



LOCAL EDUCATION GROUP INTRODUCTION

Introduction

Northern Ontario required a different approach to help support clinical faculty in academic, research, and various scholarly activity. Since 2013, an independent organization, the Northern Ontario Academic Medicine Association (NOAMA), has created Local Education Groups (LEGs) to facilitate this undertaking. LEGs are groups of physicians with a faculty appointment at NOSM U working together to provide academic activities and research on top of their clinical duties. The LEGs aim to provide an organizational structure to address the challenges of balancing the demands of providing academics and clinical services.

LEGs were established as part of NOSM U's network to help facilitate the current academic mandate across Northern Ontario. They allow NOAMA and NOSM U to distribute funding to faculty for their scholarly activity at NOSM U. NOSM U's distributed medical education (DME) model has two campuses, more than 1,000 km apart, in Sudbury and Thunder Bay, with clinical learning taking place in many communities across Northern Ontario. The DME model needs an innovative method to support such a spread-out campus. LEGs support NOSM U to provide for its undergraduate and postgraduate learners' academic/curriculum needs. To date, 52 LEGs have been implemented and approved in Northern Ontario.

Alternative Funding Plans (AFPs) in Ontario are funded by the Ministry of Health (MOH) to support the clinical teaching activities of physicians, thus ensuring sufficient clinical learning opportunities for the next generation of physicians. NOAMA was created to administer the agreement between the MOH, the Ontario Medical Association (OMA), NOSM U, the Northern Hospitals, and the Physician Clinical Teachers' Association (PCTA).

The NOAMA AFP funds LEGs to distribute within their group using their autonomy through their personalized governance structure. LEGs are self-organized groups of NOSM U clinical faculty responsible for providing selected medical education services at the undergraduate and postgraduate levels. LEGs also support other academic activities such as professional development, research, and clinical innovation.

Acronyms

| | |
|-------|--|
| NOAMA | Northern Ontario Academic Medicine Association |
| LEG | Local Education Group |
| PCTA | Physician Clinical Teachers' Association |
| NOSM | Northern Ontario School of Medicine |
| OMA | Ontario Medical Association |
| MOH | Ministry of Health |
| AFP | Alternate Funding Plan |
| D&C | Declaration and Consent |
| DME | Distributed Medical Education |
| FHT | Family Health Team |
| CBM | Case Based Module |

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What is a Local Education Group (LEG)?

- Developed in 2013 by NOAMA
- LEGs offer an organizational structure to address the challenges of balancing the demands for the provision of academic and clinical services.
- Membership consists of groups of physicians with faculty appointment with NOSM U.
- LEGs provide a network or organization structure across Northern Ontario to better connect faculty members, communities, and disciplines.
- Self-governing for decision making.
 - Income distribution
 - Dispute resolution.
- Eligibility of membership
 - NOSM U Faculty
 - NOAMA signed declaration and consent (D&C)
 - Active CPSO member

Status of Local Education Groups

- 52 Local Education Groups (LEGs)
- ~1,150 Physicians participating in a LEG

Types of Local Education Groups

- Speciality Departments in Hospitals such as General Surgery, Anesthesia, Psychiatry, Emergency Medicine, Orthopedics, etc. (primarily in Sudbury and Thunder Bay)
- Community-Based groups with various specialists and family physicians – (i.e., Sault Ste. Marie, Timmins, Parry Sound, Kenora, etc.)
- Family Health Teams (FHT) (Primarily in Sudbury or Thunder Bay)
- Pan Northern with a variety of communities with similar interests – (i.e. Palliative Care, Pathology)

How to Establish a LEG

1. Work with NOAMA Administration to prepare a letter of intent to form a LEG. NOAMA will consider the following when approving a new LEG;
 - Eligible membership size and discipline compliment
 - Historical and projected clinical teaching of NOSM U learners
 - Research and scholarly activity accomplished by proposed members
 - Budget or strategic direction that the LEG will pursue
2. Work with the OMA to adopt a governance agreement to be approved by the NOAMA Board

Northern Ontario Academic Medicine Association (NOAMA)

- Governance body created to administer the NOAMA Alternative Funding Plan (AFP) as a transfer payment agency. NOAMA receives ~\$14.5M from the Ministry of Health (MOH).

Members of NOAMA Board:

- 5 Physician Clinical Teachers' Association (PCTA)
- 2 NOSM U
- 2 Hospitals (represented by the Northern Teaching Hospitals Council)

NOAMA's Responsibilities

- Establishes a governance structure for the administration of the AFP and the reporting requirements.
- To collaborate with NOSM U and the Hospital Organization to facilitate the alignment of Academic Activities with NOSM U's mandate.
- Receive, manage, allocate and distribute the Funds to LEGs and/or Group Physicians.
- Approve LEG governance applications and establish guidelines for LEG funding, reporting, and deliverables.
- Report to MOH
- Ensure that Group Physicians collectively provide, at a minimum, the same level of Clinical Services in a Funding Year as was provided in the first Funding Year or in the previous Funding Year, whichever is greater.

NOSM U's Responsibilities

- Continue to set standards with respect to the quality and quantity of education and scholarly activity by the members of NOSM U.
- Continue to appoint academic staff at NOSM U and set policies with regard to appointment, promotion and tenure.
- Set academic standards for NOSM U; and
- Establish academic programs at NOSM U.

LEG Responsibilities

- Develop a local governance model which is transparent, fair and accountable to their members.
- Report to NOAMA in accordance with the agreement and NOAMA AFP
- Facilitate the ongoing delivery of the NOSM U academic mandate by the physician clinical faculty.

LEG Academic Deliverables

NOAMA and the PCTA have agreed upon the "Application of the Funding Formula" and "LEG Reporting Requirements" which outline the framework and guidelines for the LEG funding and reporting of specific academic deliverables.

NOSM U's Academic programs, in both research and education, support NOSM U's vision, mission and values and uphold the University's social accountability mandate through the delivery of programs that respond to the health needs of the communities that NOSM U serves.

In keeping with its vision to provide "Innovative Education and Research for a Healthier North", Distributed Community Engaged Learning (DCEL) continues as NOSM U's distinct model of education and research. The Academic Principles create a framework for the development, delivery, and evaluation of the University's academic programs.

Scheduling Principles

- NOSM U schedules learners to their faculty members who can accept or decline the teaching opportunity
- Faculty members can choose not to be a part of the LEG; however, priority is given to the LEGs when scheduling learners.
- The LEG can contract with and pay non-LEG faculty such as locums. In doing so, the LEGs must comply with NOSM University's policy for clinical faculty and locums.
- In Phase 2 Comprehensive Community Clerkship (CCC) communities, the Site Area Coordinator (SAC) will coordinate and collaborate on all scheduling matters with the LEG administration to ensure clarity and cohesion.
- Although NOSM U is responsible for scheduling their learners, LEGs can assume this responsibility; however, NOAMA does not offer any additional support for scheduling.

Payments – Clinical Teaching Principles

- All payments for NOSM U clinical rotations of physician learners in smaller communities where a LEG is established will be distributed through the LEG.
- NOSM U payments for clinical rotations in specialties or subspecialties, where a LEG exists for that specialty in the site, will be distributed through the LEG.
- One combined payment, including the NOSM U stipend for clinical rotations and the NOAMA AFP enhancement, will be forwarded to the LEG at the end of each teaching block. The payment will include teaching blocks that end in that block time frame.
- NOSM U's approved Clinical Teaching Compensation Plan determines NOSM U's funding transfer to the LEGs. NOAMA's enhancement policy will determine the NOAMA portion.
- The payment process for physicians where no LEG exists in the community or department will remain the same, subject to review by NOSM U programs for the NOSM U payments. NOAMA's enhancement policy will determine the NOAMA portion.

The clinical rotation compensation rates for both NOSM U and NOAMA are as follows:

| NOSM U rates | NOAMA LEG rates |
|------------------------|------------------------|
| Weekly = \$250 | Weekly = \$375 |
| 4 week block = \$1,000 | 4 week block = \$1,500 |

| NOSM U Program | NOSM U Rate | NOAMA Rate |
|---------------------------------|-------------|----------------|
| Undergrad – CBM 108 and CBM 110 | \$250/week | \$187.50/week* |
| Undergrad– CCC Year 3 | \$250/week | \$237.50/week* |
| Undergrad – Year 4 | \$250/week | \$375/week |
| Postgrad | \$250/week | \$375/week |
| Electives | \$250/week | \$375/week |
| PA Learners | \$250/week | \$375/week** |

NOTE:

*Note that payments are paid on exact weeks (i.e. 10-day rotation would be $10/7 = 1.43$ weeks * weekly rate)*

Amounts are subject to change; please refer to the [NOAMA Enhancement Policy](#)

** NOAMA rates differ between different NOAMA programs because NOSM U distinguishes part of the learning for these types of programs as academic and part clinical. NOAMA rates differ since teaching contains both academic and clinical components. NOAMA enhancement funding only applies to the clinical component.*

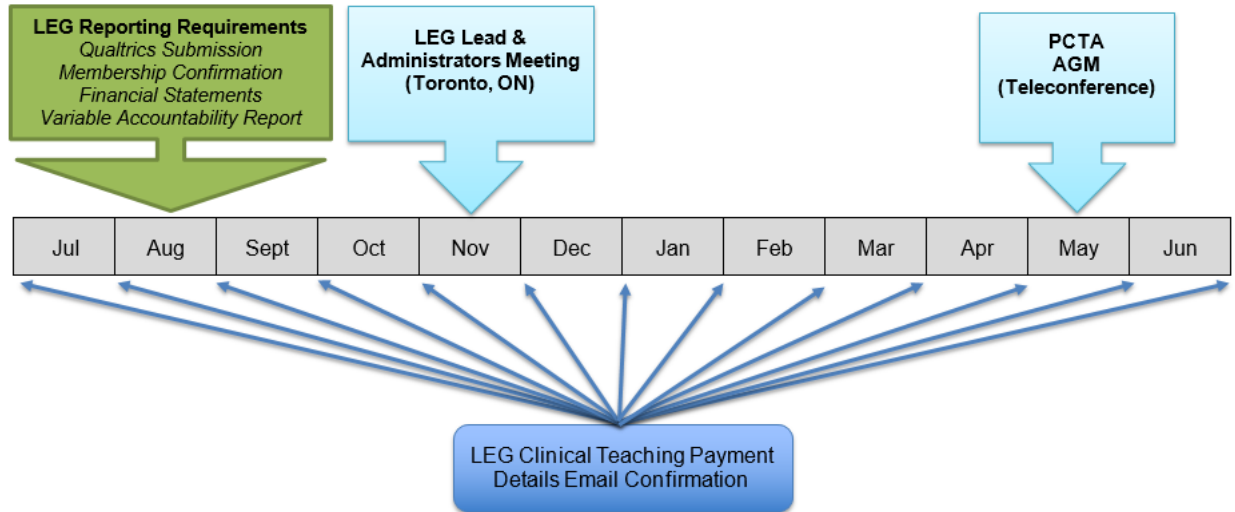
***When supervised by a PCTA member*

Additional Website Reference Material

- [NOAMA Website](#)
 - [Policies and Procedures](#)
- [PCTA Website](#)
 - Login Password: pcta
- [LEG Website](#)
 - Contact Information Password: legs

LEG Reporting Requirements and Timeline

Timeline



Governance Agreement:

- Bi-Annual or Quarterly LEG member meetings

Established LEG's Websites

- [Sault Ste Marie](#)
- [Huntsville](#)
- [Manitoulin Island](#)

Annual Reports

| Name of Report | Description | Timeline |
|---|--|--|
| <p>Qualtrics LEG Report</p> <p><i>NOAMA requires all LEGs to fill out the Annual Qualtrics LEG Report</i></p> | <p>Confirmation of Academic Deliverables:</p> <ul style="list-style-type: none"> • This section of the Qualtrics report sets out the plans of the LEGs and their capacity to deliver the NOSM U Academic Deliverables for the next academic year. • NOAMA forwards the report to the NOSM U Associate Deans UME and PGE. <p>LEG Variable Funding Accountability Report:</p> <ul style="list-style-type: none"> • Total variable funding available is prorated among the LEGs that confirm their interest in pursuing these activities through the Accountability Framework. • NOAMA’s offer of variable Enhanced Research and Scholarly Activity Funding requires: <ul style="list-style-type: none"> – The LEG complete and provide a year-end financial Accountability Report, “Appendix A” to NOAMA summarizing the prior year expenditure – that the LEG will use the funds to develop plans for enhanced research and scholarly activity development and the establishment of support infrastructure for these activities; – variable funding is subject to review by the NOAMA Board | <p><i>The due date will be determined and sent with Qualtrics survey on or around June 30th of each year</i></p> |

| Name of Report | Description | Timeline |
|---------------------------------|---|---|
| <p>Membership Report</p> | <p>Base Funding Formula Allocation Reports</p> <p>To receive base funding, each LEG is required to confirm to NOAMA their Annual Membership and submit year-end financial statements from the preceding year to which the LEG Reporting Requirements are due.</p> <p>Total base funding available is prorated among the LEGs based on their eligible membership as of June 30th, the end of the academic year.</p> <p>NOAMA will provide the LEGs with a listing of their eligible members with their Qualtrics report and request the LEG confirm their membership.</p> | |
| <p>LEG Financial Statements</p> | <p>As a minimum the following statements are required:</p> <ul style="list-style-type: none"> - Statement of Financial Position - Income and Expenditure Statement - Schedule of Payments to LEG Members <p>Preparation of financial statements by accountants can be – audited, review engagement, or notice to reader.</p> <p>The decision as to the level of assurance rests with the LEGs; however, NOAMA does recommend that LEG considers review engagement as a minimum.</p> <p>NOAMA has financial statement templates available upon request.</p> | <p><i>Financial Statements with a year-end from the preceding year to which the LEG Reporting Requirement templates are distributed. For example, In June 2023, financial statements with a year-end date at any point in 2022 would be required.</i></p> |

Application of the Funding Formula

Example Scenario

Total Eligible LEG Members: 1,200 (2023-2024 estimate)

Base Funding: \$600,000 Per capita allocation

- *Leadership/Faculty Development Funding*

Variable Funding: \$2,400,000 Per capita allocation

- *Enhanced Research & Scholarly Activities Development Funding*
- No LEG receives less than \$10,000

| LEG Allocation | Funding per LEG Member |
|--|--|
| Leadership/Faculty Development | $1/1,200 \times 600,000 = \500^* |
| Enhanced Research & Scholarly Activities Development | $1/1,200 \times 2,400,000 = \$2,000^*$ |

****Amounts rounded to the nearest \$100/member***

Group is committed to development of enhanced research and scholarly activity.

In the above scenario, a LEG with 10 eligible members would receive \$5,000 in Base Funding and \$20,000 in Variable Funding for a total of \$25,000 upon successful completion of the annual reporting requirements.

LEG Executive Responsibilities

Description:

As a LEG Lead, representing the LEG executive, you will be responsible for regular communications with NOSM U and NOAMA, representing your community/department as the main contact for the LEG and members as they carry out their scholarly activities.

To ensure success as a LEG Lead, you should be actively involved with NOSM U.

LEG Responsibilities:

- Monitor compliance and ensure the following are carried out (but not limited to) accordingly to the LEG Governance Agreement:
 - Distribution of LEG funding
 - Chair LEG meetings as required
 - Filling other Board roles
 - Changes to LEG membership
- Fiduciary responsibility for the following:
 - BoD Insurance (<http://www.noama.ca/insurance>)
 - Privacy
 - Health Human Resources
 - Financial Risk Management
 - Ensure LEG distributions align with the spirit of the NOAMA AFP
- Overseeing LEG Administrator or any other hired or contracted LEG positions as appointed by the LEG (if applicable)
- Ensure Annual [NOAMA Reporting Requirements](#) are completed
 - Qualtrics Report (collection of LEG academic activities)
 - Review of LEG Membership
 - Ensure completion of annual Financial Statements
- Ensure LEG has a presence at the annual NOAMA LEG Lead Meeting
- Act as a liaison, when required to assist with community/department availability for learner placements responsible by NOSM U scheduling
- Ensure clinical teaching payments, to the LEG, from NOAMA/NOSM U are accurate
- Notifying NOAMA of LEG member changes
- Act as a liaison or key contact point in the community/department for NOSM U when considering faculty applications, faculty reappointments, etc.

Disclaimer:

Please note this document was approved on March 28, 2023 by the NOAMA Board. The materials contained within this document reference NOAMA policies that are always evolving and subject to updates. NOAMA will continue to update the information contained within this document; however, any updated NOAMA policy will take precedence over the information contained within.