



Purpose: The purpose of this document is to provide guidelines for spending during the **Research Partnership-Building Workshops Program**, and to outline the reimbursement process.

Reimbursement Policy

The McDonald Institute will reimburse applicants for certain eligible expenses to the full amount. The eligible expenses includes a per diem of \$75 CDN (\$16 for breakfast and lunch, \$43 for dinner). It is the responsibility of the applicant to budget accordingly. The tables below outline which expenses are eligible for reimbursement and those that are ineligible.

Eligible Expenses
Air travel; claimed at the lowest rate available and not to exceed full economy fare. Includes flight cancellation insurance and seat reservation charges.
Accommodation This includes any necessary accommodation while travelling to and from the exchange destination, as well as accommodation for the duration of the exchange. If in-kind accommodation is available for the duration of the exchange and meets the needs of the applicant, the applicant should opt for such accommodation.
Travel health insurance when such benefits are not provided by the institution and/or other sources.
Event Hosting This includes venue rentals, audio-visual rentals and services and catering support (not including alcohol) required to operate a novel workshop or other eligible event.

Ineligible Expenses
Support for pre-existing, regularly recurring events (e.g., experimental collaboration workshops). No travel, accomodation, insurance or hosting expenses incurred to participate in or operate a non-novel event may be reimbursed by a voucher awarded to this program. If the novel event is affiliated with or concurrent with a pre-existing event (e.g., a conference), only the participants' expenses incurred as a consequence of the novel event may be reimbursed (e.g., extended accomodation costs, additional venue costs, differential travel costs resulting from an extended stay that exceed the original return-trip costs to attend the

pre-existing conference, etc.). If you have questions about managing separation of expenses between a novel event and an affiliated pre-existing event, please contact the Program Officer at admin@mcdonaldinstitute.ca
Alcohol
Personal Insurance for Car Rental
Commuting costs between one's residence and place of employment/study, or between two places of employment.
Household items/set-up costs including furniture, decorations, other household supplies
Personal Insurance
Passport and Immigration Fees
Reimbursement for airfare purchased using personal frequent flyer points programs

Please note that this is not an exhaustive list of ineligible expenses. For a more comprehensive list, please refer to the CFREF Administration Guide: http://www.cfref-apogee.gc.ca/program-programme/admin_guide-guide_administration-eng.aspx#_Direct_costs

In some instances, there are exceptional circumstances to the policy. If you believe you have an item that requires discussion, please contact the McDonald Institute Financial Officer to support staff prior to incurring any expenses for discussion and possible pre-approval.

Supporting Documentation

In order to obtain reimbursement for eligible expenses, the following documentation must be retained and provided to the McDonald Institute Finance Officer immediately following the travel:

1. Boarding passes and itineraries; for all flights taken to and from the exchange destination. As per the tables above, only air travel at the lowest fare available/not exceeding the full cost of an economy airfare will be reimbursed.
2. Receipts for transportation; any transportation (taxi fare, bus fare, etc.) taken for the purpose of travel between the home city and exchange destination.
3. Receipts for accommodation; receipts for hotels used during travel to the exchange destination.
4. Any other receipts/supporting documentation for eligible expenses incurred while on exchange.

Please submit original copies by e-mail (if electronic) and mail copies of all original receipts and other supporting documentation to the McDonald Institute. We advise that you take photocopies of all documentation for your own records prior to submission.

Reimbursement Process

1. Submit all required documentation as indicated above to the McDonald Institute Finance Officer no later than (14 business days) from the end date of the travel period.

2. Provide your contact information to which the cheque will be mailed.
3. Should you prefer an electronic fund transfer, you will need to provide (i) Bank Name (ii) Bank Address including City/Province/Country and Postal Code(iii) Account/IBAN (iv) SWIFT ID.
4. Please contact the MI Finance Officer with your preferred method of reimbursement (contact info below).
5. You will receive your reimbursement within (60 days/2 months) of submitting a complete claim.

Other Funding Opportunities

We highly encourage those applying for this program to search additional sources of funding. If the application to the McDonald Institute is successful, we can issue a letter of support for applications to complementary funding agencies. Any additional funding sources that are obtained must be declared to the McDonald Institute.

Contacts

Name	Title/Position at MI	E-mail
Gregory Ridge	Finance Officer	finance@mcdonaldinstitute.ca
Chineze Onuoha	Program Officer	admin@mcdonaldinstitute.ca