

# Development of a Tool to Evaluate Staff Requests for Funding Support to Attend Conferences

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## INTRODUCTION

External conferences continue to play an integral part in most educational programs for pharmacy staff. Although they are not the only component of such programs, the value of networking, sharing of ideas, and stimulation obtained through attendance at conferences should not be underestimated. However, with decreases in travel budgets — if they exist at all — the absence of travel assistance in most written contracts, and the decreasing availability of travel grants, there is a need to look at funding policies for attending external conferences.<sup>1</sup> Amalgamation into one provincial pharmacy program within the Alberta Cancer Board provided the opportunity for us to compare the existing internal policies of the pharmacy departments of the Tom Baker Cancer Centre and the Cross Cancer Institute and to develop a single consensus framework. The issue of external conference funding was discussed by a team consisting of 5 members from our pharmacy department, representing administration, specialty practice, general practice, pharmacist and technician perspectives. The objective was to formulate one process for a provincial department of pharmacy. The approach of the development team was to ascertain the organizational rules that pertained and to benchmark other colleagues' practices, since the medical literature on this topic is sparse.<sup>1</sup> The final result of this work is shared in this paper.

## DESCRIPTION OF FUNDING FOR EXTERNAL CONFERENCES

The purpose of developing a policy on funding to attend external conferences was to promote continuing

education and professional development for individual staff members and an increased knowledge base for the department. It was also meant to define the criteria for eligibility and the cost-sharing structure for continuing education programs to ensure equitable distribution of available resources.

According to our organization's governing policies, funding for attendance at external conferences can range from 50% to 100% reimbursement of expenses incurred. Several conditions are applied to the funding approval, such as use of the most economical means of travel and rules for accepting travel grants.

When pharmacy colleagues in other cancer agencies and regional health authorities were asked about how their funding decisions are made, 2 consistencies emerged. First, there was no single system used by the majority of colleagues that we could embrace, and second, a number of useful elements within individual systems became apparent.

Staff "multivoted" to identify the top 5 conferences for which we should attempt to obtain educational travel funds. Multivoting is a consensus technique in which team members rate the relative importance of choices by distributing a value (in our case, 5 votes) across the options of conferences.<sup>2</sup> Each team member can distribute this value among as many or as few choices as desired, e.g., 5 votes for 1 conference or 1 vote for each of 5 conferences.

The team agreed that the final process should be consistent with our department vision — "Working together to provide excellence in patient-focused care, education, and research". The following elements were incorporated to this end:

- "working together" — sharing with department staff knowledge gained by attendance at any conference



- “to provide excellence” — priority given to excellent conferences
- “in patient-focused care” — maximum of 2 staff at any conference, and attendance may be limited by patient care needs
- “education” — need for increasing knowledge base of the individual and the department
- “and research” — ideas for conferences and attendance at previously unknown conferences.

After reviewing the organizational policies and the funding mechanisms employed by others, the team was unable to pick an existing system. During one brainstorming session, it was suggested that we try to incorporate all the elements that we felt to be important, rather than picking only one. What emerged was a number of elements that could be graded by the staff member applying for support; the cumulative result would provide a total score ranging from 50 to 100. The formula is meant to be consistently applied to individuals within the department of pharmacy, recognizing that both budget and site-specific patient care needs may necessitate a different distribution. These elements can be considered in 3 main categories: conference elements, organizational elements, and individual employee elements. Appendix 1 presents the format used, and the following explanation is related to the outline.

### Conference-Related Elements

*Geography:* This element recognizes that conferences farther away have more financial impact on those attending them.

*Content of Conference:* The value that we assign to various types of conferences reflects our departmental priorities, which are (in order) oncology, specialty, pharmacy, and general conferences. The MD Anderson Oncology Pharmacy Symposium would be an example of a conference with oncology content.

*Disciplines:* This element deals with the target audience of the conference. In keeping with the Alberta Cancer Board’s patient-focussed care model of service delivery, conferences that are geared to multidisciplinary participation are assigned higher values. Scores are assigned to conferences from lowest to highest on the basis of the following target audiences:

- pharmacists or technicians only (single-discipline option)
- both pharmacists and technicians (pharmacy-discipline option)
- pharmacy plus one other discipline (dual discipline option)
- a wide range of health disciplines (multidisciplinary option).

### Alberta Cancer Board Framework Elements

*Relevance to Alberta Cancer Board:* Provincial policies on travel outline certain aspects that should be considered, one of which is relevance to the organization. A clear relationship to a point in the business plan would define relevance to the Alberta Cancer Board. Pertinence to the Alberta Cancer Board means pertinent to a program or project that the staff member is involved in but that is not represented in the business plan. Future direction might include technology expansion or home infusion. If there were no relevance to the Alberta Cancer Board, the conference would be coded as having no direct impact for the Cancer Board.

*Profile for Alberta Cancer Board:* If an individual is attending a conference, she or he is creating some personal networking as well as a profile for the Alberta Cancer Board. This profile increases if the staff member has been on the organizing committee or has had a poster or abstract accepted for the conference. The highest profile is gained if the staff member is a speaker.

### Individual Staff Elements

*Impact on Department:* This element recognizes the budget impact of the individual’s attendance at the conference. If the person’s attendance at the conference does not have a budget impact, for example, if days off, unpaid leave of absence, or vacation days are used, we increase the percentage of the costs of attendance that are covered. A paid leave of absence is at the other end of the spectrum; in this situation, the person applies for paid leave and a lower percentage of the costs of attendance are covered. The middle options recognize that it is not always “all or none”. An example of a 50/50 situation for a 2-day conference would be paid leave of absence on Friday and the staff member’s own time on Saturday.

*Years Employed:* This element recognizes long-term employees, but still allows for new staff to attend conferences. The organization is also investing heavily in new employees through on-site training. It was felt by the team that by 3 years, this on-site investment would be fully realized, and this is reflected in the formula.

*Status of Employment:* Numerous methods relating to status of employment, such as hours worked or seniority, are used in other systems. We do not preclude anyone from applying for external conference funding; rather, their status within the department is reflected by the weighting given to this element. Status can be determined by departmental opportunities or personal life choices, such as part-time work.



*Assistance in Obtaining Funds to Help with this Request:* In some cases, individuals can obtain travel funds from outside sources. A value of zero is assigned when the assistance is unnecessary or when the individual is unable to attempt obtaining such assistance. "Attempt to assist" is applicable if the individual has completed paperwork such as a foundation application or an application for a travel grant from CSHP.

*Publications (Last Fiscal Year):* We wished to recognize the extra effort necessary for publication. Peer-reviewed publications (such as journals) are self-explanatory. Any publication without peer review is considered non-peer-reviewed.

*Funding for External Conferences Received:* This element recognizes that staff who have already received funding may be interested in attending other conferences, but that the frequency of such funding should also increase their personal financial commitment. Although staff can apply to go to a specific conference each year, staff who have not attended a conference recently will score more points on this element.

*Your Job — Pertinence to Day-to-Day Activity:* This element was included to recognize that as we move to specialty areas, we need to focus our conference attendance. For instance, the pain and symptom control pharmacist would code 10 for a pain conference that is known to us. For the same conference, another pharmacist would code either 5 (nice to have) or 7 (potentially pertinent) if she or he was to join the pain and symptom control team over the next few months.

## General Points

The formula does not apply to conferences that staff attend at the request of the Alberta Cancer Board (according to institution policy, such attendance is fully funded), in cases where all travel expenses are covered because the person has been chosen as a speaker for the conference, or where travel expenses are covered because the person has been invited to attend a research meeting.

The team also wanted to ensure that we support individuals to the greatest extent possible. Thus, the funding formula determines both the level of support and the ranking of the applicants.

The funding formula has been used successfully since 1996. Staff now have a consistent formula that is uniformly applied to conference attendance and financial support. The range of funding has been between 67% to 89% for the 5 top-priority conferences of the department, and there have been over 30 instances of staff using this tool in its current format. The department has shared in the knowledge gathered at the prioritized conferences through newsletter articles submitted by staff upon their return. We continue to receive applications for funding support and attendance at conferences and now have a framework to assist in this decision-making.

## References

1. Vaida AJ. Budgeting for staff pharmacists to attend educational meetings. *Am J Hosp Pharm* 1993;50(11):2290-2.
2. Brassard M, Ritter D. *The memory jogger II: a pocket guide of tools for continuous improvement and effective planning*. Methuen (MA): Goal/QPC; 1994. p 93.

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## Appendix 1: Alberta Cancer Board Department of Pharmacy External Funding Formula

Staff Member: \_\_\_\_\_ Conference: \_\_\_\_\_ Date of Request: \_\_\_\_\_

The following formula recognizes a number of elements in external conference funding: the conference itself, the ACB framework influence, and individual staff elements. On any disagreement involving the use of this formula, the final decision rests with the Director of Pharmacy. The sum total will also assist in approving which individuals will attend any specific conference. For each element, review the range of possible values and assign the value most applicable to this request. Sum the assigned values at the end. The potential range of funding that would be considered is 50% to 100%. Your sum total is the maximum percentage the department would be prepared to cover for this request, should both budget and time away from the department be available.

Element	Range of Values				Your Value Assignment
<b>Conference-related</b>					
Geography	City 5	Province 7	Canada 8	North America 10	
Content of conference	General 5	Pharmacy 7	Specialty 8	Oncology 10	
Disciplines	Single 5	Pharmacy 7	Dual discipline 8	Multidisciplinary 10	
<b>ACB framework</b>					
Relevance to ACB	No direct relevance 0	Future direction 1	Pertinent 1	In business plan 2	
Profile for ACB	Personal 5	Organizing committee 6	Poster/abstract 7	Speaker 8	
<b>Individual staff</b>					
Impact on department (hours away)	Paid LOA 5	50/50 own 7	25/75 own 8	No budget impact 10	
Years employed	Less than 1 5	1–2 years 7	2–3 years 8	> 3 years 10	
Status of employment	Casual 5	Temporary 7	Part time 8	Full time 10	
Assistance in obtaining funds to help with this request			None 0	Attempted 3	
Publications (last fiscal year)		None 5	Published ) (non-peer-reviewed) 6	Published (peer-reviewed) 7	
Funding for external conferences received	In last year 5	In last 2 years 7	In last 3 years 8	None in 3 years 10	
Your job — pertinence to day-to-day activity	Nice to have 5	Potential 7	Yes, unknown conference 8	Yes, known conference 10	
					Total

ACB = Alberta Cancer Board, LOA = leave of absence.

