standardized to reduce the influence of any single individual evaluator's score.
  - v. During Round 2 of evaluations, evaluators will also be asked to answer each of the following questions for the applications that they are reviewing:
    - a. Are you in favour of funding this initiative if possible? If no, please comment as to why not.
    - b. If you are in favour of funding this initiative, do you feel that it should receive full or partial funding? If partial funding only, please comment as to why, and if there is a specific line item that you feel CFMS should or should not fund, indicate this.
    - c. Any other funding-relevant comments?
  - vi. Following Round 2 of evaluations, all scores will again be returned to the SIG coordinator or designate, who will average the scores received from all evaluators and create a rank-ordered list of applications, based on the overall scores that they achieved. Projects that evaluators unanimously thought should not be funded will be removed from the list (given that the rationale is unbiased). A conversation (electronic or verbal) will be had in the case of projects for which there was disagreement on the status of the funding decision, with the aim that consensus be reached.

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- vii. Once all decisions have been finalized, the SIG coordinator will proceed down the ranked list of funding applications and will distribute money to both tiers of funding in order of their final score, until the funding available for the year is depleted.
- viii. As of the 2018-2019 academic year, a maximum of \$20 000.00 is available for Tier 1 funding and a maximum of \$5 000.00 is available for Tier 2 funding.

2.6. The adjudication committee may decide to fund the full amount requested by an initiative application, or they may decide to provide partial funding. In the case that partial funding is provided, the applicants will be notified of this, as well as any funding restrictions, in their funding confirmation letter.

- i. If only partial funding is provided and the confirmation letter does not place any restrictions on which portion of the budget these funds may be used for, the funds may then be used for any part of the budget for which funding was requested from the SIG, at the discretion of the applicants.
- ii. If only partial funding is provided, the confirmation letter may indicate which portions of the proposed budget that the SIG is able to provide funding for. In this case, reimbursement will not be provided for any part of the provided budget other than that specified in the letter.

### **3. Distribution of Awarded Funds**

3.1. Once applicants have been notified of the success of their initiative in receiving funding, they may proceed with submitting reimbursement requests. All reimbursement requests must include the following:

- i. A completed CFMS SIG Reimbursement Form, both via hard copy and email.
- ii. Original receipts for all expenses, both via mailed original hard copies and via email (scan or photo).

3.2. Reimbursement requests are to be mailed in original hard copy format to the CFMS head office and emailed to the CFMS SIG coordinator ([sigs@cfms.org](mailto:sigs@cfms.org)) and copied (i.e. cc'd) to the CFMS Vice-President of Finance ([finance@cfms.org](mailto:finance@cfms.org)), the CFMS General Manager ([office@cfms.org](mailto:office@cfms.org)), and the CFMS's accountant ([wjr@wjradsburn.com](mailto:wjr@wjradsburn.com)).

3.3. It is the responsibility of the SIG coordinator to check that submitted expenses are eligible and align with what funds were requested for in the original SIG application.

- i. If there is a discrepancy between items that reimbursements are being requested for and what was described in the original approved application, funds may be held until it is determined whether the alternate expense is eligible or not.

3.4. If an applicant wishes to modify their budget after they have been notified that their application is successful, they must request formal approval from the SIG coordinator.

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- i. Budget changes may be approved at the discretion of the SIG coordinator and CFMS Vice-President of Finance, at which point reimbursement will follow the normal procedure as per sections 3.1-3.3.
  - ii. If an expense was not part of the initial approved application and has not been approved by the SIG coordinator, no reimbursement for this item shall be given.
  - iii. Due to the constraints of the SIG budget and emphasis on distributing all potential funds by the completion of the application cycle, no additional funds beyond those initially granted will be given. This means that changes to what granted funds are used for may be approved, but the amount of funding provided to an initiative will not be increased.
- 3.5. Reimbursement requests should ideally be submitted within 30 days of the expense being incurred. Where this is not possible, it is requested that the applicants contact the SIG coordinator to arrange an agreed upon date for submission. If this does not occur, it is possible that the reimbursement will not be processed.
- 3.6. All reimbursements for an initiative must occur by June 30<sup>th</sup> of the calendar year following the grant cycle. For example, all reimbursements for an award from the 2018-2019 grant cycle must be completed by June 30<sup>th</sup>, 2020. Any funds designated for an initiative but unused by this date shall be forfeited back to the CFMS SIGs Program. No exceptions will be made to this date.
- 3.7. If it is found following grant notification that a successful application was ineligible based on the criteria laid out in any section of these Guidelines, funds will not be disbursed. It is the responsibility of the applicants to ensure that they are eligible prior to submitting the initiative application.

## **4. Post-Funding Requirements**

- 4.1. Once successful SIG applicants are notified that their project will be receiving a SIG, they are required to submit the following documents within 10 business days:
- i. A fully completed SIG Project Registration Form.
  - ii. A short description of the initiative, intended to be used at the SIG coordinator's discretion for reporting, website, or other purposes.
- 4.2. SIG-funded initiatives are required to submit both progress reports and a final report.
- i. Progress reports will be due every three months until the initiative is completed, or for ongoing initiatives, until all funding has been disbursed. The progress report deadlines will be communicated by the SIG coordinator.

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- ii. When the initiative is completed, or for ongoing initiatives, when all funding is disbursed, a final report must be completed and submitted. Regardless of the initiative or funding status, a final project report must be completed if it has not already been done.
- iii. If the above requirements are not met, the SIG coordinator may choose to not approve reimbursement until the outstanding reports have been received. Failure to complete multiple progress reports in a row may result in a lapse of funding eligibility.

## **5. Regional Event Funding**

5.1. The CFMS SIG program will provide a pre-determined amount of funding each year to an event in each geographic region for which CFMS has a regional director (i.e. Atlantic Region, Ontario Region, Quebec Region, Western Region).

- i. As of the 2018-2019 academic year, the set amount of funding that each region is eligible to receive is \$500.00. In order to have a meaningful impact, this funding is designed to be allotted to a single event and not divided between multiple events within a region.
- ii. The regional event funded by the SIG program must be one which unites the CFMS membership of that region and is typically an event which occurs over multiple days.
- iii. Based on the aims of SIG regional event funding, it is preferred that funding goes to a regional event which reaches the broadest regional membership possible versus one which reaches fewer students (e.g. Western Region funding currently goes to Ice Bowl instead of the Alberta Medical Students' Conference and Retreat (AMSCAR), as Ice Bowl has delegates from every Western Region school as opposed to AMSCAR, which involves only Alberta schools).

5.2. The decision surrounding which regional event to fund each year should be confirmed by regional directors for the given region, in conjunction with the SIG coordinator.

- i. The regional events which have been receiving funding for the past few years can reasonably expect to continue receiving this funding in future years, unless they are given significant notice by the regional director and SIG coordinator that this funding will not be available. This notice must be accompanied by an appropriate and non-biased rationale.
- ii. As of the 2018-2019 academic year, the events which currently have arrangements to receive SIG Regional Event Funding are as follows:
  - a. Atlantic Region: Conference of Atlantic Medical Students (CoAMS)
  - b. Ontario Region: Ontario Medical Student Weekend (OMSW)
  - c. Quebec Region: Med Games
  - d. Western Region: Ice Bowl

5.3. SIG Regional Event Funding may be requested up to 60 days prior to the start date of the event and up to 30 days following the event end date.

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- i. In order to request the funding, the event organizing committee must complete the SIG Regional Event Funding Application Form and submit it via email to the CFMS SIG coordinator ([sigs@cfms.org](mailto:sigs@cfms.org)), and copy (i.e. cc) the CFMS Vice-President of Finance ([finance@cfms.org](mailto:finance@cfms.org)), the CFMS General Manager ([office@cfms.org](mailto:office@cfms.org)), and the CFMS's accountant ([wjr@wjradsburn.com](mailto:wjr@wjradsburn.com)).
- ii. If expense claims are not postmarked within 30 days of the end of the event, they will not be processed.

5.4. SIG Regional Event Funding is subject to the same restrictions as in section 1.2 above.

5.5. Per section 1.4ii, it is expected that the CFMS be recognized in the same way as any other sponsor who contributes the amount of \$500.00 to the event in question.

- i. Provision of CFMS sponsorship for an overall initiative via SIG Regional Event Funding does not denote CFMS endorsement of all initiative or event activities.

5.6. Regional events which are provided with SIG Regional Event Funding should be inclusive and run at all times in a way that does not jeopardize the professionalism or reputation of organizers, participants, or the medical profession.

- i. If at any time, the regional director, event organizers, or event participants have a concern regarding the appropriateness or professionalism of activities associated with the event, they should contact the SIG coordinator with their concerns.
- ii. If a SIG-funded regional event or activities within its scope put the professionalism and reputation of medical students or the medical profession at risk, the regional event may have its SIG Regional Event Funding revoked and/or not renewed in future years.

5.7. Regional events which are provided with SIG Regional Event Funding must complete an annual report and submit it electronically to the SIG coordinator at [sigs@cfms.org](mailto:sigs@cfms.org).

- i. The annual report is due 60 days after the end of the event.
- ii. If the annual report is not submitted, the event will be ineligible to receive funding in the next funding cycle.

Please note that these Guidelines are subject to change. It is the responsibility of Applicants and SIG winners to remain up-to-date with the Guidelines, as the most recent version shall supersede any previous version.

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