

Facility Engagement Guidelines for Activity Intake, Review and Assessment

PURPOSE: The purpose of these guidelines is to support Medical Staff Associations (MSAs) in their intake, review and assessment of Facility Engagement (FE) funded activities. By adopting a structured and transparent approach, MSAs will be better positioned to:

- Provide clear, concise and transparent guidelines for applicants (e.g., physicians, health authorities) who wish to propose projects and/or engagement activities.
- Spend funds in a fiscally responsible way by utilizing guidelines, and provide rationale for why certain activities are funded and others are not.
- Ensure activities are aligned with the strategic direction of FE and the MSA.
- Make decisions around terminating funding for activities that no longer align with the strategic direction of FE and the MSA, no longer adhere to MOU objectives and criteria, or have stalled due to lack of capacity or support.

Three phases:

1. Intake of new projects:

- Request for Proposals (RFP) that align with the beginning of the fiscal year is ideal as the MSA working group (WG) will have the clearest understanding of funds available. Activities that receive a green light in concept can create a 12 month budget once support for the idea has been granted. The budget will be approved by the WG at the following meeting.
- For those WGs where an RFP once a year is not practical, or where ideas emerge throughout the course of the year in response to situations at the facility, WGs can adopt a rolling intake process. Funds allocated to activities that are approved through this process should be pro-rated to align with the fiscal year.

2. Review of existing activities:

- Activities should be reviewed at a time pre-determined by the WG to track progress of milestones and spending in relation to their proposed budget.
 - Activities that are significantly underspending can have part of their budgets re-allocated during the funding period.
 - Activities that are overspending and need more funds can make the request by submitting an updated proposal and rationale for an increase in funds.
 - Activity leads should be made aware of these potential re-adjustments at the time their funding is approved.

3. Assessment of existing activities:

- All activities, regardless of their start date, should be reviewed at the end of the fiscal year for either a continuation of funds into the next fiscal, continuation to next fiscal with a modified scope, or termination.
- This can be done by presentation of the activity lead at the WG meeting, as well as a submission of an updated proposal and budget if changes are needed.
- For MSAs with a large volume of activities, suggested methods to manage the review and assessment activities include striking a WG sub-committee to focus on this, or have the MSA project manager collate written status updates and make recommendations to WG, or hiring an external evaluator to support activity assessments.