

# PD Support Fund Terms of Reference

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The PD Support Fund is part of the operating budget of BC Renal. This fund is allocated to the Health Authorities and the provincial PD programs to support provincial and Health Authority PD program projects, quality initiatives and enhanced PD education.

## Source of Revenue

The funding comes from the value add rebates included in the provincial contracts for PD supplies. This is determined on an annual basis and is subject to change based on future contract terms.

## Designation of Funds

Base funding is allocated to each PD program per fiscal year, and the balance of the approved funding will be prorated based on actual PD patient years volume from the previous fiscal year. The remaining balance will be managed at the provincial level to support PD provincial projects and initiatives. Funding will be allotted to Health authority and provincial PD programs based on an annual financial commitment plan/proposal (see appendix A). These plans are to be submitted by designated deadlines to ensure they are vetted through a formal approval process (see table on page 3).

As part of the operating budget, PD support funding must be spent within the fiscal year. Unused funds may be reallocated for provincial initiatives or other HA PD quality initiatives. Any remaining unused funds will be transferred to the PHSA operations budget at year end.

Should programs recognize that they will not be utilizing their yearly allotment, every effort should be made to inform BC Renal finance for consideration of redeployment of funds to other PD programs or provincial projects.

## Purpose

- To provide additional funding to support projects/pilots focused on PD quality improvement, process changes and improvement to patient care.
- To optimize peritoneal dialysis (PD) in each of the PD programs in British Columbia through local educational activities of all allied health professionals working in these programs.
- To supplement time limited, enhanced PD professional continuing education for all PD team members.
- To provide home therapies fellowship funding to sustain medical leadership in the peritoneal dialysis specialty in BC.

## Considerations for use of Fund

- This trust fund cannot be used to finance any aspect of a PD program or HARP that has been or should be funded out of operational dollars.
- This fund is intended for all nursing, physician, and allied health staff as supplemental to whatever educational monies already exist, not instead of.
- Project intent forms and commitment plans must be submitted on an annual basis.

Reimbursement will be applied only to the committed plan.

- Access to funding will be through the PD programs, working through their health authority renal program (HARP) leadership team, not the health authority.
- Every effort should be made to register for conferences and events in a timely fashion in order to benefit from “early bird” registration fees, reduced travel costs, etc.

### **Potential Uses of the PD Support Fund**

- PD quality initiatives or PD research.
- Conferences/ seminars/ workshops to support continuing PD professional education.
- Pilot and short term PD projects to provide added value to the care of PD patients and their families.
- Development of educational materials for PD patients and families.
- Development and coordination of educational events to promote peritoneal dialysis to renal patients and their families

### **The PD support fund cannot support:**

- Capital expenditures above \$5000.
- Capital expenditures related to HA operations (i.e. dialysis chairs for hemodialysis units).
- Staff engagement (gift cards, flowers, t-shirts, farewell parties).
- Travel and accommodation expenses for patients.
- Projects not related to or impactful to PD care.

- Non PD-related education or initiatives.
- Duplication of provincial PD educational tools.
- Wage replacement.
- Subsidizing health authority deficit or non-renal program expenses.

### **Accountability**

- The process is to remain transparent and each program is accountable for the funds committed.
- Proposals for use of the funds are to be decided upon at the local PD program level where practicing clinical members of the PD team and HARP leadership team, including program manager, are present.
- Project intent forms, or commitment plans, are to be forwarded to the BC Renal on an annual basis.
- Expense reimbursement will only occur if commitment plans are submitted and expenses are directly related to activities/ projects outlined in the plans.
- Each PD program is to determine the appropriate mechanism for sharing of skills and knowledge of attendance at conferences/seminars, but there is an expectation that the whole program will benefit, even if it is only one individual attending (i.e. efforts made to share knowledge gained).
- Reports will be forwarded to the Executive Committee of the BC Renal.
- Annually, PD support fund project/initiative results from each HA will be reported in Value Add Inserts at BCKD. Completed projects will be identified on the BC Renal website.

- **Reports on projects of \$50,000+:**  
HARPs will produce a BCKD poster and/or presentation for each PD Support fund funded project with funding equal or more than \$50,000.
- **Reports on selected projects at Renal Administrators Committee meetings and Province Wide Nephrology Rounds:** On a rotational basis, at Renal Administrators Committee meetings, HARPs will present one project of interest and applicable in other HARPs. Renal Administrators Committee will choose and showcase one HARP project per year at the Province Wide Rounds.

## Process and Timelines

Step	Category	Process Description	Deadline
1	Initiation of annual PD funding	Each respective HARP leadership team will receive notification of projected PD support funding for the next fiscal year via email.	<b>December 15</b>
2	Submission of commitment summary form and project intent forms	Each HARP will submit <i>PD Support Fund Commitment Plan</i> ( <a href="#">appendix A</a> ) and <i>Project Intent Form</i> ( <a href="#">appendix B</a> ) to BC Renal Finance.  * HARP Executive Sponsor, Medical Director and Administrative Director signatures are required.	<b>January 31</b>
3	Review of submissions	BC Renal finance will collate all submissions and forward it to PD medical director and strategic lead for review. BC Renal executive administrative team will be forwarded a summary of fund allocation and use.	<b>February- March</b>
4	Approval	BC Renal will send funding approval to each HARP leadership team.	<b>April 15</b>
5	Tracking of fund	BC Renal Finance will send <i>PD Support Fund Balance Summary</i> ( <a href="#">appendix C</a> ) balances to each HARP leadership team. Balances will detail the financial commitment plan as determined by the HARP, available funds, actual spending to-date and balance remaining.	<b>Each fiscal period</b>
6	Dissemination of project results	BC Renal Finance team will prepare the PD support fund Value Add Inserts for dissemination to the renal community and industry stakeholders.	<b>Late summer/ early fall</b>
7	HARP reports on projects of \$50,000+	HARPs will prepare a BCKD poster/ presentation for each PD Support fund-funded project with funding equals to or more than \$50,000.	<b>BCKD dates</b>

8	Reallocation of PD support fund by BC Renal	BC Renal will reallocate uncommitted funds for provincial projects and initiatives.	<b>September 30</b>
9	Dissemination of results	<p>BC Renal will request a submission of <i>PD Project Accomplishment Form</i> (<a href="#">appendix D</a>) for <b>previous fiscal year</b> from each HARP leadership team.</p> <p>These reports outline the accomplishments to date of each project, educational or quality initiative.</p>	<b>July 31</b>

## Access to Funds

After PD Commitment plans are submitted to BC Renal finance, funds may be accessed by submitting a *BC Renal Expense Claim Form* ([appendix E](#)).

- Each form must include original copies of receipts or invoices, or detailed calculation for funds requested.
- Each form must clearly identify the commitment plan/purpose, using the submitted HARP PD education fund commitment plan.
- The reimbursement form requires approval from both the HARP Medical Director and Renal Director.

## Financial Tracking

- At each fiscal period end, BC Renal Finance team will send Statement of PD Fund balances detailing the financial commitment plan as determined by the HARPs, available funds, actual spending to date and balance remaining. The report will be sent to HARP Executive Sponsor, Medical Director and Renal Director/Manager/Lead.
- The use of these funds at the PD program level are to be tabulated and reviewed by each program throughout the year and at year end.

## Approval Date

September 5, 2017

## Revised

September 2023

# Appendix A



## PD Support Fund Commitment Plan

2023_24 PD SUPPORT FUNDING BREAKDOWN	PROV
BALANCE AS OF APRIL 1, 2023	\$50,000
COMMITMENT PLANS	PROV
1. Staff Education and Training (please submit a project intent form for total cost of staff education and training)	
2. Patient Education and Training (please submit a project intent form for total cost of patient education and training)	
3. Equipment Purchases (Less than \$5,000/item)	0
4. Projects and Initiatives	
5. Staffing Costs	
6. Research	0
7. Other Expenses	
<b>Total Committed</b>	<b>0</b>
<b>Total Uncommitted</b>	<b>50,000</b>

# Appendix B



## Project Intent Form- PD Support Fund ([download here from the BC Renal website](#))



### PD Support Fund Project Intent Form



<b>HARP</b>	
<b>Project Name</b>	
<b>Project Supervisor</b>	
<b>Project Objective(s)</b>	
<b>Anticipated Benefits for your HARP and the province</b>	
<b>Anticipated Timeline</b>	
<b>Breakdown of Costs</b> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Benefits</li> <li>• Travel</li> <li>• Accommodation</li> <li>• Supplies</li> <li>• Other costs</li> <li>• Total costs</li> </ul>	

\_\_\_\_\_  
Executive Sponsor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Medical Director

\_\_\_\_\_  
Date

\_\_\_\_\_  
Renal Director/Manager/Lead

\_\_\_\_\_  
Date



# Appendix C



## PD Support Fund Balance Summary- Example

**PD SUPPORT FUND\_ -----HEALTH AUTHORITY  
 PD SUPPORT FUND BALANCE SUMMARY  
 Fund Balance - August 20, 2016**

Renal Program	Total
<b>Opening Fund Balance April 01, 2015</b>	0
<b>Base Funding</b>	20,000
Enhanced Funding (Based on Patient Years)	30,000
Enhanced Funding (Additional)	0
<b>Total Fund Available, April 1, 2015</b>	<b>\$50,000</b>
<b>Committed Balance</b>	<b>\$50,000</b>
<b>Total Uncommitted Funds</b>	<b>\$0</b>

COMMITMENT PLANS	Commitment Plan	HA	Balance 20-Aug-16
<b>1. Staff Education and Training</b>	26,000	17,000	9,000
Conference: Western PD Days	13,000	13,000	0
ISPD (International Society for PD)	5,000	4,000	1,000
PD Education Day	4,000	0	4,000
BCKD	4,000		4,000
<b>2. Patient Education and Training</b>	1,000	0	1,000
Introduction to PD - patient education	1,000	0	1,000
<b>3. Equipment Purchases</b>	0	0	0
<b>4. Projects and Initiatives</b>	23,000	13,000	10,000
Evaluation of PD community nurse program	12,000	6,000	6,000
PD End of life project	8,000	4,000	4,000
PD Home visits project	3,000	3,000	0
<b>5. Staffing Costs</b>	0	0	0
<b>6. Research</b>	0	0	0
<b>7. Other Expenses</b>	0	0	0
<b>Total Commitment Plans Funds</b>	50,000	30,000	20,000
<b>Total Uncommitted Funds</b>			
<b>Fund Balance - August 20, 2016</b>			<b>20,000</b>



# Appendix D



## Project Accomplishment Form- PD Support Fund ([download here from the BC Renal website](#))



### PD Support Fund Project Accomplishment Form



Project name	
Project manager/supervisor	
Project costs (actual vs. budgeted costs)	
Key accomplishment and learnings	
Unanticipated barriers or issues	
How will the project outcomes be applied within the HARP?	
How will the project outcomes be applied within the BC renal network?	
Recommendations for next steps	

\_\_\_\_\_  
Executive Sponsor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Medical Director

\_\_\_\_\_  
Date

\_\_\_\_\_  
Renal Director/Lead/Manager

\_\_\_\_\_  
Date



# Appendix E



## Expense Claim Form (download here from BC Renal website)

**BCR REIMBURSEMENT FORM**

**BC RENAL NETWORK**  
The BC Renal Network acknowledges that our offices are located on the traditional, unceded territory of the Coast Salish, home of the Musqueam, Tsleil-Waututh, and Squamish peoples.

260 - 1770 W. 7th Ave  
Vancouver, BC V6J 4Y6



**SECTION A: REMITTANCE INFORMATION**

Cheque Payable to		Invoice Number		Invoice Date	
Mailing Address		Contact Number / Email			
City, Province, Postal Code		Mailing Instruction / Notes for EFT Notification			

**SECTION B: SOURCE OF FUNDING**

Fund <small>(please check one of the boxes below)</small>	Renal Unit / Working Group / Committee <small>(please specify)</small>	Commitment Plan / Purpose <small>(please specify)</small>
<input type="checkbox"/> RRP		
<input type="checkbox"/> PD Support Fund		
<input type="checkbox"/> BCR - Admin / Working Group / Committee		
<input type="checkbox"/> Pharmacy		

**Submission Check List**

- Itemized bills for meals are required.
- For paper submissions, please attach copies of supporting documents (receipts/invoices) with this claim.
- For electronic submissions, please convert Excel, jpeg, or all other file formats to PDF before submission. Submit ONE PDF per claim (including receipts).

**SECTION C: EXPENSE DETAILS**

DATE (MM/DD/YYYY)	DESCRIPTION OF EXPENSES	UNITS	TOTAL (excluding GST & PST)	GST (only if specified on receipt)	PST (only if specified on receipt)	TOTAL
<b>MILEAGE (\$0.61/KM)</b>		No. of KMs	-	-	N/A	-
<b>SESSIONAL FEES (1 session = 3.5 hours ; rate = \$622.45/session) Effective Apr 2022</b>		No. of Sessions	Rate			
			622.45	N/A	N/A	-
<b>SESSIONAL FEES (1 session = 3.5 hours ; rate = \$664.47/session) Effective Apr 2023</b>		No. of Sessions	Rate			
			664.47	N/A	N/A	-
<b>TRAVEL &amp; ACCOMMODATION (Airfare, Ferry, Taxi, Parking, Hotel and Meals, etc.)</b>			A	B	C	A+B+C
		N/A				-
		N/A				-
		N/A				-
		N/A				-
<b>CONFERENCE &amp; EDUCATION (Conference Registration Fee, Course Fee, Tuition, etc.)</b>			A	B	C	A+B+C
		N/A				-
		N/A				-
<b>OTHERS (Equipment, Meeting Expense, Sundry, etc.)</b>			A	B	C	A+B+C
		N/A				-
		N/A				-
<b>TOTAL</b>			-	-	-	-

(\*\*) The BCR will not reimburse any liquor costs

**PLEASE ATTACH ORIGINAL RECEIPTS AND/OR INVOICES WITH THIS CLAIM (In particular, itemized bills for meals are required)**

Expense Recipient	Renal Director/Manager/Lead	Medical Director <small>***Required for RRP Claims ONLY</small>	BCR