

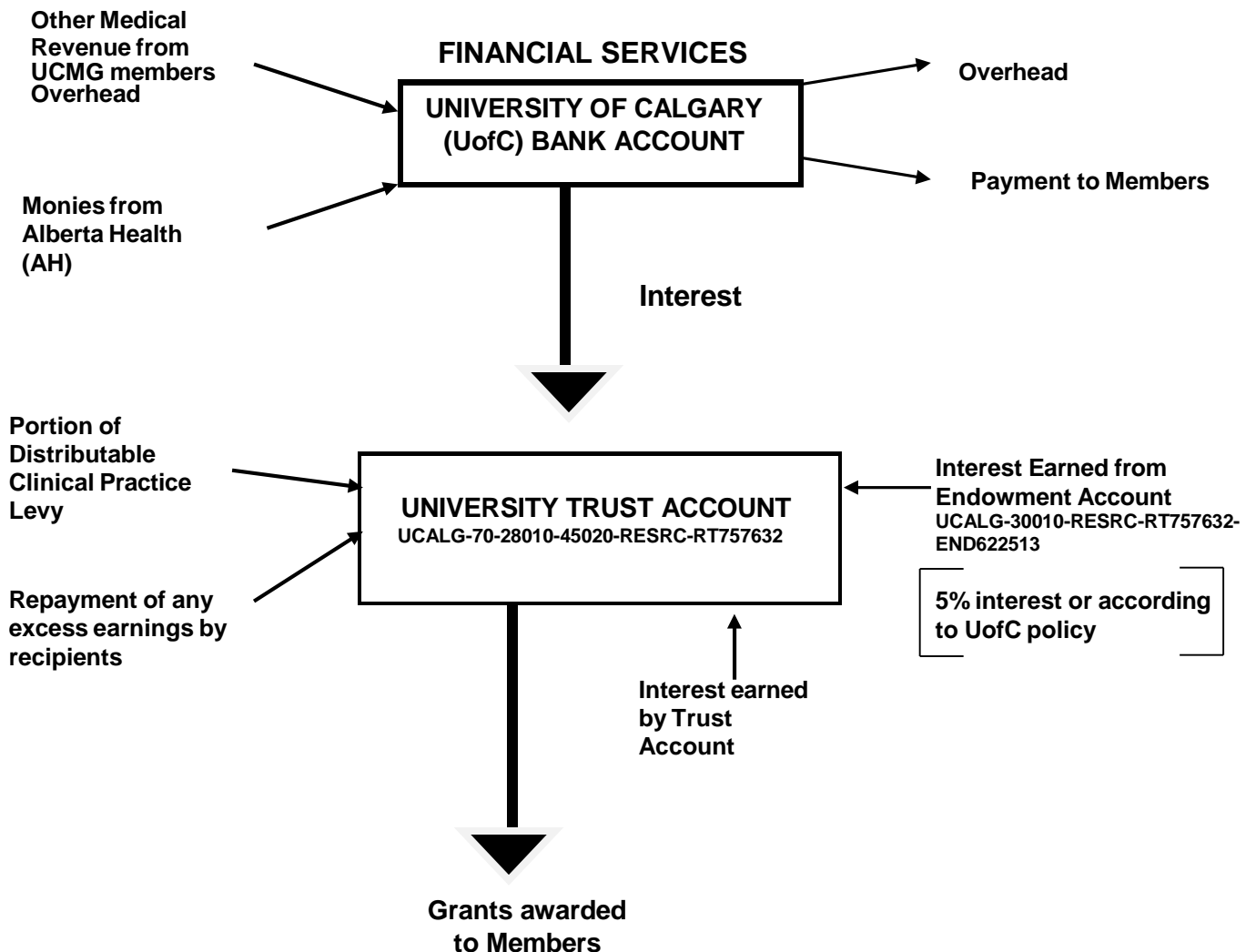


UNIVERSITY OF CALGARY MEDICAL GROUP PROFESSIONAL DEVELOPMENT FUND (PDF) GUIDELINES

PREAMBLE

The purpose of the PDF is to provide members of the University of Calgary Medical Group (UCMG) with financial assistance to supplement reduced clinical earnings during an approved Research and Scholarship Leave (RSL). The intent is to allow the PDF to grow while trying to give the maximum available support to members.

FUNDING



There is a UofC bank account under the control of Financial Services into which the following monies are deposited:

- Payments from Alberta Health (AH)
- Other Medical Revenue from members.

Withdrawals from this account are disbursed as:

- Payments to members of UCMG
- Overhead payments

Interest generated in this account is deposited into the University Trust Account (UCALG-70-28010-45020-RESRC-RT757632). This account also receives monies from four other sources:

1. Monies from the distributable Clinical Practice Levy (14%) as determined by the UCMG Executive Council on a yearly basis.
2. Interest from the Endowment Account (UCALG-30010-RESRC-RT757632-END622513), not to exceed 5%, or according to other UofC guidelines if the rate of return is less than 5%.
3. Interest generated by monies already residing in the Trust Fund account.
4. Repayment of any excess earnings by members who have taken sabbatical leave (see Point 2.5).

The maximum total amount available for the current year's awards will be the total of:

- a) That portion of the CPL designated, on an annual basis, to the PDF
- b) Interest from all sources
- c) Unused funds carried forward from previous years.

In years when there is no CPL allocated to the PDF, then an amount equivalent to 3.5% of the total distributable CPL may be drawn from the University Trust Account.

On a yearly basis, the Executive Council will make a recommendation to the UCMG General Membership on where the 14% of distributable Clinical Practice Levy (CPL) as defined in the Agency Agreement (dated June 15, 2000) will go: into the Professional Development Fund (PDF) and/or the Clinical Faculty Renewal Fund (CFRF).

Should the full amount of the funds available in a given year not be spent, the UCMG Executive Council has the discretion of either reinvesting any unspent monies of the award year into the Endowment Fund or leaving the unspent monies in the PDF, for future disbursement.

TERMS OF REFERENCE

1. Payment of the Award

At the commencement of the approved leave, the award allocated in accordance with the terms outlined under Determination and Limitation of Awards in this document (see Section 2 below) will normally be paid quarterly, in advance, by the University of Calgary to UCMG. The UCMG will pay the award to the member as funds are received, and the payments will appear in the member's monthly UCMG statement as Other Professional Revenue. Under special circumstances alternate payment schedules may be arranged at the discretion of the Senior Associate Dean (Faculty Affairs). A PDF award will count toward the calendar year in which the payment(s) is (are) received by the individual, but will not be assessed the clinical practice levy.

2. Determination and Limitation of Awards

2.1 The Executive Council will establish a total dollar value to be awarded as a BASE GRANT based on the amount of money available, as defined on Page 2 Points a-c, and the total amount of funding requested by qualified applicants.

2.2 The calculation of the maximal potential grant will be determined as follows:

Base Grant: The base Research & Scholarship Leave allowance (as determined on a yearly basis by the UCMG Executive Council).

Less: **Any** University salary, clinical supplements, honoraria and other medical revenue (as defined in the Agency Agreement, dated June 15, 2000) that would continue to be received during the Research & Scholarship Leave.

Maximal Potential Grant*

*Maximal Potential Grant cannot exceed the average of the previous last three working years of *net medical revenue*. For those UCMG members in an Alternate Relationship Plan, this will be the average Academic Draw Rate (extraction rate) of the previous three years.

The maximal potential grant will be prorated for the number of months of approved leave.

2.3 For the period of the RSL, if the individual's net medical revenue, plus the amount of the PDF award, exceeds the pro-rated average of the past three years net medical revenue, the excess will be retained by UCMG and returned to the PDF.

2.4 Any member who resigns from the University of Calgary Medical Group during their approved RSL or within an equivalent number of months of their approved leave duration upon their return; is required to return the prorated portion of the approved monies received from the PDF to UCMG. These monies will be calculated by the UCMG Accounting Services and deducted from any monies that are owing to the terminating UCMG member.

2.5 A UCMG member may make application for a PDF award for a maximum of 12 months of RSL funding every 6 years beginning 6 years after joining the UCMG. Up to 6 months of RSL funding may be applied for after 3 years of UCMG membership. However any RSL funding granted prior to end of a 6 year cycle will be subtracted from that available at the end of a 6 year cycle.

2.6 Minimum RSL leave periods permitted are:

2.6.1 Major Clinical (MCL) Voting Member - leaves of 2 – 12 months;

2.6.2 Full Time (FT) Voting Member - leaves of 6 - 12 months.

Qualifying Service	Length of Fellowship
3 years	To a maximum of 6 months
6 years	To a maximum of 12 months

*Collective Agreement between the Faculty Association of the University of Calgary and the Governors of the University of Calgary dated July 1st, 2013.

2.6.3 Education leaves of up to one year will be approved and funded at the discretion of the UCMG Executive Council provided funds are available after the annual PDF awards have been made.

2.7 An Academic Clinical Supplement is available for short term leave (up to six months) where AARP funds or Fee for Service (FFS) billings are lost. An applicant must have a minimum three years of qualifying service. The Academic Clinical Supplement is based on 1.0 FTE and calculated as per Section 2.2 above. It will be prorated if less than 1.0 FTE. The applicant must have a well-defined plan and written support from the respective Department Head when applying for support from the Academic Clinical Supplement. The plan must be approved by the UCMG Executive Council to be eligible for funding. The applicant will have no clinical FFS work or AARP funding while on leave. Should the applicant receive any FFS earnings or AARP funding while on leave, these earnings will be deducted from the Academic Clinical Supplement grant. Following completion of the leave the applicant must return to service for a time equal to the leave supported by the Academic Clinical Supplement. Where a short-term leave is funded and a subsequent RSL request is made within six years, the cumulative grant amount will not total more than the eligible amount of RSL funding for the cycle.

2.8 A Terminal Clinical Supplement is available to assist members who are retiring from either a FT or MCL position, taking an approved RSL, and then returning as a UCMG Major Clinical member with the equivalent of at least 0.4 FTE for a period of time equal to the time of the approved RSL.

2.9 Consideration will be given under special circumstances to applicants who apply after the January 31 deadline. Such special requests must have supporting documentation from their Department Head and the Dean. The Executive Council retains the right to seek further supporting information/documentation, should the reason for the special request not be clear.

- 2.10 In years where the annual PDF funding requested by members exceeds the total maximum amount available for PDF awards in that year, the UCMG Executive Council will have the options of limiting the total number of awards available and/or reducing the base grant (section 2.1). If the number of awards are limited, requests will be ranked based on the following priorities in the order listed:
1. Members who have the fewest PDF funded RSL months per total years of UCMG service.
 2. Members with the longest interval from the last PDF award.
 3. Members with longest interval between PDF awards.
 4. Where more than one member from a department requests a RSL the Department Head will prioritize the member requests.

3. Applications

- 3.1 In order to qualify for assistance from the PDF, an individual must have been a member of UCMG for a minimum of three consecutive years prior to the date the leave is to commence, and have received prior written approval for the leave from their Department Head and the Dean of Cumming School of Medicine, and the University of Calgary, where appropriate.
- 3.2 Applications should be made by letter to the Senior Associate Dean (Faculty Affairs) by January 31st prior to the scheduled commencement of the member's leave. Under unusual circumstances applications may be considered at other times.
- 3.3 Applications will include the following information
- 3.3.1 start and end dates of approved leave;
 - 3.3.2 a record of ongoing support during the approved leave, such as University salary (for FT), clinical supplement payment, and any ongoing medical revenue, as defined in the Agency Agreement dated June 15, 2000.
 - 3.3.3 amount of net medical revenue in each of the last three complete calendar years and/or the Academic Draw Rate (extraction rate) of the last three complete years paid determined by your Departmental Alternative Relationship Plan;
 - 3.3.4 amount of previous PDF award(s) and total duration (months) of applicable leave(s);

3.3.5 evidence of approval from Department Head, Dean of Cumming School of Medicine, and the University of Calgary, where appropriate;

3.3.6 years of UCMG membership.

3.4 The applicant must inform the Senior Associate Dean (Faculty Affairs) of any changes in the approved leave. The Senior Associate Dean (Faculty Affairs) will use these guidelines to make adjustments in the award because of changes in the approved leave.

3.5 The applicant must submit a written report to the Senior Associate Dean (Faculty Affairs) upon return from the approved leave.

4 Application Review Process

All applications will be reviewed by the Associate Dean (Faculty Affairs). Subsequent to the approval by the UCMG Executive Council, the Associate Dean (Faculty Affairs) will, by March 31st, make a final recommendation to the Dean concerning:

- the number of awards made,
- the amount of each award, and
- the recipients.

The final decision will be the responsibility of the Dean who will advise the Senior Associate Dean (Faculty Affairs) by April 30th.

5 Fund Guidelines Review

The PDF guidelines will be reviewed on a yearly basis.

6 Report to the Membership

The Senior Associate Dean (Faculty Affairs) will make an annual report to the membership at the annual general meeting where the financial statements are presented.

Approved by the UCMG Management Committee, February 9, 1999 (130.2.3)
Approved by the UCMG Executive Council, March 14, 2001 (151.2.4)
Approved by the UCMG General Membership, June 7, 2001 (37.2.4)
Approved by the UCMG Executive Council, February 13, 2002 (159.2.6)
Funding Clause diagram presented to UCMG General Membership, June 20, 2002 (39.3.2)
Approved by UCMG Executive Council, April 9, 2003 (170.3.2)
Approved by the UCMG General Membership, July 3, 2003 (40.3.2)
Approved by the UCMG Executive Council, January 11, 2006 (196.3.1)
Approved by the UCMG Executive Council, May 10, 2006 (198.3.1)
Approved by the UCMG General Membership, June 8, 2006 (43.3.1)
Revised by the UCMG Executive Council, Jan 6, 2010 (draft)
Revised by the UCMG Executive Council, Nov 24, 2010 (draft)
Approved by the UCMG Executive Council, Jan 12, 2011 (220.3.4)
Approved by UCMG General Membership, May 25, 2011 (49.4.1)
Approved by UCMG Executive Council, Nov 10, 2011 (224.3.3)
Approved by UCMG General Membership, May 23, 2012 (50.4.1)
Approved by UCMG Executive Council, Jan 06, 2016 (247.3.6)
Approved by UCMG General Membership, June 08, 2016 (54.4.2)