**MATCHING FUNDS REQUEST FORM – FACULTY OF ENVIRONMENT**

***Effective February 1st, 2023***

**INFORMATION REQUIRED FOR APPROVING MATCHING FUNDS**

***Developed from policy/procedures approved by Environment Faculty Council on Nov. 25, 2013:*** [***https://uwaterloo.ca/environment/faculty-staff/policies-procedures-terms-reference/adhoc-research-support***](https://uwaterloo.ca/environment/faculty-staff/policies-procedures-terms-reference/adhoc-research-support)

**If requesting matching funds for a grant from the Dean’s office, please provide the following information to the Associate Dean of Research (ADR), Rob de Loë:** [**robdeloe@uwaterloo.ca**](mailto:robdeloe@uwaterloo.ca)

**and copy the Faculty Research Coordinator, Sandra Ramautarsingh: sramauta@uwaterloo.ca**

1. Deadline date by which you must submit your application:
2. Project title:
3. Name of the sponsor/agency:
4. Name of program to which you are applying:
5. Name and full address of the sponsor/agency or individual to whom the support letter should be addressed:
6. Synopsis: 3-4 sentences (that will be used in the support letter) that explains what the project is about and how it will benefit the Faculty of Environment at Waterloo:
7. Request for matching funds - **Cash support**:

For matching funds, we have calculated an average amount per student. This is based on graduate student funding:

* Cash support - $8,750 per PhD student (domestic and international)
* Cash support - $2,500 per Masters student (domestic and international)

***(Note:*** Most grants do not allow us to count TA funding as matching funds as the student has to work for that money, and TA work is unrelated to supporting your research project. However, the GEA (Graduate Experience Award)) portion normally can be counted as matching funds. The GEA is valued at $1250, and a TAship is valued at the [current rate](https://uwaterloo.ca/graduate-studies-postdoctoral-affairs/current-students/graduate-teaching-assistantships-ta-and-graduate-research#ta). Current matching funds are the GEA amounts received, based on the average pattern of TA provided funding for non-DDI PhDs and for Master’s students over the course of their program. Also, you must include the remainder of the student funding in your grant budget in order for your student to receive the minimum funding required).

\*At the end of this document, please find more guidance on how much you should **budget** for each student.

**Please complete this table with your request:**

|  |  |
| --- | --- |
| **NUMBER OF STUDENTS:** | **For each student – indicate the START DATE(s)/YEAR(s)** (so we can record our cash commitments in the right fiscal years) |
| No. of PhD student(s) ……. x $8750 = $ …………… | **Start Date:** |
|  |  |
| No. of Masters: student(s)…… x $2500 = $ …………. | **Start Date:** |

1. Request for matching funds - **In-kind support**:

* PhD and Master’s student (and other HQP) space valued at $1,500 per year: $1,500 x …….No. of years x…………No. of students/other HQP = $………………….
* Lab space for students/other HQP valued at $184.00 per sq. meter: $184.00 x ………No. of sq. meters x …….No. of years = $....................

***(Note, if your student space is in your lab, use this bullet instead of the one above).***

* Lab equipment to be used in this project - Market value of use $..................

**(Please provide some details for us to include in the letter).**

* Own office space (depends on the grant; not allowed for Tri-Agency grants) valued at $8,800 per year: $8,800 x ….No. of years = $………………..
* Meeting space for events valued at $1,000 for each use: $1,000 x ….No. of days = $...................... ***(Not applicable on SSHRC grants)***
* Percentage of researcher’s time (depends on the grant; not allowed for Tri-Council grants): Enter percent and the dollar value you want to allocate. To calculate this, take your annual salary x 1.26 (to add 26% benefits) x…. % of time on the project (e.g., x 0.15 for 15%): Enter % and dollar value of that: …….% & $............... x No. of years = $ …………......
* Other: Staff time (IT, Communications, etc.,) valued at $75.00 per hour:

$75.00 x ……No. of hours = $………………..

* Overhead costs not covered and only if the sponsor/agency allows overhead, (e.g. default overhead is 30%. If the sponsor allows 15% then 15% will be in-kind). Enter percent in-kind and dollar value:………….% & $.........................

1. Request to add additional cash support in your letter, from funds you have already and want to allocate to this project as matching, (e.g., start-up funds, overhead return, etc.)
   1. Provide details on the amount and source: ………………………………………………..
2. While TAs as matching funds\* cannot be counted, these can be mentioned in the letter as part of the student funding package. If you would like a note to be added about this additional student support, please indicate: **Yes ……** or **No** ……
3. Indicate the total amount in the proposal that will be allocated to you (i.e., the funds that will come to UW & ENV if the grant is awarded): $........................................................
4. **Course buy-outs** for project leaders that count as matching cash funds may be considered in cases where the administrative load associated with a project is significant. Five conditions apply: (1) The project leader must be a faculty member in the Faculty of Environment. (2) The grant must provide a minimum of $600,000 in every year in which a course buy-out is required. (3) The funding agency must provide overhead sufficient to cover the cost of the buyout ($18,000/course); overhead can be direct, as a proportion of the budget, or indirect, as in the case of Tri-Council grants. (4) Prior approval for the course buyout has been secured from the applicant’s Chair/Director. (5) The project is not an ‘Infrastructure Grant’.

If course buyouts are applicable, please request/indicate: …………………………………………………..

***NOTE***: Please start the process well ahead of your deadline; we suggest that you submit your request at least ***two weeks*** in advance. For some grants, you can get an additional 20% cash match from the Office of Research (OR). OR requests are due ***a month*** before the grant’s deadline, and Env’s process must be completed before requesting support from OR. Sometimes UW research institutes, (e.g., WISE, Climate Institute, Water Institute, WIN, etc.) will provide in-kind matches for larger grants; please contact them directly to explore.

**\*BUDGETING - Re: Students’ Cost:**

When calculating the amounts in your own budget, please note the following:

**1) For Graduate Research Assistantships - GRAs*,*** please add 4% vacation pay and 10% benefit costs to the current allocation.

For more information, please see the following links for current rates per term, and info. on GRS versus GRA:

* Rates - <https://uwaterloo.ca/graduate-studies-postdoctoral-affairs/current-students/graduate-teaching-assistantships-ta-and-graduate-research#ra>
* GRA versus GRS - <https://uwaterloo.ca/human-resources/support-managers/payroll/graduate-research-studentship-vs-graduate-research>

**2) Inflation**: when building your budget in the grant, please add 2% inflation per year to your GRA amount in the grant.

**3) Number of Terms to budget for:**

|  |  |
| --- | --- |
| **STUDENT TYPES** | **MINIMUM NUMBER OF GRS/GRA TERMS**  ***(PI to budget from grant to ensure min. funding)*** |
|
| **Domestic non-DDI PhD** | At least 6.5 terms |
| **International non-DDI PhD** | At least 9.5 terms |
| **Domestic Master's** | 0 required, but funding encouraged |
| **International Master’s (non-IMAE)** | $14,000 supervisor commitment, but additional funding is encouraged |
|  | $1,500 supervisor commitment, but additional funding encouraged |