

## Financial Sponsorship of Educational and Non-Educational Events Operating Standard

### DEPARTMENT OF FAMILY MEDICINE

Classification Calgary FM Residency Programs	Table of Contents
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- Purpose** 1 This Operating Standard provides clarity to University of Calgary FM Residency Programs on financial sponsorship of educational and non-educational events.
- Scope** 2 This Operating Standard applies to all Residency Programs in the University of Calgary Department of Family Medicine
- Definitions** 3 In this Operating Standard
- 1) **Donation** is a contribution by an entity or individual, for which no consideration is exchanged.
  - 2) **Educational Event** is an event within the Program for the purposes of building knowledge, skills, or attitudes, related to the practice of Family Medicine. Examples include but are not limited to academic half days, and conferences.
  - 3) **Financial Sponsorship** is a contribution by an entity or individual, for which a consideration is exchanged, for example, a table at an event or fair, recognition in newsletters, or promotional signage.
  - 4) **Health Care/Pharmaceutical Industry (H/PI)** is defined in detail in Section

- 5) **Non-Educational Event** is an event within the Program not related to the development of knowledge, skills, or attitudes related to the practice of Family Medicine, but is still core to the Program. Examples include orientation, graduation, and social events.
- 6) **Program** is any Family Medicine Residency Program at the Cumming School of Medicine, University of Calgary. This includes all Family Medicine Enhanced Skills Programs.
- 7) **Resident** is a postgraduate learner enrolled in the Program.

Policy Statement	4	<p><b>4.1</b> All Program-organized Educational Events identified as mandatory to the delivery of the Program (Calgary, Rural and Enhanced Skills) <b>must</b> be properly and fully funded through the Department of Family Medicine and the Cumming School of Medicine.</p> <ul style="list-style-type: none"> <li>a. The Program may however accept and deploy training models donated by medical device equipment manufacturers or pharmaceutical companies for procedural skills teaching where these are not otherwise available, and failing to do so would not lead to the development of competence with respect to these procedural skills</li> </ul> <p><b>4.2</b> Any Program-organized or supported Non-Educational Events identified as regular and integral to any Program <b>should</b> be funded as much as possible through the Department of Family Medicine and the Cumming School of Medicine.</p> <p><b>4.3</b> Supplemental funding support may be sought for Non-Educational Events for the purposes of enhancing the event provided the funding meets the permissions detailed below.</p> <p><b>4.4</b> The Department of Family Medicine and the Program recognize the risk of adversely influencing current and future patient care decisions made by Residents and Faculty when there is funding support from the Health Care/Pharmaceutical Industry for educational or non-educational events/activities.</p> <p><b>4.5</b> The Department of Family Medicine, not the Program, makes decisions about what is permissible within each of its Academic Department clinics.</p> <p><b>4.6</b> Neither the Department of Family Medicine nor the Program can decide upon what is permissible in any clinical setting outside the Academic Department clinics in Calgary.</p> <p><b>4.7</b> The Program makes it clear to Residents, as physicians entrusted with making both current and future decisions about patient care, that they do not approve of Resident participation in H/PI-sponsored events and activities, regardless of the context or setting.</p>
Special Situations	5	<p><b>Additional Funding for FM Residency Program-Organized/Supported Educational &amp; Non-Educational Activities; Permissions</b></p>

**5.1** The use of funding or other forms of support (e.g. advertising materials, event support) provided by Health Care and Pharmaceutical Industry sponsors is not permitted for **any** FM Residency Program Educational and Non-Educational Events, apart from training models as described above.

**5.2** The use of funding or other forms of support (e.g. advertising, event support) by “non-profit” and “physician as direct consumer” sponsors for Educational and Non-Educational Events is permissible as it is felt that, although there may still be benefit to any of these organizations, such benefits are unlikely to be related to, or influence, current or future patient care.

5.2.1 This includes job postings to the Resident Newsletter, which are permissible.

<b>Responsibilities</b>	<b>6</b>	<b>Approval Authority;</b> Family Medicine Residency Program Committee (RPC)
		<ul style="list-style-type: none"><li>• Ensure appropriate rigour and due diligence in the development or revision of this policy.</li></ul> <p><i>Implementation Authority;</i> Family Medicine Postgraduate Director</p> <ul style="list-style-type: none"><li>• Ensures that Program Leaders, Residents and Staff are aware of and understand the implications of this policy and related procedures;</li><li>• monitors compliance with the policy and related procedures;</li><li>• regularly reviews the policy and related procedures to ensure consistency in practice; and sponsors the revision of this policy and related procedures when necessary.</li></ul>

<b>Appendix 1</b>	<b>7</b>	<b>Health Care/Pharmaceutical industry (H/PI)</b>
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*H/PI companies/organizations are defined as for-profit entities that develop, produce, market, or distribute drugs, devices, products, services, or therapies that may be prescribed to patients or ordered by doctors to diagnose, treat, monitor, manage, and alleviate health conditions.<sup>1</sup>*

Examples of organizations that fall under H/PI definition<sup>2</sup>:

- Pharmaceutical companies
- Medical device manufacturers
- Board of a private clinic
- Private cosmetic surgery clinic
- Trade and generic sectors of for-profit H/PI

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<sup>1</sup> National Standard for Support of Accredited CPD Activities:  
<https://www.cfpc.ca/CFPC/media/Resources/Continuing-Professional-Development/National-Standard-for-Support-of-Accredited-CPD-Activities-FINAL-ver-23-1.pdf>

<sup>2</sup> CFPC's Relationship With the Health Care/Pharmaceutical Industry:  
[https://www.cfpc.ca/CFPC/media/PDF/Industry\\_Task\\_Force\\_recommendations\\_ApprovedNov2013.pdf](https://www.cfpc.ca/CFPC/media/PDF/Industry_Task_Force_recommendations_ApprovedNov2013.pdf)

- Physicians having ownership shares in institutions like nursing homes

Examples of companies/organizations that do not fall under H/PI definition:

- Electronic Medical Records – Not at the moment, but if they communicate directly with patients, then would be considered as HPI organization
- Financial services providers
- Government releasing formularies
- Medical reference software and services
- Practice management software

<b>Procedures</b>	<b>8</b>	<p>Solicitation of Financial Sponsorships or Donations</p> <p>8.1 When soliciting financial sponsorships or donations to support Program activities, the Program <b>must</b> follow all University of Calgary approved procurement policies and procedures.</p> <p>8.2 Legal agreements are required for all Sponsorships or Donations and <b>must</b> use University-approved contracts and documents, and follow the necessary processes as required by the University.</p> <p>8.3 Program or University identifiers and branding <b>must not</b> be used to solicit Sponsorships or Donations for non-official Program activities or events.</p>
<b>Instructions/Forms</b>	<b>9</b>	None
<b>Standards</b>	<b>10</b>	None
<b>Parent Policy</b>	<b>11</b>	<p>Gifts, Donations and Sponsorship Policy – University of Calgary  <a href="https://www.ucalgary.ca/legal-services/sites/default/files/teams/1/Policies-Gifts-Donations-and-Sponsorship-Policy.pdf">https://www.ucalgary.ca/legal-services/sites/default/files/teams/1/Policies-Gifts-Donations-and-Sponsorship-Policy.pdf</a></p>
<b>Related Policies</b>	<b>12</b>	None
<b>Related Information</b>	<b>13</b>	None
<b>References</b>	<b>14</b>	<p>CFPC's Relationship With the Health Care/Pharmaceutical Industry:  <a href="https://www.cfpc.ca/CFPC/media/PDF/Industry_Task_Force_recommendations_AprovedNov2013.pdf">https://www.cfpc.ca/CFPC/media/PDF/Industry_Task_Force_recommendations_AprovedNov2013.pdf</a></p> <p>National Standard for Support of Accredited CPD Activities:  <a href="https://www.cfpc.ca/CFPC/media/Resources/Continuing-Professional-Development/National-Standard-for-Support-of-Accredited-CPD-Activities-FINAL-ver-23-1.pdf">https://www.cfpc.ca/CFPC/media/Resources/Continuing-Professional-Development/National-Standard-for-Support-of-Accredited-CPD-Activities-FINAL-ver-23-1.pdf</a></p> <p>CPSA Standard of Practice on Relationships with Industry:  <a href="https://cpsa.ca/physicians/standards-of-practice/relationships-with-industry/">https://cpsa.ca/physicians/standards-of-practice/relationships-with-industry/</a></p>
<b>History</b>	<b>15</b>	<p><i>Approved:</i> 2017-12-14 PGEC approved</p>

*Effective:* 2017-12-15

*Revised:* 2017-12-23 document in policy format  
2025.05.16 – Converted to Operating Standard; clarified medical device training

*Revised/Approved:* FM RPC 2025-05-15

- Allow for medical device/pharmaceutical industry samples for procedural skills teaching and removing sponsorship of Education Events
- Approval to seek sponsorship for job postings via newsletter