Guidebook 2018-19

Information for SPICES Teams

Key Info:

- Your project cycle is active from May 1, 2018 - April 30, 2019.
- Your Outcome Report, including budget narrative, must be submitted within 30 days of your project's completion.
- All project expenses must be spent and submitted for reimbursement prior to April 30, 2019.
- You must keep all original receipts and submit according to the business practices of the departmental account to which your SPICES funds have been transferred.
- SPICES funds can not be used to purchase alcohol
- SGS reserves the right of final approval of the grant and the right to refuse or terminate any contribution.

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1. Terms and Timelines

Your project cycle is active from May 1, 2018 - April 30, 2019.

This means that expenses incurred must fall within these dates.

We understand that project plans can shift and change over time, and we expect a certain level of adjustment between your original proposal and unanticipated turns along the way. Any significant deviations in budget, timelines, or project milestones/deliverables must be cleared through SPICES Program Coordinator prior to action. A REVISED BUDGET and WORKPLAN may be required. Email spices@mcmaster.ca for any questions.

2. Role of the Liaison

As the liaison with SPICES Coordinator/SGS it is your responsibility to relay relevant information from the SPICES program coordinator to the other members of your team. In addition, we appreciate staying connected with your project through progress updates, notifications of upcoming events and activities, surprises, milestones, challenges encountered and overcome. The SPICES coordinator is available for any troubleshooting your team may encounter, but also for general encouragement and to celebrate successes.

3. Role of the Treasurer

Your team must designate a project TREASURER. The treasurer is responsible for working with a McMaster department administrator, keeping track of funds relative to the project budget, as well as disbursements. Your treasurer must be a current McMaster graduate student or Postdoc in good standing. An account of all monies spent relative to your approved budget will be required as part of your outcome report submission.

4. Finances

i. Amount Granted

Your project has been approved for the amount indicated in your Letter of Offer.

ii. Restrictions

SPICES funding can not be used to purchase alcohol.

iii. Deadlines for Reimbursement
All project expenses must be submitted prior to April 30, 2019 to be eligible for reimbursement.

iv. Receipts vs Invoices

You will be required to submit original receipts in order to be reimbursed. We recommend taking a copy of the receipts for your own records as well.

When expenses are paid first out-of-pocket by a team member, ORIGINAL RECEIPTS must be obtained. The university requires proof of payment on expenses. Therefore, a document that is simply marked ‘invoice’ is insufficient. The documentation must show that a payment was received i.e., receipt.

v. Requests to Change the Budget

Any significant deviation from your approved budget must be submitted to the School of Graduate Studies for approval request (via spices@mcmaster.ca) prior to expenditure.

vi. Budget Narrative

A Budget Narrative (summary of actual expenditures compared to original budget approval) must be provided to SGS upon completion of your project, as part of the Outcome Report.

vii. Surplus Funds

If your project comes out under-budget, leftover funds are to be transferred back to SGS through MOSAIC Journal Entry.

viii. Accessing Funds

The SPICES coordinator will review the types of expenses in your approved budget and will work with your team and other McMaster staff to determine the funds transfer method. Generally, it will be one of two ways:

a) One-time External Payment

The School of Graduate Studies may be able to issue a cheque to an external company or organization for the full amount of the grant, or to your group if there is an affiliated bank account. In this case, a one-time payment can be issued directly.

b) Internal Funds Transfer
Funds will otherwise be transferred from SGS to a departmental account though Journal Entry. In this case, your day-to-day expenses and reimbursements will be processed through the department (usually a grad program office affiliated with your project treasurer).

You must keep all original receipts and submit them according to the usual business practices of the department. Please note that these expenses are typically reimbursed after costs are paid out-of-pocket.

**MOSAIC PROCESS FOR Out-of-Pocket EXPENSE REIMBURSEMENT:**

1. Treasurer sets themselves up in the MOSAIC system

   - For to get you reimbursed you must now add [name of your friendly administrator/McMaster staff person] as a *delegate* in the mosaic admin system. Once you have added your administrator, they can process your reimbursement (if you are not sure who your admin person is, contact Andrea Cole at spices@mcmaster.ca).

   To add your admin:

   1. Sign into the mosaic portal at [http://www.mcmaster.ca/mosaic/](http://www.mcmaster.ca/mosaic/) (use your MacID for employees and Password) 2. Click on "MY PROFILE” 3. Click on Delegate Entry Authority

   4. ADD [name and email address of administrator] as an authorized user & save

   Please let [Administrator] know once you have added them. The funds for reimbursement will be deposited directly into your bank account.

2. Treasurer: *Submits receipts to admin person*

   - we suggest you take photocopies since the originals are required to be submitted -treasurer will be responsible for disbursing funds to each/any of the individuals who paid out-of-pocket.

3. Admin support person processes the claim -reimbursement directly into treasurer’s bank account

4. Treasurer disburses funds as appropriate

5. Treasurer keeps track of all of the actual expenses relative to proposed/approved budget (this is a required item for your team’s SPICES Outcome Report)
5. SPICES Webpage Access

Each approved SPICES project will have its own dedicated profile on the SGS website (https://gs.mcmaster.ca/graduate-student-life/spices), and your team will be able to add its own project updates along the way. **To request a username and password for your spices group to access its web profile, email Andrea at spices@mcmaster.ca and include all of the group members you would like to give updating privileges to.**

6. Reporting Requirements - Outcome Report

There is an Outcome Report template online that you will complete within 30 days after your project is finished. Use your web login access and click on “Create Outcome Report”.

The report template will prompt you to answer the following questions: Project Team Members Info, Project Contact Information (web url, email, social media handles etc), Deliverables, Lessons Learned, Highlights, Budget Narrative, Acknowledgements, Photos (optional).

For the Budget Narrative, you must provide a breakdown of your actual costs relative to the budget you projected in the proposal. To do this, use that original budget, and add one more column to show the actual (itemized) expenses next to the projected ones. Provide an explanation of any major variances. The Budget Narrative is a mandatory piece of documentation which you are required to submit with your Outcome Report to the School of Graduate Studies within 30 days of your project's completion, or May 31, 2019 (whichever comes first). The Outcome Report template also gives you the option to include photos in your report. Please ensure that identifiable human subjects in your photos have given consent to having their photo taken and for promotional purposes, since the university may publish parts or all of your report.

7. Getting the Word Out! Promoting Your Project Events and Activities

Promotion is key for reaching your target audience and stakeholder communities. We have found a lead time of at least 2-3 weeks ahead of an event is a good amount of time for promotions to circulate for the grad student community, and that the more channels, the better. In addition to the networks and channels you have access to already, here are a few ways SGS can help too:

i. Promotion through SGS (email & social media)
SGS sends a weekly email to over 4,000 McMaster graduate students from gsevent@mcmaster.ca. “The Mailer” can be a useful way to promote your events and activities to a broad graduate student audience, as well as postdoctoral fellows, grad chairs and administrators associated with grad programs.

If you would like SGS to help promote your events and activities through the mailer, complete the SGS Promotion Request Form here: https://gs.mcmaster.ca/graduate-studies-promotion-request-form

A minimum of three days is needed to process your request. The mailers go out on Tuesday, so your form should be submitted by Friday of the previous week.

If you would like us to share a Facebook event to our Facebook page, McMaster School of Graduate Studies. In the message, please include one or two sentences about what your event is, mention that it is a SPICES project, and include a link to the Facebook event page.

8. Event Safety & Conduct

For any events on-campus or off-campus that your team is organizing, review the Student Event Risk Management Manual before you start and consult with Environmental & Occupational Health Support Services (EOHSS) as needed


EH OSS Contact: eohss@mcmaster.ca Or ext. 24352

9. Ethics

Since SPICES grants are not awarded to research projects (you will not be collecting data from human participants or planning to publish your work in a paper or presenting it at a conference). But this does not preclude your SPICES team from being ethical!

mygradskills.ca contains modules on Community Engagement as a resource including community engagement and ethics.

10. Intellectual Property

Should you have any questions or needs around legal agreements, intellectual property,
11. Stay Connected!

We love hearing about the progress of your projects and following along the successes and challenges.

We can put posters up in the School of Graduate Studies Office, possibly connect you with different on/off campus affiliates, and help profile your project.

In SGS we have a communications coordinator who may be interested in doing a story on your project or event if you let us know in advance. These stories sometimes get taken up by local media as well.

Do keep the SPICES Coordinator in the loop and let us know about upcoming events and activities you have on the go.

Plus, we love to ‘brainstorm’ and are always willing to try and help throughout the project cycle.

Feel free to contact SPICES coordinator, Andrea Cole at spices@mcmaster.ca or x23437 any time.