

The Art of the Possible Grant Program

Department of Family and Community Medicine

AOP 2019 Budget Criteria & Expense Instructions (revised Feb 15/19)

Important reminders when creating your 2019 AOP Budget

- AOP grants continue for two years. The maximum budget amount is \$5000 for both years combined.
- Budget amount for research assistant must include an extra 10% for benefits in addition to the hourly rate.
- No food expenses are permitted in an AOP budget, unless the food is required as a prop for the study.
- Research assistants cannot be listed on the project team if they are being paid. They can however be listed as an author on project dissemination if they are paid.
- **NEW** For incentives, the maximum for each is \$25 and the total must not exceed \$250.

Important reminders when requesting reimbursement for AOP expenses

- If you are requesting reimbursement for gift cards or certificates, you must ask each recipient to sign a UofT receipt form (available from the OES)
- Original receipts are required for all purchases.
- Boarding passes are required for all flight reimbursements.
- Credit card statements are required if there is currency exchange involved in the purchase.

Project Expenses: Allowed

Research Assistant Costs

(see “Expense Instructions” below for important information about Payroll & Hiring)

- conducting interviews and focus groups
- coding transcribed texts
- data analysis
- preparing manuscripts

Transcription costs (see “Expense Instructions” below for more information)

Photocopying

Incentives (ie: gift cards, honorariums, stipends for focus group/study participants)

IMPORTANT!!

- 1) **The maximum for each incentive is \$25.**
- 2) **Total incentives must not exceed \$250.**
- 3) **Each gift card recipient must sign a UofT Gift Certificate Receipt before the expense can be reimbursed.**

IT/eLearning related costs @ maximum \$75.00/hour (Technological consultation, needs assessment, content writing, evaluation, graphic design and animation)

Learning Portals/Websites @ maximum \$2500 (Programming, learning management/content management systems).

These portals or websites must be hosted by the DFCM unless authorized by the OES.

Logos/Illustrations

Simulation costs (all modalities eg: anatomical models)

Project dissemination costs

- poster layout and printing costs to a maximum of \$250.00
- Conference Travel/registration to present AOP project/work - maximum of \$750

Project Expenses: Not allowed

Includes but is not limited to:

The purchase of food (unless the food is used as a prop for the study)

Publication costs i.e., Open Access and like journal publication fees or costs associated with manuscript publication.

Payment to Education Research Consultants, U of T Administrative and Research Staff and Faculty (both appointed and casual/contractual) for duties normally performed during normal operational hours, or outlined in the individual’s job description

Reimbursement for participant travel/parking

Conceptualization and design of representative imagery

Payment for anyone listed as a member of the project team

AOP Expense Instructions

Should you require support or have questions about expenses, we advise you to contact the Office of Education Scholarship at dfcm.edscholarship@utoronto.ca ideally prior to incurring that expense.

All expense documents must be signed by the Project Lead, identified as an AOP Project, and include the project's unique order number. If you do not know your order number please email dfcm.edscholarship@utoronto.ca.

Access to Grant Funds

Funds will be made available to grant holders **when all of the following have been completed**:

- final OES approval of the project is granted
- project lead has signed and returned their letter of agreement
- proof of ethics approval or exemption has been submitted to the OES. (If required, funds will be released to allow for a Research Assistant to work on the REB application. No other expenses or activities are permitted until after proof of REB approval/exemption is obtained.)
- all team members have completed and provided certificates for TCPS2 Core ethics training

Expense Reimbursement

- Expenses incurred on the grant holders account/credit card can be reimbursed by completing a paper copy of the Expense Report <http://finance.utoronto.ca/forms/processing/>
- Forms must be submitted to the Office of Education Scholarship with the original receipts. Scanned copies of receipts will not be accepted.
- All expense reimbursement requests are governed by the University of Toronto's policies as outlined in the Guide to Financial Management (<http://www.finance.utoronto.ca/gtfm.htm>) and within that document, the policy on Travel and Other Reimbursable Expenses <http://www.finance.utoronto.ca/gtfm/travel/policy.htm>.

Invoices

- While it is preferable for grant holders to submit expense reimbursements, we know that sometimes you will need to submit an invoice for payment instead. Invoices and any corresponding receipts, packing slips, or other documents can be submitted to the Office of Education Scholarship for processing. If by email please send them to the Office of Education Scholarship (dfcm.edscholarship@utoronto.ca) and copy the DFCM Financial and Operations Officer (dfcm.financeops@utoronto.ca)
- We advise all grant holders to make copies of all documents prior to submission to the Office of Education Scholarship.

Hiring of Research Assistants

- Before recruiting a Research Assistant, you must contact the Office of Education Scholarship to discuss your RA requirements
- Research assistants can be paid \$25-30/hr. They will be hired by DFCM as casual USW employees, therefore you must factor into your budget an additional 10% cost for benefits.
- DFCM must issue a Letter of Offer for each Research Assistant assignment, *even if they're already employed on another DFCM project*. The DFCM Finance Office will need to know the following information:
 - RA's PERSONAL INFO:
 - name
 - mailing address
 - email
 - TERMS OF EMPLOYMENT
 - Employment period: Start and end dates
 - where will funds come from (your AOP order number)
 - Estimated # of hours/week they will be working for you (can be 'up to' or 'maximum' #)
 - Who will the RA report to
 - What will be their hourly rate: Note that a Research Assistant's rate of pay is determined not by their level of expertise, but by the task they are doing
 - Maximum amount of pay
 - Description of responsibilities

Submission of timesheets:

- Timesheets must be signed by the Grant Holder prior to submission to DFCM and include the AOP order number.
- Please submit timesheets to the DFCM Financial and Operations Officer (dfcm.financeops@utoronto.ca) and copy the Office of Education Scholarship (dfcm.edscholarship@utoronto.ca).
- All Human Resources related areas, including the hiring of casual staff are governed by the University of Toronto policies listed on the Human Resources website and collective agreements:
<http://www.hrandequity.utoronto.ca/about-hr-equity/policies-guidelines-agreements.htm>

Transcription

- Transcription costs can vary depending on technical language, recording quality, etc. Here are sample prices from two transcription services that are used by DFCM (NB: these are 2016 prices)
- Flying Fingers <http://www.flyingfingers.net>
 - 1-on-1 interview - \$2.50/per audio minute
 - Focus groups - \$3.50/per audio minute
- CMBusiness & Transcription Service cmbustranscripts@rogers.com
 - Focus groups: 60 minutes - \$162.00; 90 minutes - \$243.00
 - 1-on-1 Interviews: 60 minutes - \$148.00; 90 minutes - \$221.00

Payment of Stipends

- For processing a stipend payment, faculty are required to fill out a Cheque Requisition Form and a Small Suppliers Certification form (if the total consideration for taxable suppliers made by the person in the 12-month period did not exceed \$30,000). If you have any questions about these forms, please contact Iryna Kravchenko at dfcm.businessofficer@utoronto.ca.