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## Bell McLeod Educational Fund Terms and Policies

The Department of Laboratory Medicine and Pathology (LMP) will use the interest generated from the Bell McLeod endowment to support:

- Travel for Educational Purposes
- Graduate Student Professional Development Funding
- Emergency Funding for Graduate Student Support
- Citizenship Award
- Recruitment of Graduate Students and Postdoctoral Fellows
- Graduate Student Awards

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### Travel for Educational Purposes

The Bell McLeod fund may provide travel assistance for: full-time LMP graduate students and University of Alberta-registered postdoctoral fellows with an LMP Faculty Research Supervisor.

Funding may be provided for travel to a major national or international research gathering where the trainee is making an oral or poster presentation. Travel assistance may also be provided to allow the trainee the opportunity to participate in field work or visit a major archive where information critical to their thesis research is lodged or resident experts can be consulted.

1. Applications for Travel awards (using the Bell McLeod Educational Fund - Travel Award form) may be submitted at any time. Applications are routinely managed in the LMP Graduate Studies office.
2. Travel for educational purposes will be funded to a maximum of \$750 per event according to the following schedule:
  - once per master's degree
  - twice per doctoral degree
  - once per postdoctoral fellowship (after the first full year of the fellowship)

The amount of the award will be reviewed on an annual basis by the LMP Graduate Studies Committee.

3. In addition to the application form, the following must be submitted:
  - if the trainee is attending a conference:
    - proof that that a submitted oral or poster paper has been accepted for presentation by the conference organizers, and
    - proof of registration, or a copy of the Conference Registration Form outlining the cost of registration and what is included (meals, accommodation, etc.)
  - if the trainee is requesting travel funds for field work or research purposes, a compelling statement from his or her supervisor explaining why the proposed travel is crucial to the trainee's program must be appended. Requests for travel funding must be approved by the trainee's research supervisor.
4. For graduate students: acceptance at a conference and submission of the travel fund application must be made before program completion; the travel itself may occur after program completion. Travel for field work or visiting a major archive must be completed before program completion. Program completion is defined as the date on which the Thesis Approval/Program Completion form is submitted to FGSR.
5. For graduate students: receipts are not required and funds will be issued upon approval of the award.

If the student is unable to attend the research opportunity as approved by the department or his or her status as a student changes, the Laboratory Medicine & Pathology Graduate Program must be notified in writing and the student may be required to repay the funds awarded.

6. For postdoctoral fellows: reimbursement will be via a University of Alberta Travel Expense Claim and receipts will be required. As per [UAlberta policy](#): "Request for reimbursement of travel expenses must be submitted within 30 days upon completion of the specified trip."
  7. A maximum of \$11,250 per year (the equivalent of 15 awards at \$750) may be used for travel awards on a first come, first served basis.
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### **Graduate Student Professional Development Funding**

The Bell McLeod fund may provide funding to allow LMP graduate students to participate in Professional Development activities such as teaching, presentations, workshops, courses, and seminars designed to enhance communication, career development, and professional practice.

1. Applications for Professional Development funding (using the Bell McLeod Educational Fund - Professional Development Funding Request form) may be submitted at any time. Applications are routinely managed in the LMP Graduate Studies office.
  2. Up to \$200 per person per year can be claimed on a first come, first served basis; this amount is not cumulative and cannot be carried forward from one year to the next.
  3. It is preferred that funding requests are made in advance of the activity in order to facilitate payment. However, if needed, funding requests may be submitted retroactively for activities attended in the current and previous year only.
  4. Only one funding request per activity may be submitted (i.e. funding for one activity cannot be split up over two years).
  5. To apply for funding, submit the application form and proof of the activity in the form of a webpage, brochure, poster, email, etc., which describes the activity, and includes the cost, date(s) and location(s). If approved, either applicants will be reimbursed through the expense claim process (original receipts will be required) or, when possible, the activity will be paid for with a University of Alberta *Internal Sale Form*.
  6. Proof of attendance does not have to be submitted but must be retained and is subject to verification by the department. If the graduate student is unable to attend the activity as approved by the department or his or her status as a graduate student changes, the Laboratory Medicine & Pathology Graduate Program must be notified in writing and the student may be required to repay the funds awarded.
  7. \$1,000 per year will be set aside from the Bell McLeod fund to reimburse graduate students for Professional Development activities. When the \$1,000 is spent, no more funding will be available until the following year (January).
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### **Emergency Funding for Graduate Student Support**

The Bell McLeod fund may be used to augment educational funding for LMP thesis-based graduate students who are within the expected funding periods and whose supervisor, due to unexpected circumstances, is unable to support them. The fund would be used to aid the student for a short period of time at the discretion of LMP Graduate Studies Committee.

1. The application for emergency funding is to be submitted by the supervisor (using the Bell McLeod Educational Fund – Emergency or Recruitment Funding Request form). The following criteria are the basis of assessment and should be addressed in the application:
  - supervisor must justify the request by explaining why their funding cannot support the student
  - student's academic progress must be satisfactory
  - student's funding to date
  - impact on student
  - requested start and end date for funding
2. Applications are submitted to the Graduate Program Office and are considered at the next Graduate Studies Committee meeting. Approved applications are forwarded to the LMP Awards Committee Chair who ensures process was followed before funds are released.

3. When emergency funding is awarded, it is mandatory that both student and supervisor continue to seek alternative sources of student funding. If this funding is secured, the LMP Graduate Studies office is to be notified immediately, and support from the Bell McLeod Educational Fund will be reduced accordingly. If alternative funding has not been secured by the end of the award time period, a second emergency funding request may be made.

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### **Recruitment of Graduate Students and Postdoctoral Fellows**

The Bell McLeod fund may provide funding to recruit excellent LMP graduate student and post-doctoral fellow candidates. This funding is meant to bring trainees to UAlberta for a visit so that a decision can be made by both trainee and supervisor as to whether joining our program is desirable. It is not to be used as relocation funding for new students or postdoctoral fellows.

Funding may involve airfare costs and hotel expenses, etc.

1. Applications for recruitment funding (using the Bell McLeod Educational Fund – Emergency or Recruitment Funding Request form) may be submitted at any time. Applications are routinely managed in the LMP Graduate Studies office and reported to the Graduate Studies Committee.
2. Maximum recruitment funding is \$1,000 per award to supplement the supervisor's contribution.
3. The supervisor's contribution must match the amount of the recruitment award.
4. Expenses are limited to economy airfare, reasonable accommodations for 2 nights, ground transportation, per diem, etc. (travel expenses allowable by the University of Alberta).
5. If available, a maximum of \$2,000 per year may be used for recruitment on a first come, first served basis.

Funds will be issued after receipt of the Bell McLeod Educational Fund - Recruitment Report providing itemized expenses (including receipts) and a summary of the outcome of the recruitment.

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### **Bell McLeod Educational Fund Citizenship Award**

1. The award honours Laboratory Medicine & Pathology graduate students for academic mentorship/service/leadership activities within the Department of Laboratory Medicine & Pathology, the University of Alberta, and the broader community. The activities must support the education and teaching mandate of the Bell McLeod Educational Fund.
2. The award is valued at \$800, given once per year.
3. Graduate students can receive the award once only in their career.
4. Nominations from any source (including self-nominations) are accepted.
5. The application will consist of:
  - One page statement from/about the nominee (no CV is required)
  - Evidence of the mentorship/service/leadership activity
  - Reference letters will be accepted from any source (mentees, supervisors/faculty members, other students, student group, etc.), and must demonstrate how the activities support the Bell McLeod Educational Fund's education and teaching mandate.
6. If there is no suitable candidate, the award will not be given.

Call for nominations will be early January, with applications due at the end of February.

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### **Graduate Student Awards**

The Bell McLeod fund may provide LMP graduate students with awards for academic accomplishments. Awards are defined by the GSC.

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A reserve fund of not less than \$20,000 should be in place on December 31.

A review of the fund activities (by means of an annual report) will be undertaken at the end of the calendar year (December) by the Laboratory Medicine & Pathology Awards Committee.