

# Health Care Unburdened Grant program

## Terms & Conditions

The Canadian Medical Association (CMA), MD Financial Management Inc. (MD) and Scotiabank together are firmly committed to supporting the medical profession and advancing health in Canada. As proof of this commitment, Scotiabank, in collaboration with the CMA and MD, is investing \$115 million over 10 years to support physicians and the communities they serve across Canada.

The Health Care Unburdened Grant program is one initiative supported by this investment.

The Canadian Medical Association (CMA), MD Financial Management Inc. (MD) and Scotiabank are the sponsors (the “**Sponsors**”) and administrators of the the Health Care Unburdened Grant program (the “**Program**”). With the support of an independent review panel, the Sponsors shall consider each Qualified Application (defined below) to the Program and material submitted with or in support thereof, in accordance with these Terms and Conditions. Members of the review panel are acting in their personal capacities and not as representatives of any organization. The review panel will make recommendations to the Sponsors, and the Sponsors are responsible for all Program-related decisions.

Note: Additional collaborators may join this funding initiative at the discretion of the Sponsors.

## Eligibility

Program eligibility refers to requirements that an applicant must meet to be considered for the grant program. These requirements are designed to ensure that applicants align with the overall goals and purpose of the grant program.

- To qualify as an “Applicant” the application must be submitted on behalf of a nonprofit organization or registered charity in Canada.
- Eligible nonprofit institutions and/or organizations include the following:
  - Canadian post-secondary institutions, including medical schools
  - Community health centres

- Health advocacy organizations
- Health charities
- Health professional associations, including provincial and territorial medical associations
- Hospitals and healthcare clinics
- Indigenous health organizations
- Mental health and addiction organizations
- Nonprofit health research organizations
- Pan-Canadian or provincial/territorial health organizations
- To enable a team-based approach, the lead applicant must demonstrate that the project team responsible for the initiative includes a physician, resident, or medical student perspective, as well as at least one of the following roles/perspectives:
  - Patients/caregivers;
  - Health system administrators;
  - Health care leadership/decision-makers
  - Policymakers
  - Other health care providers, which may include nurses, allied health professionals, mental health professionals, etc.

The team may also include one or more members who represent(s) the for-profit sector but are ineligible to apply as the lead applicant.

- To be eligible as a “**Qualified Application**,” initiatives must be:
  - innovations that have a primary focus of reducing administrative burden in health care,
  - must take a team-based approach and include a physician (registered in Canada) or medical learner (registered at a Canadian medical school), as well as other stakeholders as part of the team,
  - submitted in either French or English,
  - submitted through the grant management platform, [www.healthcareunburdened.cma.ca](http://www.healthcareunburdened.cma.ca), and
  - submitted during the Entry Period (defined below)

# Program Ineligibility

Organizations that are neither Canadian not-for-profit organizations nor registered charities are ineligible to apply as lead applicants for this grant. These include:

- For-profit entities: For-profit entities, including for-profit health clinics and long-term care homes, are not eligible to apply as lead applicants for the grant program. For-profit entities can be listed as a team member but must not be the primary beneficiary of the grant funding.
- Entities other than Canadian not-for-profit organizations or registered charities: These include but are not limited to Crown agencies, publicly funded entities (e.g. provincial health authorities), start-ups, for-profit social enterprises and co-operatives. Organizations such as these can be listed as a team member but cannot be the primary beneficiary of the grant funding.
- Non-profits registered outside of Canada: Non-profit organizations that are registered outside of Canada are not eligible to apply as lead applicants.

## Ineligible costs

- The following initiatives/activities/costs are ineligible:
  - Biomedical or clinical research projects (ex. medical experiments, clinical trials, or laboratory-based research).
  - One-off initiatives or products (ex. one-time events, conferences, websites, or other ad-hoc initiatives)
  - General fundraising
  - Capital projects
  - To reduce deficits
  - For annual operating funds or other recurring costs, unless directly linked to the primary purpose of the program
  - For organizational emergency needs
  - Religious purposes

# How to apply

- Applications will be accepted between October 24, 2023, and 6:00 pm ET on December 12, 2023 (“**Entry Period**”). The Sponsors reserve the right to extend the Entry Period.
- The application consists of a written application through the grant management platform accessible through [www.healthcareunburdened.cma.ca](http://www.healthcareunburdened.cma.ca).
- Applicants must also agree to the completion of a profile, including the application title, description, and how they heard about the program.
- Multiple applications may be filed by the same Applicant provided each application is for a different initiative.
- Each application will be reviewed by the CMA to confirm that it is a Qualified Application (defined above).
- All Qualified Applications will be reviewed by the CMA, and a shortlist of Applicants will be subject to an additional due diligence process which will include additional risk management information requested by the Sponsors.

# Conditions of application

- Each applicant must accept the Terms and Conditions of the Program. **This electronic acceptance will constitute the applicant’s agreement that it understands and agrees to be bound by these Terms and Conditions.**
- The Applicant understands and agrees that all materials (in any format) submitted with or in support of any application (“**Materials**”) to the Program shall be received on the following terms:
  - a) The Sponsors will not return Materials to the Applicant.
  - b) The Applicant retains all ownership rights in Materials submitted to the Sponsors.
  - c) Upon submission of Materials to the Sponsors, the Applicant grants the Sponsors a non-exclusive, irrevocable license to use and reproduce any parts of or all the Materials for the purpose of administering the Program.
  - d) The Applicant authorizes the Sponsors to share Materials with the review panel on a confidential basis. The Sponsors will seek permission from the Applicant before sharing the Material or works it creates using the Materials with third parties who are not directly or indirectly involved in the Program.
  - e) The Applicant consents to the collection, use and disclosure of Applicant’s personal information by the Sponsors and agrees to the Privacy Terms included below in these Terms and Conditions (“**Consent**”). The Applicant understands and agrees that this Consent applies to the entire Program.

- f) No claim shall be made, and no action shall be brought against (i) any or all of the Sponsors or any of their affiliate entities, their Trustees, Directors, Officers, employees or (ii) members of the Review Panel (“**Releasees**”) arising out of the review or use made of the Materials, or any personal information, or of any such disclosure made under these Terms and Conditions.
  - g) Applicant acknowledges that the Sponsors may now or in future be independently involved in projects that are in the same field or address the same issue as the Materials and such independent work by the Sponsors is permitted and further, no Applicant may claim any exclusivity in connection to work in a given field or project.
  - h) The Applicant agrees to indemnify Releasees against all claims, losses, costs and damages that Releasees may incur by reason of any breach or alleged breach by the Applicant of the warranties provided in these Terms and Conditions.
  - i) The Applicant shall not seek to circumvent, interfere, hack or otherwise tamper with the grant management platform.
  - The Applicant represents and warrants that:
    - a) disclosure of Materials submitted with, or in support of the application does not breach the terms of any contract of employment or any other contract, and that the Applicant is entitled to make use of the Materials.
    - b) the subject matter of the Applicant’s innovation and the Materials the Applicant submits does not contain material that is subject to other third-party proprietary rights, including copyright, patent and trademark-related rights, unless (a) the Applicant has permission from the rightful owner of the material or is otherwise legally entitled to submit it, and (b) the Applicant discloses the nature of the third-party proprietary rights to the Sponsors.
  - A Qualified Application shall be considered for only one grant.
  - The Sponsors’ decisions with respect to all aspects of the application process and the awarding of Grants are final. There is no appeal process for any Program decisions by the Sponsors and any Applicant appeal submissions relating to any aspect of the Program made to the Sponsors shall be deleted or returned to the Applicant without consideration.
  - If in the Sponsors’ opinion there are no Qualified Applications that are considered suitable no Grant shall be awarded.
  - The Sponsors are not responsible for any applications or Materials that are incomplete, unreadable or lost owing to technical issues or limitations.
  - The Sponsors reserve the right, in their sole and absolute discretion, to withdraw, suspend or amend the Program (or amend these Terms and Conditions) in any way at any time.
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- In the event of any discrepancy or inconsistency between the English version of the Terms and Conditions and disclosures or other statements in any other Program related materials (including the French version of these Terms and Conditions), the English version of these Terms and Conditions shall prevail. The procedures and current Terms and Conditions will be made available on the CMA website or by request: [funding@cma.ca](mailto:funding@cma.ca).

## Evaluation criteria

- Qualified Applications will be evaluated based on the following weighted criteria:
  - 1. Evidence of need (10%)**
    - Refers to the clear identification and substantiation of the problem or issue that the proposed initiative seeks to address. To demonstrate need, applicants need to provide evidence the administrative burden for physicians exists and significant within their setting.
  - 2. Impact (30%)**
    - Refers to the potential measurable outcomes and changes that the funded initiatives are expected to achieve in reducing administrative burden for physicians and related stakeholders.
    - The program aims to support initiatives that:
      - lead to significant reductions in administrative burden for physicians
      - benefit providers, patients and systems
      - minimize negative impacts
      - are supported by appropriate measurement and evaluation
      - take new or novel approaches or apply existing solutions within a new context.
  - 3. Feasibility (20%)**
    - Refers to the practicality and likelihood of successful implementation of the proposed initiative to reduce administrative burden for physicians. It involves assessing whether the initiative is realistic, achievable, and supported by evidence of effectiveness and usability.
  - 4. Sustainability and scalability (20%)**
    - Refers to the ability of the funded initiatives to be expanded, replicated and maintained on a larger scale beyond the scope of the grant program. A scalable initiative is one that can grow and be implemented in multiple settings or regions to achieve broader impact. A sustainable initiative is one that can be maintained and supported in the long term, even after the grant funding has ended.

## 5. Collaboration (20%)

- Refers to the cooperative and mutually beneficial approach taken by the project team responsible for the proposed initiative. Collaboration involves working together with appropriate and diverse stakeholders, organizations, and individuals who are in alignment to develop, implement, and sustain the initiative. It prioritizes reconciliation, diversity, equity and inclusion throughout the team and processes.
- Evaluation reports are internal documents of the Sponsors and will not be shared in their entirety with Applicants or the public.

## Grants

The Program will offer up to 15 grants (each a “**Grant**”), to a maximum of \$10,000,000 total. Available funding per grant is between \$500,000 and \$1,000,000. The grant funding period will be two years. All amounts are in Canadian currency and shall be inclusive of any sales, good and services, excise, value added or similar taxes of any kind as applicable whether of federal or other jurisdictional level.

Successful Applicants will be eligible for a one-time grant to be used toward costs relating to the initiatives described in their application. Grants will be awarded in spring 2024.

As a condition of receiving a Grant, successful Applicants will be required to sign a grant disbursement agreement, confirming their agreement to these Terms and Conditions and Program administration obligations including, without limitation, a direction for payment (the “**Grant Disbursement Agreement**”). Without limiting the scope of the Grant Disbursement Agreement, the Sponsors may require Applicants to submit progress reports on the initiative and to grant the Sponsors the necessary rights to use the Material to promote and market the applicant’s innovation, the Applicant, the Program and the Sponsors. Payment of grants may be made in one or more payments, over a 24-month period, in connection with progress reports. If a successful Applicant chooses not to sign the Grant Disbursement Agreement, the Sponsors may decline to provide the Grant to the Applicant and may select another Applicant.

Successful applicants are responsible for determining any tax implications related to the receipt of the grant. The Sponsors are unable to provide tax or legal advice to Applicants.

## Re-application

Applicants may apply multiple times to the Program, provided each application addresses a distinctly different initiative. Only one grant per Applicant will be permitted.

# Application procedure

Your application will not be considered complete unless all Qualified Application requirements have been met. The Sponsors may deem an application to be ineligible for any reason.

Those Applicants who are selected by the review panel will be required to submit additional due diligence information, as described by the Sponsors, within the deadline provided.

The Sponsors will contact all Applicants regarding the outcome of their submission at the end of the assessment period.

# Confidentiality

Applications will be sent to members of the review panel for assessment. All members of the Review Panel shall keep Applicants' submissions confidential. All deliberations about applications are held confidential by the Review Panel.

Please note that the Sponsors may promote and market the submissions of successful Applicants in accordance with these Terms and Conditions, the Grant Disbursement Agreement and any additional Agreement between the Sponsors and the successful Applicant.

# Privacy terms

## *Why information is being collected*

The Sponsors will collect Material submitted with or in support of any Application. In the case of Grant Applicants, the Sponsors may also collect photos, videos and additional information from the applicant. This Material may include the applicant's personal information.

## *What the information will be used for*

The Sponsors will use the information collected to administer the Program. The Sponsors will also use information belonging to successful Applicants to promote the Applicant, the Program, and the Sponsors.

## *When the information will be disclosed*

Except as described below, the Sponsors will not disclose an Applicant's personal information to third parties without consent. The CMA may disclose an Applicant's personal information to members of the Review Panel in order to administer the Program. All members of the Review Panel are subject to a Code of Conduct which includes confidentiality provisions.



The Sponsors may disclose a successful Applicant's personal information in material used to market and promote any or all of the Program, the Sponsors, the Applicant and the Applicant's initiative through any medium and on any platform, including but not limited to website and social media use. For example, the Sponsors may also use and disclose photos, videos for promotional and marketing purposes.

The CMA will store the personal information provided by an Applicant on a third-party virtual server that operates on the Optimy Grants Management platform.

*Opt-out is limited to non-Program-related collection, use and disclosure*

As promotion and marketing of the Program is a central feature of the Program, the Applicant may not withdraw their consent to the Sponsors' Program-related collection, use and disclosure of personal information unless the Applicant withdraws their application.

*Corporate Privacy Policies*

The Sponsors may use the personal information in accordance with their applicable privacy policies, available here: [CMA](#), [Scotiabank](#), [MDFM](#).