



**Purpose:** The purpose of this document is to provide guidelines for spending and reimbursement eligibility while participating in the Graduate Student Exchange Program.

### Reimbursement Policy

The McDonald Institute will reimburse applicants for certain eligible expenses to the full amount, or maximum amounts specified in this document. All reimbursements must be invoiced to the Institute with receipts for all incurred travel and accommodation costs. Reimbursements can be made to Tri-Council eligible research accounts at post-secondary institutions. The Institute recommends that student awardees should charge expenses to supervisors' research accounts and that the supervisor should then invoice the Institute for reimbursement of the awardees' documented expenses. In cases where this is not possible, alternative reimbursement or direct-payment arrangements must be made with the Institute on an individual-case basis.

Supervisors are expected to contribute financial support to Graduate Student Exchanges from their research accounts on the following ramp rate:

Exchange Duration	Est. MI Support	Min. Expected Supervisor Support	Est. Total Costs
1 weeks	\$1,500	10% of total costs	\$1675
2 weeks	\$2,500	20% of total costs	\$3125
4 weeks	\$3,000	30% of total costs	\$4275
8 weeks	\$4,500	40% of total costs	\$7500
12 weeks	\$6,000	50% of total costs	\$12,000

The tables below outline which expenses are eligible for reimbursement and those that are ineligible. It is the responsibility of the applicant to budget accordingly. In the event that cost-of-living differential awards specified in an award have been miscalculated (e.g., wrong geographic locations), please contact [admin@mcdonaldinstitute.ca](mailto:admin@mcdonaldinstitute.ca) prior to the date on which the relevant expense(s) will be incurred.

Eligible Expenses
<b><i>Travel (Air, Rail, Bus, Taxi, Car Rental):</i></b>
Travel should use the most economical and safe mode (i.e. car rentals only when no other

option available) Reimbursements are not to exceed economy fare. Includes flight cancellation insurance and seat reservation charges.

**Accommodation\*:**

Any necessary accommodation while travelling to and from the exchange destination is reimbursable (e.g., hotels for multi-day trips), based on normal Tri-Council guidelines.

Reimbursement of accommodation for the duration of the exchange (e.g., apartment rental), is limited to awardees who must simultaneously cover occupancy costs of their permanent home (i.e., mortgage or rent) as well as their exchange accommodations, up to a maximum of three months' duration. Accommodation reimbursements will be limited to the most recent [CMHC reported](#) maximum urban average rental cost for a one-bedroom apartment (e.g., Vancouver single bedroom apt.). If the awardee has sublet or rented their permanent home during an exchange visit, then only the differential costs of the exchange accommodations over and above the home rental rate may be reimbursed such that:

*reimbursement claim\* = exchange accommodation cost – rental income ≤ max. cost ceiling*

*\*\*No insurance, utility bills, or maintenance costs can be included in the above reimbursement formula.*

\*If suitable and safe host-provided accommodation is available for the duration of the exchange the applicant should opt for such accommodation. Claims to reimburse host-subsidized accommodations are limited to the amount charged to the awardee.

**Per Diems:**

A travel per diem of \$114 CDN, or itemized by applicable meals (breakfast, lunch dinner) may be claimed for reimbursement. This per diem claim is limited to the time-in-transit to and from regular residence to the site of the visit. The travel per diem may also be claimed for the duration of visits not exceeding one week's duration.

A cost-of-living "subsistence" per diems is intended to mitigate additional living expenses not otherwise incurred by the awardee. For visits of greater than one week's duration, the maximum claim is \$25 per day. The actual award amount will be based on the [cost-of-living differential](#) between the awardee's home address and the site of the exchange and is indicated at the time of award. The cost-of-living differential will only account for net differences in groceries, utilities, and transit costs.

*Sample Calculation (CDN dollars):*

	<i>Kingston, ON</i>	<i>London, U.K.</i>	<i>Duration (days)</i>	<i>Differential per diem</i>
<i>Food</i>	<i>\$620</i>	<i>\$810</i>	<i>30</i>	<i>\$6.33</i>

<i>Transport</i>	<i>\$75</i>	<i>\$175</i>	<i>30</i>	<i>\$3.33</i>
<i>Utilities</i>	<i>\$170</i>	<i>\$300</i>	<i>30</i>	<i>\$4.33</i>
<i>TOTAL</i>				<i>\$14 per day</i>

<b>Ineligible Expenses Under this Program</b>
Alcohol
Personal Insurance for Car Rental
Commuting costs between one's residence and regular place of employment/study, or between two places of employment.
Conference or workshop registration fees
Conference or workshop travel costs
Tuition or registration fees
Household items/set-up costs including furniture, decorations, other household supplies.
Personal Insurance
Passport and Immigration Fees (such as Biometrics or processing fees)
Reimbursement for airfare purchased using personal frequent flyer points programs.

The list of ineligible expenses for this program includes conference and workshop registrations, which are outside the scope of the program's purposes. However, mandatory accommodation fees for multi-week postgraduate summer schools may be reimbursed. Please note that this is not an exhaustive list of ineligible expenses. For a more comprehensive list, please refer to the Tri-Council Administration Guide on "Travel and travel-related subsistence expenditures: <https://nserc-crsng.canada.ca/en/funding/research-partnerships-and-collaborations/inter-agency/tri-agency-financial-administration-1#travel-and-travel-related-subsistence-expenditures>

### **NSERC Indirect costs**

Eligible Canadian institutions hosting a Graduate Student Exchange are qualified to receive funding from the McDonald Institute to contribute toward the indirect costs of supporting a NSERC research activity; some exceptions may apply ([Eligible and ineligible expenditures](#)). A total allowable amount not exceeding 17 percent of the value of the award can be requested for the indirect costs of the NSERC-MRS funded research. To be explicit, your institute can request funds up to the value of a Graduate Student Exchange award x 17% as an indirect amount to recover the real costs of supporting this award at your institution. These indirect costs must be attributable to the specific research initiatives related to the NSERC grant, and not for general overhead and administration costs of the institution as a whole. Eligible indirect costs must be separated out in the reimbursement invoice with specific expenses delineated and allocated to

one of the standard 5 indirect cost categories. Unspecified or ineligible indirect costs will not be paid.

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 **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/relocation between the home city and exchange destination.
3. Receipts for accommodation; may include rent receipts, receipts for hotels used during travel/relocation to the exchange destination.
4. Any other receipts/supporting documentation for eligible expenses incurred while on exchange.

**Please submit original documents by e-mail (if electronic documents are originals) and mail all physical receipts and other supporting documentation to the McDonald Institute. We advise that you take photocopies of all documentation for your own records/backup 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 our programs 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**

Please address any questions or comments to the McDonald Institute Administration team at: [admin@mcdonaldinstitute.ca](mailto:admin@mcdonaldinstitute.ca).